Agora Verkehrswende

ANALYSIS

Joining knowledge forces for sustainable transport policies in Africa

An initial stocktake of think tanks, NGOs and academic institutions from across the continent

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Imprint

Joining knowledge forces for sustainable transport policies in Africa

An initial stocktake of think tanks, NGOs and academic institutions from across the continent

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REPORT BACKGROUND

The report was jointly prepared by Agora Verkehrswende and Transport for Cairo (TfC) as part of the *Rethinking Transport* project, implemented by Agora Verkehrswende and the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ). This first edition of the report is intended as a starting point for connecting organisations and is a living document. As such, it is not exhaustive; several organisations were contacted but did not respond further, other organisations were not contacted, or the authors were not aware of them upon writing. The same applies to the definition and delimitation of criteria for organisations for which a degree of ambiguity is inevitable.

We welcome you to reach out to us with suggestions for organisations to be included future editions.

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Foreword

Dear reader,

This report *Joining knowledge forces for sustainable transport policies in Africa* provides insights on the landscape of organisations working in the field of sustainable transport policy in Africa. Based on a survey conducted in the spring of 2025, we analysed responses from 32 organisations from 12 countries across Africa. These organisations play a key role as knowledge intermediaries in supporting policy development, capacity building, promoting awareness and creating ownership in the transformation to climate-neutral and more accessible transport systems.

Today, African countries have some of the world's lowest motorisation rates, averaging only 43 vehicles per 1 000 people. However, by 2050, the continent is projected to host a growing middle-income class three times larger than that of today, the world's youngest population with a median age of 19 and one quarter of the global population. Africa's mobility needs will increase with economic growth, and motorisation is predicted to rise as well. While this trend may be unavoidable, decoupling motorisation from rising CO_2 emissions and resulting climate impacts is essential to secure sustainable socio-economic development. In this context, African countries can leapfrog directly to zero-emission mobility, led by the electrification of public transport including motorbikes, buses and later by private vehicles, while also improving public transport services and expanding infrastructure for shared and active modes of transport. This enormous challenge calls for a new approach: it requires immense investment, yet fiscal resources are limited, and funding through international cooperation is on the decline. To bridge this gap, African countries can create favourable conditions for attracting investment in sustainable transport by ensuring long-term policy planning and viable financing conditions. Organisations engaged in sustainable transport policy research, such as think tanks, NGOs and academic centres of excellence, play a crucial role in supporting decision-makers with evidence-based policy recommendations to create these conditions.

The landscape of organisations working in sustainable transport policy in Africa is new and expanding, with most organisations established less than 20 years ago. There is more attention given to the mobility transition in transport (access to shared and active modes of transport) than on the energy transition (electrification and decarbonised energy supply). Organisations address mobility across different modes, often integrating walking and cycling as first and last-mile solutions for popular and formal public transport. Most organisations direct their work towards government actors and policymakers as their primary beneficiaries and target group. These efforts are largely sustained through support from international cooperation actors, which provide both funding and strategic collaboration. The most significant challenge organisations face is financial stability, which limits their ability to make long-term plans, retain staff and expand their activities.

Closely tied to this is the challenge to establish and sustain meaningful cooperation partnerships, which are important for improving access to both technical and financial support. Organisations across the board highlight the importance of these. At the same time, more can be done to promote cooperation and knowledge exchange between organisations in different African countries. In this first edition, discourse on the need for an African community of organisations for sustainable transport through policy is one step closer to this goal.

Christian Hochfeld
Executive Director, Agora Verkehrswende
Berlin, September 2025

Key takeaways

1. **The landscape of organisations working towards sustainable transport policy across Africa is evolving fast.** Half the surveyed organisations were founded within the past ten years and almost three-quarters within the past 20 years. The ecosystem is diverse, comprising NGOs, academia, government-affiliated institutions and for-profit organisations. Southern Africa hosts more than a third of the organisations (eight of these are in South Africa), followed by Eastern (mostly in Kenya) and Western Africa (mostly in Nigeria and Côte d'Ivoire), which host around a quarter of the organisations, respectively.

2. **While many organisations work on both the mobility and energy transition in transport, the majority are focused on the mobility transition.** Approximately one-third of organisations are working on both the energy and mobility transition in transport, i.e., looking at the accessibility of shared and active modes of transport as well as the electrification and energy transition in transport. Amongst the organisations specialising in one pillar, almost twice as many focus on the mobility transition than on the energy transition.

3. **Funding is a global barrier to the growth and impact of organisations.** One of the most critical challenges for organisations is financial stability, a longstanding global issue across the sector in many countries. Limited and unstable funding hinders organisations' long-term strategic planning, talent retention and effectiveness. Almost two-thirds of organisations depend mainly on international funders such as development banks and philanthropies for their funding, and this presents an untapped opportunity for leveraging domestic and continental philanthropies and funders to prioritise organisations working in the field of sustainable transport policy.

4. **National governments are regarded as central actors for action to take place.** Government stakeholders are considered the primary target of engagement by nearly all organisations, with only one exception. Organisations aim to support policy development and reform, positioning themselves as partners in the public-led transformation of transport systems. Only about half of the organisations receive any funding from national governments. Still, governments are their main target audience. Since most organisations do not rely on government funding, this shows that they remain relatively independent.

5. **Collaboration through community building across African countries can enhance impact.** All organisations emphasised the importance of partnerships. The main drivers for collaborations include creating synergies between work programmes, combining complementary skillsets for joint projects and facilitating knowledge exchange. Partnerships with international organisations are particularly valued as they raise the profile of local actors. At the same time, organisations face challenges in engaging decision-makers and establishing long-term collaborations. Strengthening connections between organisations themselves and with potential funders, through initiatives such as a community platform for sustainable transport organisations in Africa, could amplify their collective voice, foster knowledge sharing and enhance regional coordination across the continent.

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1 | Introduction

In 2025, African countries housed a combined 1.55 billion people, of which 698 million (45 percent) were urban dwellers.[1] Due to rapid population growth and urbanisation, it is estimated that the number of urban dwellers will increase to 1.5 billion by 2050.[2]

Urban mobility is one of the key challenges in African cities, where transport systems have not been able to keep up with urban growth.[3] Thus, "popular transport" services have become unregulated and profit-oriented. Private transportation providers have emerged in most cities in African countries, serving areas where the formal public transport services do not adequately meet local transport needs.[4]

As cities expand and transport demand intensifies, the environmental cost of mobility is becoming more evident. Transport contributed nearly one-quarter (24 percent) of total CO_2 emissions in Africa in 2021, with transport emissions rising by 34 percent between 2010 and 2021, the second highest regional growth rate globally after Asia (36 percent).[5] Compared to the global average of 197 vehicles per 1 000 inhabitants, African countries have the lowest individual car ownership rates at 43 vehicles.[6] Yet, literature shows that motorisation rates between 2015 and 2020 have risen by 32 percent causing urban traffic congestion, air pollution as well as road accidents.[7] In recent years, climate action in the African transport sector has gained momentum, with an increasing number of countries committing to limiting growth of greenhouse gas (GHG) emissions in the sector. African countries account for 13 of the 36 countries that currently (August 2025) include time-bound targets for limiting transport emissions in their latest Nationally Determined Contributions (NDCs) under the Paris Agreement.

Transport authorities at the national, state and municipal levels in Africa have been investing in the mobility sector to effect measures both on the energy and mobility transition in transport – or the Avoid-Shift-Improve (ASI) framework – to support decarbonisation efforts.[8] E-mobility has been a focus of national governments, with several introducing national strategies and implementation plans recently. However, transport authorities do not work in isolation but are supported by an ecosystem of stakeholders whom they can consult and work with in their pursuit of sustainable transport. Organisational partners can play an important supporting role by generating relevant data and evidence, contributing to policy development, facilitating dialogue among diverse stakeholders, and providing technical support.[9] Their independent positioning allows them to convene a wide range of actors, including underrepresented groups, to help ensure that policies reflect diverse mobility needs. In doing so, organisations contribute to more integrated planning, strengthen accountability frameworks and support innovation and long-term visioning aligned with national priorities. Thus, this report seeks to give an overview of organisations that aim to improve the transport and mobility sector within their cities in Africa, including non-governmental organisations and think tanks, for-profit organisations, academic and non-academic research and training centres and social enterprises.

1 UN DESA – Population Division, 2024. World Population Prospects 2024. https://population.un.org/wpp/.
2 Ibid.
3 Arroyo-Arroyo et. al, 2021.
4 León, and Valverde, 2023.
5 León, and Valverde, 2023.
6 Ambunda, 2023.
7 Ibid.
8 UITP, 2023.
9 Arroyo-Arroyo, van Ryneveld, and Finn, 2024.

2 | Methodology

The mapping analysis in this report was conducted using a survey approach. The data was collected directly from representatives of the concerned organisations. 82 organisations were invited to fill out an online survey in the form of a questionnaire.[10] The survey was conducted over the period from 6 February to 5 March 2025. The identification of relevant organisations to invite relied primarily on three channels:

- A stakeholders database identified by Agora Verkehrswende and GIZ.
- A list of organisations recommended by Transport for Cairo (TfC).
- Additionally, TfC consulted regional experts to identify further organisations, particularly those in the academic sector and those based in French- and Portuguese-speaking countries in Africa.

Subsequently, 51 organisations from 17 countries in Africa took part in the survey. Out of these 32 represented organisations doing independent policy work for sustainable transport.

The definition of a think tank or comparable civil society organisation working on sustainable transport remains subject to debate, as there is no global legal definition of a think tank or comparable type of organisation. Our intention has been to identify African organisations which aim to guide policymaking towards sustainable transport based on research and analysis grounded in evidence. We are convinced of the added value these organisations can bring in supporting political processes, rather than individual projects, and thereby accelerate and scale action towards sustainable transport, using the lever of political decision-making. This further strengthens the capacity of decision-makers to implement evidence-based policies in the country's best interest.

In addition, amongst the countries surveyed, there are a multitude of organisations which do not classify as traditional think tanks or comparable, however, they engage significantly in research, analysis and policy advice. The fact that civil society is often extremely limited in their scope of action, whether by financial constraints, political pressure and a lack of trust in decision-makers or a generally challenging environment for civil society, typified by such elements as limited access to higher education, limited access to data, or a limited public sphere.

In consequence, we have tried selecting organisations which are engaged in "think-tank work", i.e., nonpartisan and evidence-based research, analysis, information and advice aimed at political decision-makers – either direct or through the public (advocacy). This implies that organisations do not exclusively focus on what we summarise under the term "think-tank work" but also may conduct in parallel other work. Thus, some organisations included in this report are for-profit, international with a local presence or universities.

Initially, having collected data from the 51 organisations that responded to the survey, we excluded organisations for which we saw a potential conflict of interest, for example e-bus manufacturers engaged in the market, or those where, upon closer examination, the think-tank work only represented a negligible portion of their work. This was done through desk research and the analysis of responses given by organisations.[11]

The participation of Transport for Cairo as the consultant for the survey was critically discussed. The organisation fulfils the criteria laid out above. Considering the research and advisory work that the company is conducting – and in order not to penalise– it was agreed to maintain TfC in the sample. The responses by TfC were singled-out and reviewed by Agora Verkehrswende and after ruling out any potential conflict with the intentions of this analysis, or undue benefit to TfC, they were approved.

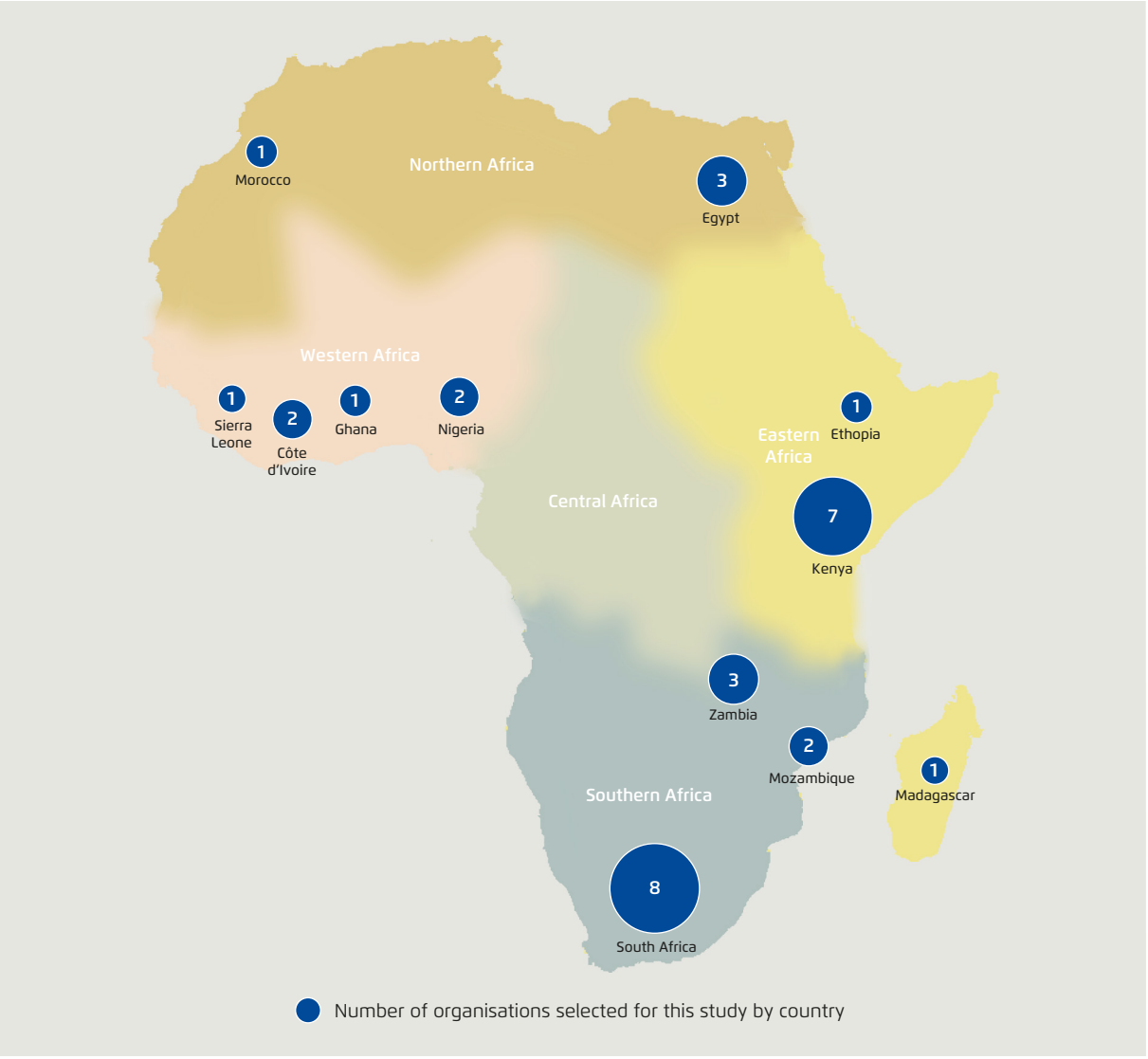
The definition of *African* organisations was made based on the existence of an entity with its own operations in an African country, in terms of work and physical location of operations. Organisations were not required to exist independently of an international umbrella organisation but needed to have a credible activity in one or more countries in Africa.

10 The online survey included the GDPR statement, and organisations have agreed to share details in the annexe.

11 This selection was conducted internally under dual control and based on the laid-out criteria, without regard to the potential existence of preferences for the work of one or another of the selected organisations.

3 | Overview of organisations

Distribution of surveyed organisations — Figure 1



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The 32 organisations selected are distributed across four African regions[12]: With more than a third of the total (13/32), Southern Africa hosts by far the most organisations in this sample. Eastern and Western African countries follow with eight in Kenya and Ethiopia and six organisations in Nigeria, Ghana, Côte d'Ivoire, Sierra Leone and Senegal, respectively. North Africa accounts for four organisations with one in Morocco and three in Egypt, while no sustainable transport policy organisation qualified from Central African countries. South Africa alone is home to eight organisations, followed by Kenya with seven and Egypt and Zambia with three organisations each.

Among the 32 organisations, only five are for-profit organisations. 11 organisations are registered as NGOs,

12 African sub-regions mentioned in the report are based on the country classifications made by the African Union: https://au.int/en/member_states/countryprofiles2

Surveyed Organisations — Table 1

	Organisation name	Country	Year	Type*	Primary focus
Non-Profit Organisations					
1.	Africa E-Mobility Alliance	Kenya	2020	NGO	Energy transition
2.	C40 Cities	South Africa	2005	NGO	Mobility transition
3.	Center of Mobility Research – Ain Shams University	Egypt	2022	University	Mobility transition
4.	Centre for Transport Studies – University of Cape Town	South Africa	2007	University	Mobility transition
5.	Chiyambi Centre for Energy Transitions	Zambia	2022	Company Limited by Guarantee	Energy transition
6.	Clean Technology Hub	Nigeria	2016	Social Enterprise	Energy transition
7.	CODATU Regional Office	Madagascar	1981	NGO	Energy and mobility transition
8.	Critical Mass Nairobi	Kenya	2014	Company Limited by Guarantee	Mobility transition
9.	Data Transport	Côte d'Ivoire	2019	NGO	Energy and mobility transition
10.	The Electric Mission	South Africa	2020	Other	Energy and mobility transition
11.	Flone Initiative	Kenya	2013	Charitable Trust	Energy and mobility transition
12.	Institute for Transportation and Development Policy (ITDP)	Kenya	1985	NGO	Energy and mobility transition
13.	School of Transport and Logistics – Lagos State University	Nigeria	1983	Government	Not specified
14.	Network of African Science Academies (NASAC)	Kenya	2001	NGO	Energy and mobility transition
15.	Observatório da Mobilidade e de Transporte de Moçambique (OMT) // Observatory of Mobility and Transport of Mozambique	Mozambique	2019	NGO	Mobility transition
16.	Organisation Internationale de l'Innovation pour des Territoires et Industries Durables (OIITID)	Côte d'Ivoire	2021	NGO	Not specified
17.	Pikala	Morocco	2016	Social Enterprise	Mobility transition
18.	Regional Transport Research and Education Centre Kumasi (TRECK), KNUST	Ghana	2019	University	Not specified
19.	Sierra Leone Urban Research Centre	Sierra Leone	2015	Company Limited by Guarantee	Mobility transition
20.	Southern Transitions	South Africa	2022	NGO	Energy and mobility transition
21.	Electric Mobility Lab – Stellenbosch University	South Africa	1918	University	Energy transition
22.	Energy Research Centre – Strathmore University	Kenya	1961	Charitable Trust	Not specified
23.	uYilo e-Mobility Programme (uYilo)	South Africa	2013	University	Energy transition

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Surveyed Organisations Table 1

	Organisation name	Country	Year	Type*	Primary focus
24.	World Resources Institute (WRI) Africa Regional Office	Ethiopia	1982	International Organisation	Energy and mobility transition
25.	Young Urbanists NPC	South Africa	2013	NGO	Mobility transition
26.	Zambia Institute for Policy Analysis and Research	Zambia	2006	Government	Energy and mobility transition
27.	Zambian Electric Mobility Innovation Alliance (ZEMIA)	Zambia	2022	NGO	Energy transition
	For-Profit Organisations				
28.	Africa Mobility Research Hub	Kenya	2025	Private Limited Company	Energy and mobility transition
29.	Instituto Superior de Transportes e Comunicações (ISUTC)	Mozambique	2000	Semi-Government	Not specified
30.	Organisation Development Africa (ODA) (Pty) Ltd	South Africa	1999	Private Limited Company	Mobility transition
31.	The NADA Foundation for Safer Egyptian Roads	Egypt	2014	NGO	Mobility transition
32.	Transport for Cairo (TfC)	Egypt	2016	Private Limited Company	Mobility transition

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followed by different forms of not-for-profit enterprises (8/32) and university-affiliated organisations (5/32). A detailed overview of these organisations, distinguished by non-profit and for-profit organisations, is presented in the following table, including the country of registration, year of establishment and type of legal entity.

3.1 General characteristics

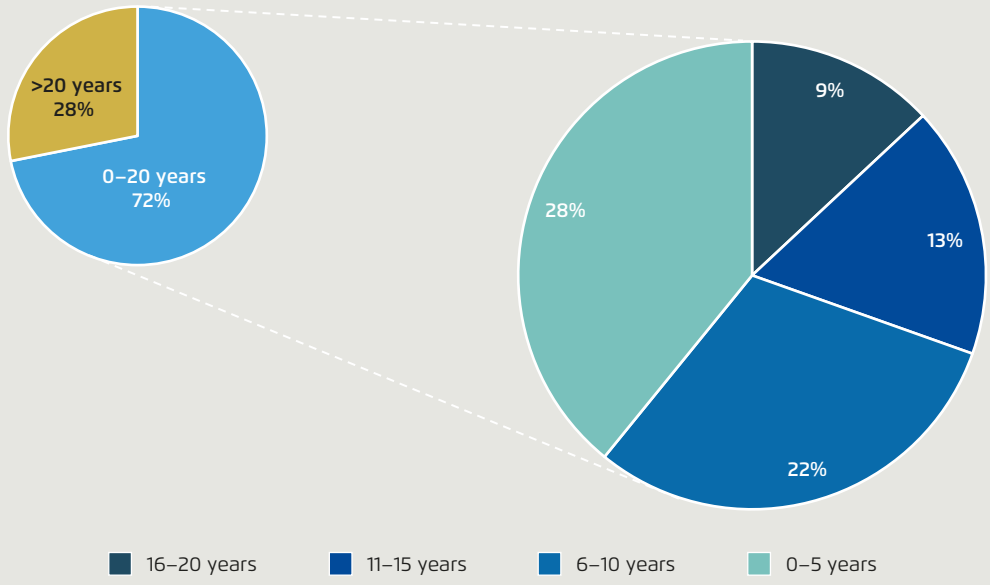
The field of sustainable transport policy organisations in Africa is new and evolving: Half of the surveyed organisations (16/32) were founded within the past ten years and almost three-quarters (23/32) within the past 20 years. Since 2020 alone, nine organisations were founded.

A closer look at the distribution of organisations by the number of employees reveals a logical pattern: recently established organisations tend to have smaller teams, while long-established ones are more likely to have larger-sized teams.

Of all organisations surveyed, seven had more than 15 employees. Only two of these were founded within the past ten years.

English is used as a working language by almost all organisations surveyed (29/32). The fact that this survey was conducted in English may have biased the result. More than half the organisations (17/32) stated using one working language only, either English, French or Portuguese. The second-most used language (respondents were able to choose more than one answer) is French (8/32), followed by Arabic (5/32), mostly in North Africa, and Portuguese (4/32), mainly in Mozambique. Two organisations named Swahili as a working language, and one mentioned Afrikaans. The strong representation of English as well as further linguae francae is an advantage in the creation of cross-border links between organisations.

Years of Operation Figure 2



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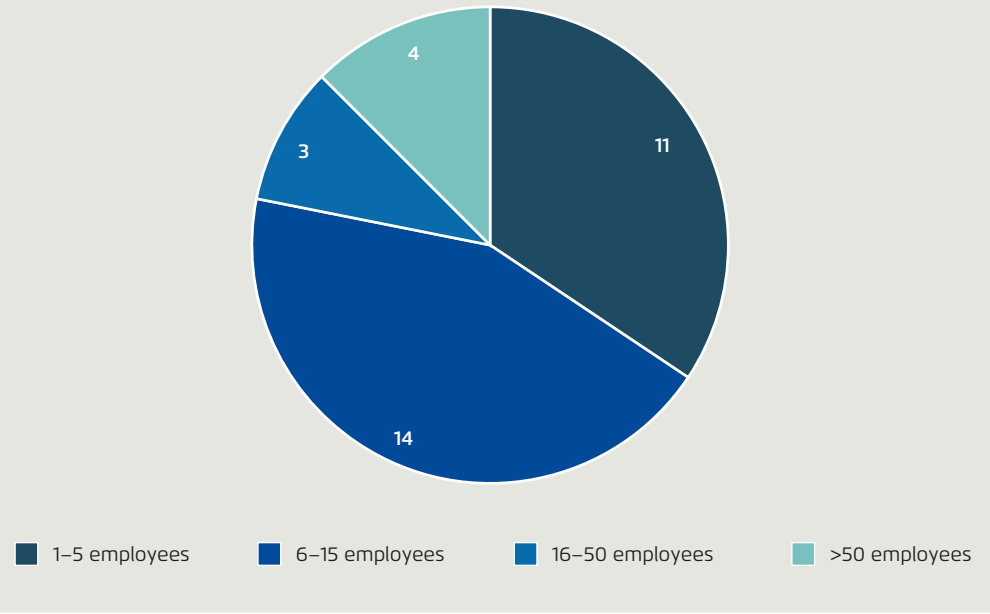
Organisations by Number of Employees (FTE) Figure 3



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3.2 Drivers and purpose

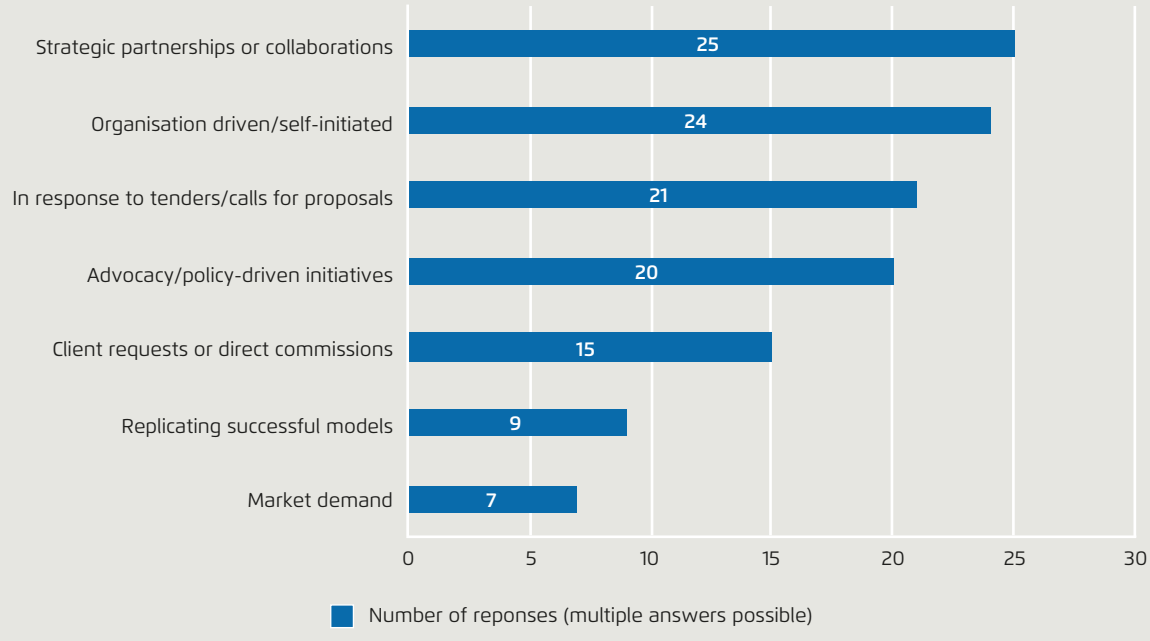
Organisations were asked in an open-answer format to introduce the purpose of their work. The most common aspects mentioned were the following:

- Half the organisations explicitly refer to combatting climate change as their organisations' purpose (16/32).
- Almost half of the organisations (13/32) mention economic development and job creation as objectives for their work.
- Seven organisations refer to the health and well-being benefits of sustainable transport as the purpose of their activity.
- Half of the organisations (16/32) refer to aspects of just transition as the purpose of their activity. Safety is mentioned by 11 organisations. Six organisations mention aspects of gender equity, women's participation in transport and inclusivity – with the latter term being most frequent.
- Five organisations refer to transformative change in their mission statements, highlighting the ambition and intention of these organisations.

When asked about how the organisation decides which activities or projects to pursue, responses showed that most organisations (25/32) prioritise activities and projects based on strategic partnerships or collaborations, followed by self-initiated activities (24/32) and in response to tenders and calls for proposals (21/32)[13]. The findings suggest sustainable transport organisations' activities are more value-driven than client-driven. Another hypothesis implies that, as the sector is nascent, (client-)demand or tenders are still rare and organisations lead the way in pushing forward action.

13 The "other" text field was used by two respondents to indicate "government needs" and "recent research trends".

Drivers of activity — Figure 4



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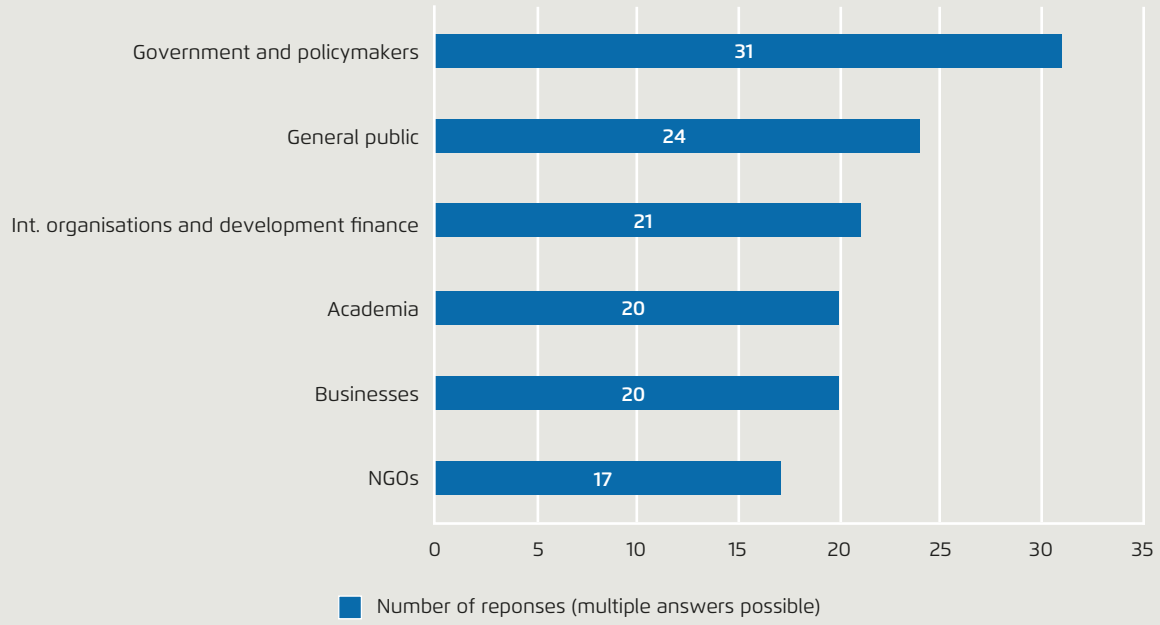
3.3 Target groups

Virtually all (31/32) surveyed transport organisations target government actors and policymakers as their main audience and beneficiaries, followed by the public (24/32) and international organisations and development finance institutions (21/32). Despite capacity constraints in public institutions in some African countries, the results demonstrate that organisations identify them as the most pertinent actors. Furthermore, the results show the organisations surveyed target diverse groups, hinting towards a hedging strategy and/or the fact that most are founded recently and are in an alignment phase.

Target Groups — Figure 5



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4 | Thematic priorities

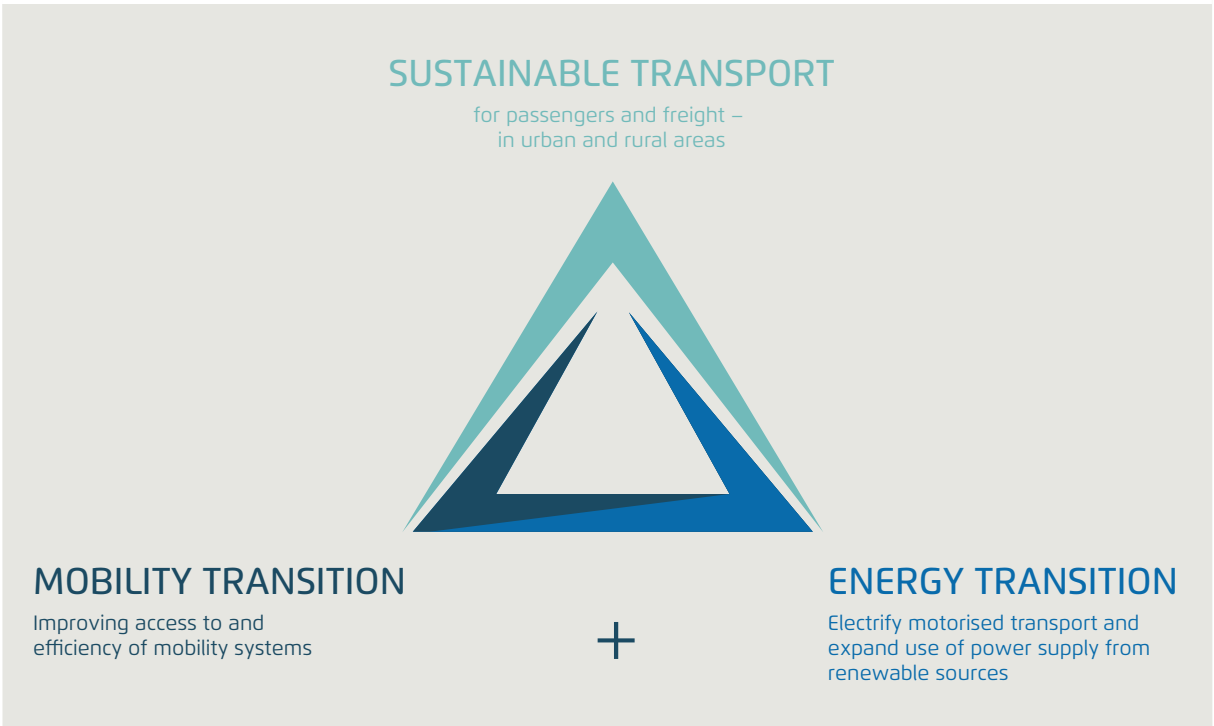
There is no standard approach for categorising transport organisations into disciplines of sustainable transport. We approached the subject from two perspectives: firstly, based on the organisation's mission statement and desk research, they were then classified into the fields of mobility and energy transition (see section 4.1). Secondly, organisations indicated their main work streams (see section 4.2), including the topical areas of focus and modal focus.

4.1 Mobility Transition and Energy Transition

Achieving sustainable transport requires making the transport system more accessible and efficient as well as decarbonising the energy needed to run it (see Figure 6): on the one hand, improving access to shared and active modes of transport, including bundling travel and discouraging unnecessary trips (mobility transition or avoid and shift). On the other hand, electrifying motorised transport and decarbonising the energy supply, where needed also for fuels (energy transition or improve). Only if we pursue both strategies will we be able to create a truly sustainable transport system.

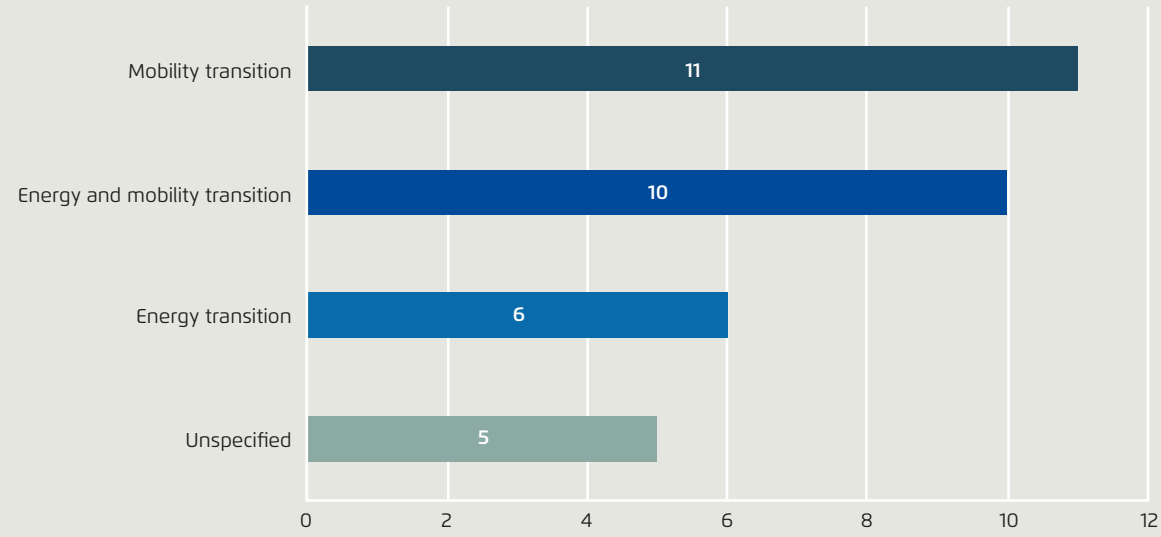
Based on their mission statements, we classified the organisations using both categories (see Figure 7). In this sample, we found almost twice as many organisations focusing on the mobility transition (11/32) as on the energy transition (6/32) – with another 11 organisations focusing on both. This could be attributed to the fact that the accessibility of transport systems has been a key priority in many African countries. In consequence, two-thirds of organisations are focusing on mobility transition – either exclusively or in combination with energy transition (22/32) – while only a little more than half of the organisations (17/32) focus on energy transition either exclusively or combined with mobility transition.

The geometry of the transport transformation — Figure 6



Agora Verkehrswende and GIZ (2025) | Source: Agora Verkehrswende and GIZ (2023): Leapfrogging to Sustainable Transport in Africa. Twelve Insights into the Continent's Sector Transformation.

Classification of Organisations: energy vs mobility transition Figure 7



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4.2 Main work streams

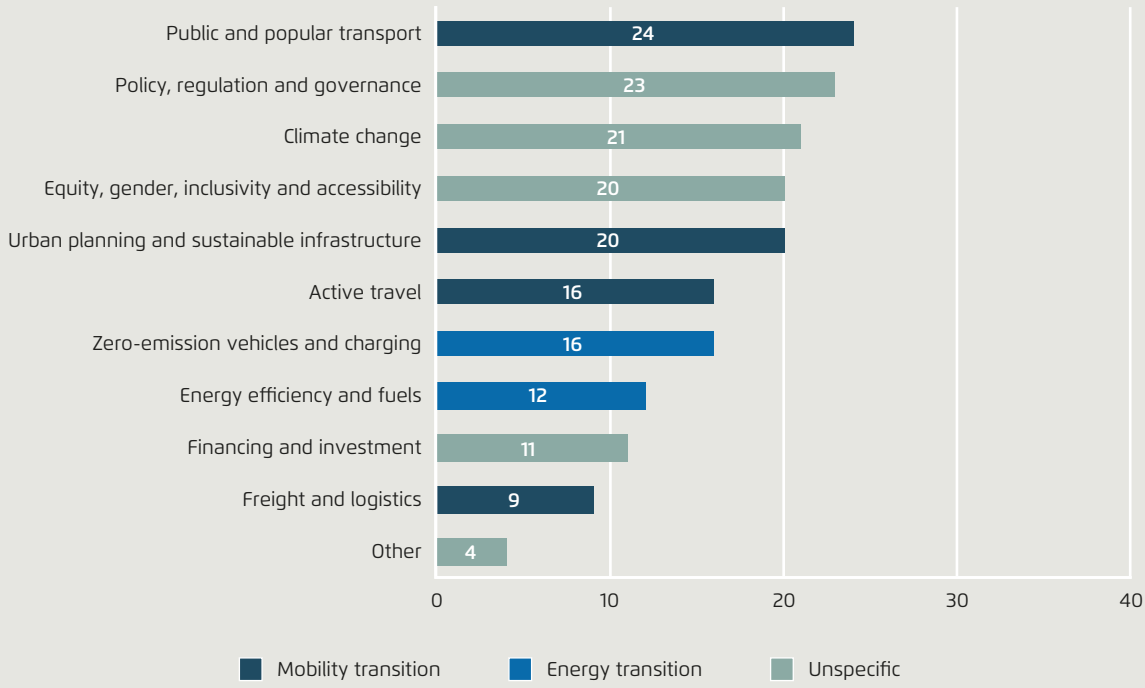
When asked about their main areas of work (see Figure 8), three quarters (24/32) of organisations indicated to focus on the public and popular transport sector. The importance of public institutions and governments shown in chapter 3.3 is equally reflected in organisations' thematic focus: more than two-thirds (23/32) of respondents named policy, regulation and governance as one of the main foci of their work, followed by climate change (21/32 respondents), and equity, gender, inclusivity and accessibility (20/32 respondents). The result does not only indicate the importance of these topics for the organisations in 17 of the African countries surveyed but also highlights how these challenges require action in parallel.

Half of organisations cite Zero-Emission Vehicles (ZEVs) and charging infrastructure as one of their main fields of expertise (16/32). This highlights the growing importance of electric mobility in several countries in Africa, not only from the perspective of climate change mitigation but also economic growth and sustainable development. In contrast, the field of energy efficiency and fuels , focusing primarily on improvements in the existing Internal Combustion Engine (ICE) fleets, was named by more than a third of the respondents (12/32).

Less than half as many organisations named finance as a focus compared to those that named policy (23 compared to 11): this may point to a gap in the work streams as organisations mostly focus on legislative policy work and less on policies in financing and investment options. Less than a third (9/32) of organisations cited freight as one of their main topics of focus. In a follow-up question, of these nine organisations, three stated they also work on long-distance freight transport. On the other hand, active travel is named by half of the organisations (16/32), reflecting its importance in the modal share of many African countries and the focus on accessibility, i.e., mobility transition.

Correlating the responses of organisations between variables, we can ascertain further insights on the relation of topics to each other. However, it remains important to note the limits of correlation in order not to confound it with causalities:

Work streams of organisations Figure 8



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- Of those citing climate change as the focus of their work, close to two-thirds (13/21) work on zero-emission vehicles, three-quarters (16/21) on public and popular transport and close to half (10/21) on active mobility.
- Almost all organisations working on ZEVs and charging infrastructure indicate also working on formal public transport (14/16), most also work on policy (11/16) and half also on financing (8/16).
- Less than a third of organisations focusing on E-mobility (5/16) include freight in their field of work.
- Public and popular transport is highly correlated with urban planning and sustainable infrastructure, with more than two-thirds (17/24) of those organisations working on the former topic also working on the latter.
- The same is true for gender and inclusivity, which two-thirds (16/24) of organisations working on public and popular transport focus on. More than half (14/24) of organisations working on public and popular transport also state working on electric vehicles and charging.

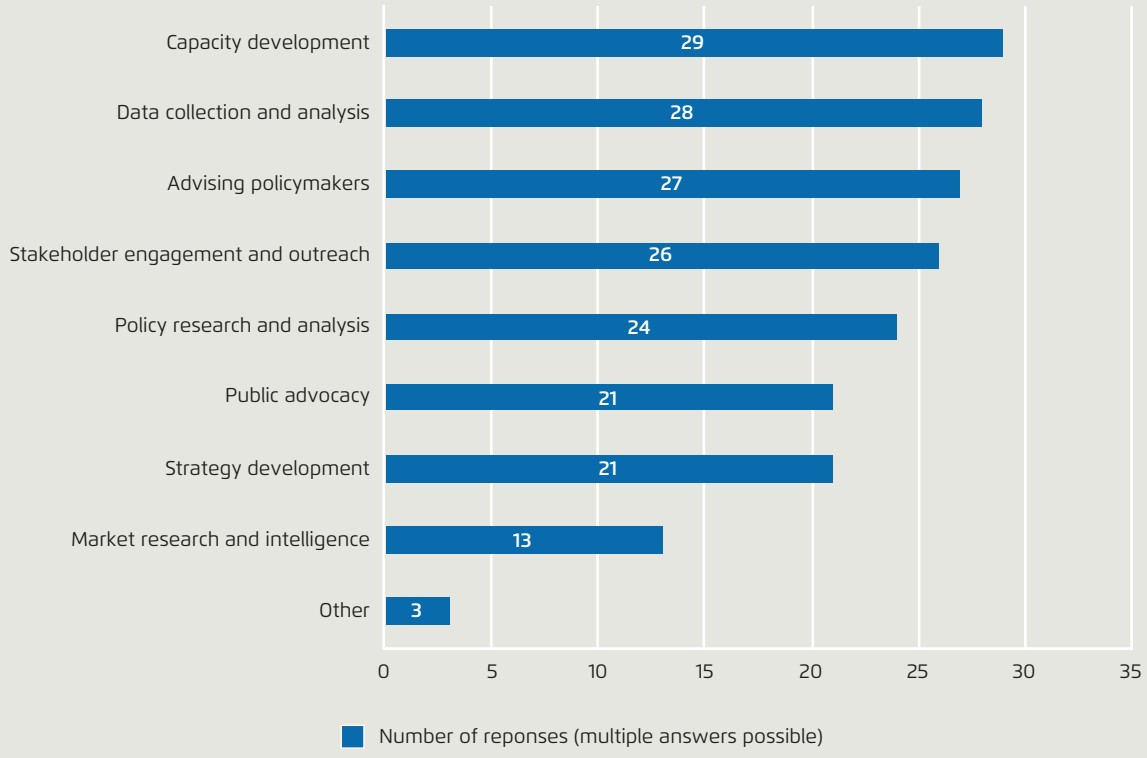
5 | Operational models

The surveyed organisations are committed to supporting policy decision-makers, but their effectiveness is constrained by funding challenges and a strong reliance on international funding. Capacity development and data collection are the most common activities conducted by nine out of ten surveyed organisations (see figure 9). Advising policymakers as a key mission is cited by all but five organisations (27/32), followed by relying on public advocacy (21/32). It is interesting to note that although organisations have less focus on financing and investment options in their work streams, 13 organisations mentioned market research and intelligence as part of their main activities – a field of activity traditionally beyond the scope of policy-oriented organisations.

5.1 Sources of funding

International organisations and institutions are the most common funders of the surveyed organisations' work. Close to two-thirds (20/32) of organisations surveyed indicate that their activities are funded via international organisations and international development banks. Private donors, i.e., philanthropies, foundations or initiatives, both national and international, funded more than half of the surveyed organisations (18/32). Half the organisations (16/32) indicate receiving funding directly from government entities, either local or international development finance institutions, followed by academia as a funding source (11/32). Nine organisations receive major funding from private businesses while six cite (other) NGOs

Main activities — Figure 9



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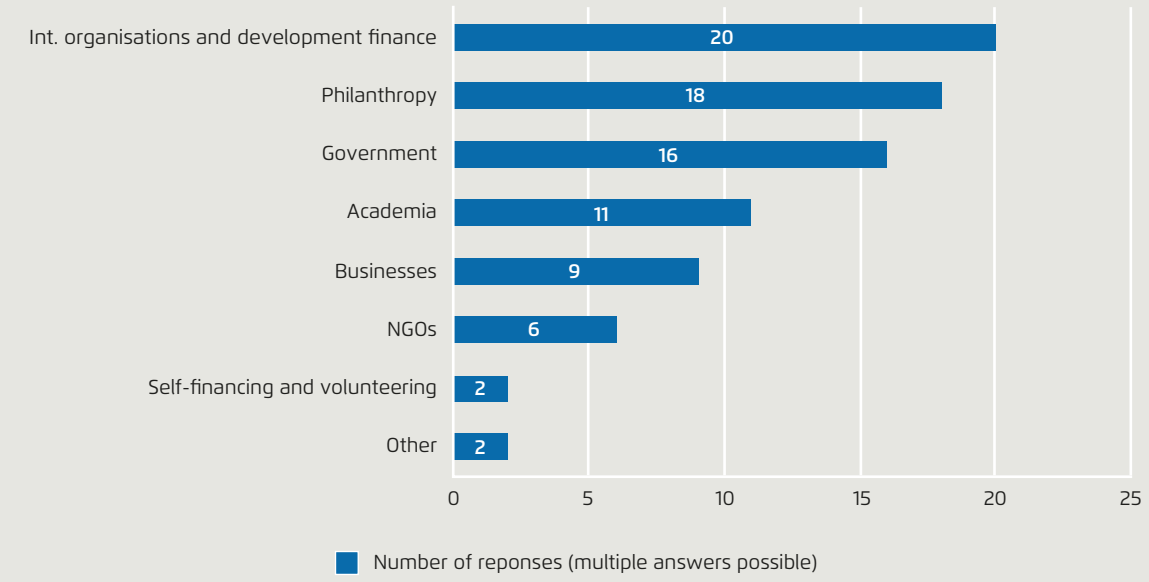
Financing and funding sources Figure 10



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as a major funding source. Two organisations are mainly self-funded with their own resources and rely on volunteers. However, one of these organisations highlighted that this model is not sustainable in the long run. The two organisations indicating "other" channels are both university-affiliated and refer to academia-specific competitive funding models. Government entities are the primary target group for activities funded by international organisations and private donors. When correlating results from funding channels and target groups, all organisations funded by international organisations and all organisations funded by private donors ranked government entities as their primary target group.

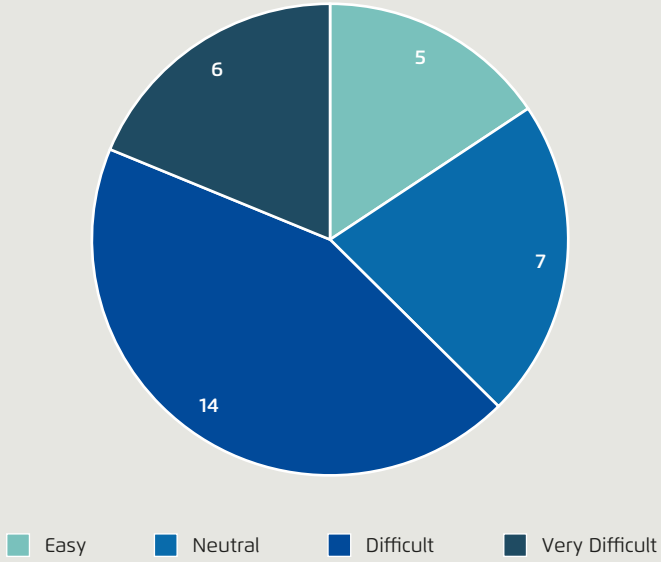
5.2 Access to funding

Access to funding remains a barrier for most organisations surveyed, much like similar organisations in other parts of the world. Almost two-thirds of organisations (20/32) find it difficult or very difficult to attract funding. Perhaps surprisingly, for-profit organisations have found it harder to attract funding than non-profit ones: none of the five for-profit organisations in this sample have found it easy to attract funding, with three organisations describing it as very difficult and two as difficult.

Our survey results also show that the relationship between organisational type and perceived difficulty to access funding shows a clear contrast between for-profit and non-profit entities. Overall, when applying a weighted score (from easy=1 to very difficult=4), non-profits rate the ease of access to funding between neutral and difficult (2.48), whereas for-profits rate it between difficult and very difficult (3.6).

Recent trends show that international development funders are more willing to work with non-profit organisations. This can be an obstacle for new organisations: Faced with difficulties to register as non-profits and generating initial revenue, some opt to register as for-profit companies, barring them later from eligibility to international grants. Changing the legal status at a later stage then may prove difficult depending on the regulatory context and the structure of the organisation. The greater perceived difficulty of non-profits in attracting

Overall Ease of Funding Figure 11



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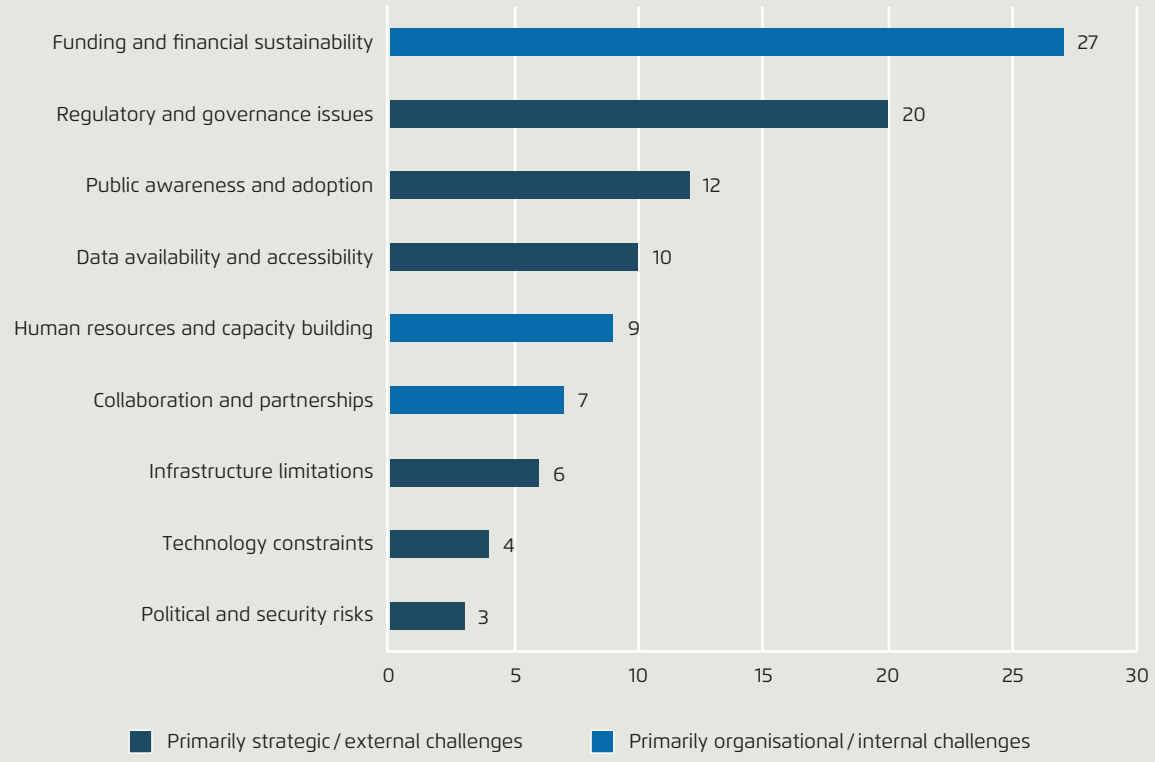
funding may also be attributed to different funding channels and project roles: for-profit organisations tend to work on a (short-term) project-by-project basis as service providers, thus often needing to secure projects and project funding in shorter timeframes. In contrast, some non-profits, such as universities or international organisations, often receive dedicated funding from governmental or non-governmental sponsors, secured via long-term funds and agreements. This, of course, is not true for all non-profit organisations, with many, especially grassroots initiatives, struggling to attract basic funding.

6 | Main challenges

Key areas of challenges — Figure 12



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Most surveyed organisations highlighted challenges across nine key themes, revealing both internal, i.e., organisational, and external, i.e., strategic, challenges. The chart below (Figure 13) displays the challenges most mentioned by organisations via an open-ended question, separated by primarily organisational and then primarily strategic challenges.

6.1 Organisational challenges

- **Funding and financial sustainability has been by far the most cited issue**. This was mentioned by all but five surveyed organisations (27/32): we categorised this as an organisational challenge to establish a sustainable model of operations and attract funding. However, the ease of accessing funding is also dependent on external factors, such as the general availability of philanthropic funds. In consequence, organisations face financial constraints that affect operational sustainability, leading to difficulties in maintaining and expanding programmes, investing in necessary facilities and retaining skilled personnel. This results in a strong reliance on volunteers, impacting the consistency and quality of programme delivery. Additionally, funding deficits limit access to reliable data and advanced technologies, both crucial for developing evidence-based policies solutions and informed decision-making.

> *"The main challenge is the inadequate funding allocated for disseminating and communicating research findings and recommendations [which] makes it [...] difficult to influence policy."*
> Network of African Science Academics (NASAC)

- **Human resources and capacity building was highlighted as a challenge by less than a third (9/32) of organisations.** Organisations face difficulties in attracting and retaining skilled professionals, particularly in specialised areas such as sustainable transport and electric mobility. A reliance on volunteers, while valuable, often proves unsustainable for long-term project implementation. Organisations also face gaps in technical expertise and need better access to knowledge on emerging technologies. Additionally, bridging the gap between theoretical knowledge and real-world application remains a challenge, limiting the effectiveness of capacity-building efforts. Capacity limitations also constrain the ability of organisations to engage partnerships with international organisations.

> *"We know we are too small […] for them, but we have a great willingness."*
> Organisation Internationale de l'Innovation pour des Territoires et Industries Durables (OIITID)

- **Less than a fourth of organisations (7/32) face challenges in collaborations and partnerships:** some ascertain difficulties in finding partners due to a perceived lack of adequate matching organisations. Others experience difficulties in existing partnerships: misaligned stakeholder priorities, difficulties in securing long-term cooperation, and limited access to partners often delay project implementation. In addition, a gap exists between academic research and real-world transport solutions. Since both academic and non-academic organisations face difficulties in translating theoretical frameworks into actionable strategies. This is due to limited cooperation between research institutions and industry stakeholders. Furthermore, some organisations expressed a strong willingness to engage with international agencies but struggled due to their current scale or lack of visibility. Strengthening global networks and fostering cross-sector partnerships can help local initiatives gain the support needed to implement impactful, sustainable transport projects. Addressing these challenges requires a more structured approach to stakeholder engagement, increased support for cooperative initiatives, and improved access to both financial and technical resources. Strengthening partnerships at all levels – local, national, and international – will be critical for accelerating the adoption of sustainable transport solutions.

> *"[There is] limited collaboration between transport operators, advocacy groups, and policymakers in driving systematic change, and [thus] we see weak policy enforcement."*
> Flone Initiative

6.2 Strategic challenges:

- **As named by almost two-thirds (20/32) of organisations, regulatory and governance issues rank as the second significant external challenge.** Many organisations pointed to the absence of clear regulatory frameworks, frequent policy shifts, and inconsistent enforcement as barriers to implementing sustainable transport policies and solutions.

> *„The regulatory environment can also pose challenges, as outdated policies may not fully support emerging sustainable transport solutions."*
> Electric Mission

- **More than a third (12/32) of respondents highlight the lack of public awareness and adoption of sustainable transport modes as a barrier.** Many organisations struggle to shift public perception and encourage behavioural change, particularly in growing urban communities where private vehicle ownership is seen as a symbol of success and status in society. Despite some improvements in the availability of sustainable transport modes, for example, public bus services, the limited amount of awareness campaigns and engagement efforts delay widespread adoption of these modes.

> *"Raising public awareness and changing perceptions towards sustainable transport options is essential for gaining community support and encouraging behaviour change."*
> Sierra Leone Urban Research Center (SLURC)

- **Limited availability of transport data is mentioned as a barrier by close to a third of organisations (10/32).** Limited access to reliable transport data, including vehicle usage, energy consumption, mobility patterns and the number of ZEVs on the road, affects decision-making, the accuracy of simulations, and long-term planning.

> *„One of the main challenges […] in advancing sustainable transport is the availability and accessibility of data, which limits research and evidence-based decision-making."*
> Instituto Superior de Transportes e Comunicações (ISUTC)

- **Less than a fifth of organisations (6/32) highlight that infrastructure limitations remain a critical challenge.** This is especially the case for the deployment of sustainable transport services and solutions, particularly where inadequate facilities set back integration with existing systems. Many governments in Africa continue to prioritise car-centric projects such as the construction of highways and roads over investments in active mobility and public transport. In this context, it may prove difficult for organisations to advocate allocating more budgetary resources in favour of sustainable transport solutions.

> *„Many governments in Africa are still spending the bulk of their transport budgets on car-centric infrastructure, including urban highways, flyovers, and road widenings. We need to see greater investment in active mobility and public transport."*
> Institute for Transportation and Development Policy (ITDP)

- **Only an eighth of organisations (4/32) highlighted the difficulty of integrating new technologies into existing transport systems**. This is more pronounced in regions where popular transport systems, i.e., somewhat informal services, dominate. Furthermore, some organisations pointed to inadequate internet connectivity, limited data repositories, and inconsistent access to smart mobility tools as obstacles to effective implementation.

> *„Access to advanced technologies and innovative solutions is necessary for developing efficient and sustainable transport systems."*
> Sierra Leone Urban Research Center (SLURC)

- **Political and security risks were mentioned by only three organisations.** The primary issue with these risks is uncertainties in policy, governance, and overall stability in the cities and countries they operate in. Institutional fragmentation outdated regulatory frameworks and political interference further complicate urban mobility systems, often leading to inefficiencies and a lack of coordination.

> *„Risks associated with the countries and cities we work with tend to delay the achievement of projects, introduce uncertainties, and sometimes jeopardise the projects themselves."*
> CODATU

7 | Partnerships and collaboration

Following the questions on the capacities and challenges facing the surveyed organisations, the respondents were further asked to share insights on the types of partnerships and collaborations that are most valuable to the organisations. The responses indicate several findings ranging from the concrete values derived from partnerships and collaborations to the profiles of the desired partners.

Mentioned by little more than two-thirds of organisations (22/32), partnerships with government agencies at different levels (local, state and national level) are the most valued, as they allow for shaping policies, incentives and general transport planning. Working with the public sector also gives organisations more exposure, the ability to work on projects with tangible impacts and may also improve their chances of accessing funding.

Partnerships with the private sector, both locally and internationally, were mentioned by more than half of the organisations (17/32). These partnerships are valued as they offer practical insights into the industry, technical expertise, promise innovative solutions, and may enable access to new partners and opportunities.

Partnerships with research and educational institutions, both academic and non-academic, were also highly valued by close to half of the organisations (14/32). These partnerships may open research-based opportunities via consortia and enable an exchange with faculty members and students for improved knowledge-sharing, especially with regard to learning about new research methodologies.

A third of respondents (11/32) mentioned partnerships with international development organisations, including intergovernmental organisations and development banks. Partnerships with these actors are particularly sought after, as these actors are thought

Overview of cooperation and partnership gains — Table 2

Partners and possible partnership gains	Mentions
Government agencies • Aligning initiatives and securing political support • Influencing policy and decision-making • Increasing legitimacy of work and exposure • Facilitating access to funding, including from international development agencies	22/32
Private sector companies • Offering practical insights into industry needs and trends • Enabling access to technology and infrastructure • Enabling access to new partners • For social enterprises, demonstrating market viability, uptake, and interest	17/32
Research and educational institutions • Supporting knowledge-sharing and joint research via faculty and student exchanges • Providing access to resources, expertise, research and innovative research methodologies • Contributing to data-driven decision-making and impactful programme development	14/32
International development organisations and funders • Providing access to funding • Providing access to technical expertise and global best practices in sustainable mobility • Enhancing organisational credibility and legitimacy • Improving organisational reach through on-the-ground access	11/32
Associations and civil society organisations • Providing insight into experiences, knowledge and needs of communities • Facilitating grassroots engagement and trust-building • Supporting the implementation of community-based initiatives • Supporting outreach, advocacy and raising awareness	8/32

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to have a more direct connection to decision-makers. Furthermore, international development agencies may provide the necessary funding for the sustainable transport organisations to sustain and increase their activities. Partnerships with associations and civil society organisations were named by a quarter of organisations (8/32).

Table 2 provides an overview of the added value that sustainable transport organisations either gained and/or are looking to gain from different partnerships and collaborations.

Some respondents emphasised the benefits of multi-stakeholder and multidisciplinary partnerships. Noting that having diversity, i.e., diverse perspectives, resources and expertise, further facilitates attaining a comprehensive overview of complex challenges and co-creating holistic and scalable solutions. Recently established organisations are especially keen to collaborate to grow their network, work and impact in the field of sustainable transport. One respondent praised the ambition of this study, noting that it may support improving coordination between international development agencies while avoiding the duplication of efforts:

> ***"There is an acknowledged need for action and capacitation in the area of urban mobility in the Global South, however, [there is] little overview of the needs, actions and projects of the various stakeholders involved and lack of coordination. This often results in duplication of efforts, lack of capitalization, etc... in a context of scarce forces and resources. Maybe there could be room for a global coordination to join efforts."***
> CODATU

8 | Outlook: Community building with a common vision

Acting collectively can strengthen the policy influence of these organisations, boost recognition and potentially attract increased funding opportunities. Collaborating as a network can also reap "collaborative advantages", referring to the added value created when different actors work together to achieve outcomes that would not be possible individually.[14] Current examples of such networks in the sector on a continental level only include public sector organisations. For example, the International Association of Public Transport (UITP), with members typically consisting of public transport authorities (PTAs) and public transport operators (PTOs), as well as the African Association of Urban Mobility Authorities (AAUMA), a regional platform under the framework of the Africa Transport Policy Program (SSATP) supported by the World Bank.

Lessons can also be drawn from non-governmental networks in the energy sector. For example, the International Network of Energy Transition Think Tanks (INETTT) is a global alliance of independent, non-profit institutes committed to advancing equitable and effective energy transitions aligned with the Paris Agreement and the UN Sustainable Development Goals. Established in 2020, INETTT facilitates international collaboration through rigorous, evidence-based research and policy development. By fostering dialogue, sharing expertise, and tailoring solutions to diverse socio-political and energy contexts, INETTT strengthens strategic cooperation and promotes a just transition to climate neutrality. However, there remains a gap when it comes to structured cooperation among non-governmental transport actors in Africa. This is particularly relevant given almost all surveyed organisations identified government representatives as the primary target group of their activities and services. Thus, such a network could support their efforts to complement government plans and strategies more effectively.

A growing number of organisations are working to address the challenges in sustainable transport in Africa. The majority are focused on the public and popular transport sectors. These organisations act as knowledge intermediaries, partners and implementers for governments in the sustainable transport sector. However, scaling the impact of organisations working in this sector remains constrained by a persistent lack of funding, which is a key barrier that threatens their sustainability and reach. This presents a missed opportunity for policymakers and funders to harness valuable implementation partners. Similarly, it also underscores the urgency of targeted support that would strengthen these actors' institutional capacity.

Our survey highlights that most organisations maintain a strong orientation toward supporting government objectives, tailoring their interventions to align with policy frameworks and public sector needs. Yet, structured collaboration across the sector remains limited. Building a pan-African community of sustainable transport organisations could bridge this gap. Such a community could offer a platform for coordinated action, pooled resources and shared learning. This would enhance the sector's collective voice, facilitate more coherent engagement with governments and create synergistic relationships with donor and development agencies.

14 Stibbe, and Prescott, 2020.

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Agora Verkehrswende is a think tank for climate-neutral mobility. In dialog with politics, business, science and civil society, the non-profit organization works to reduce greenhouse gas emissions in the transport sector to zero. To this end, the team develops scientifically based strategies and proposed solutions.

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