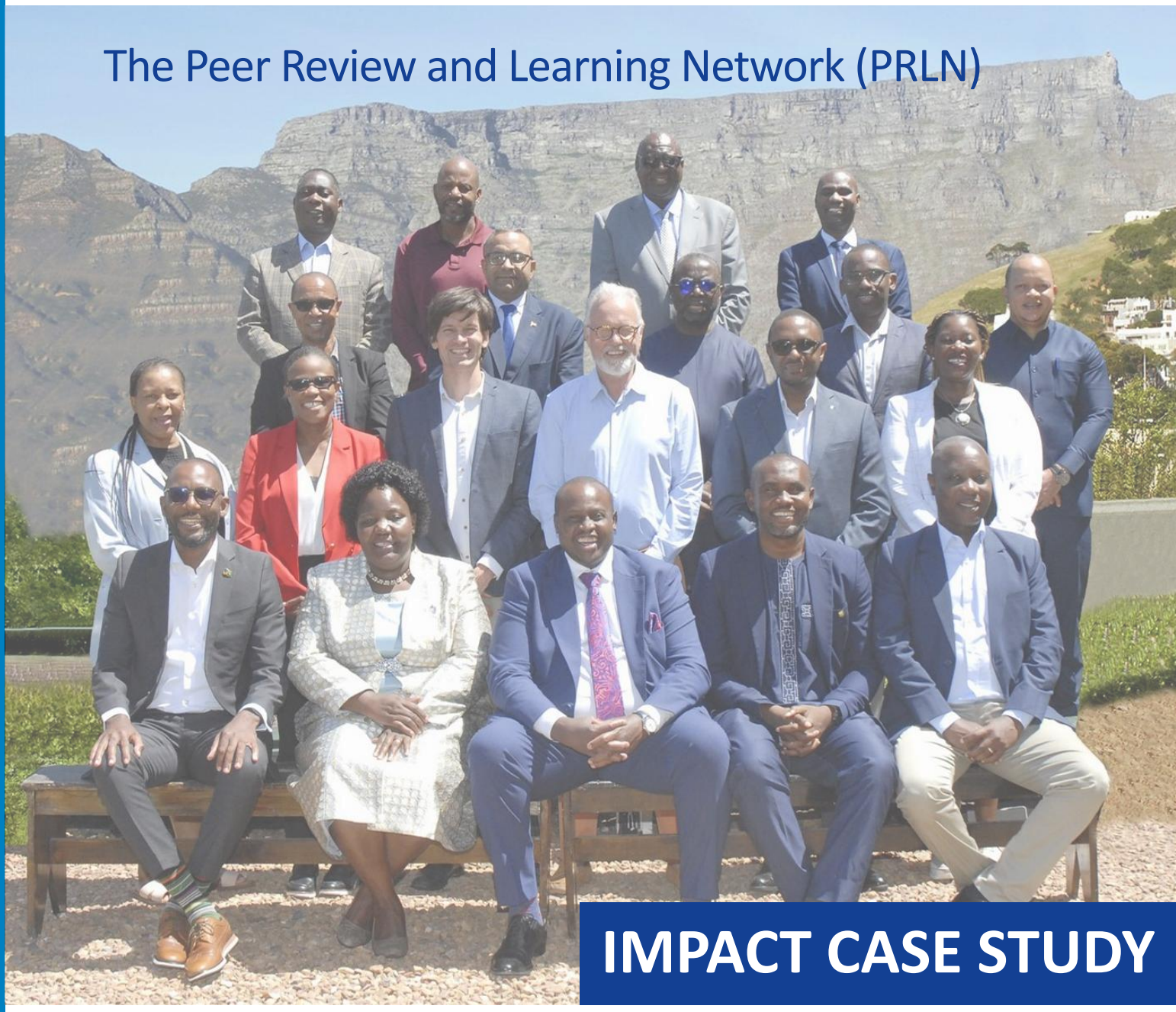
Global Gateway

UNIVERSITY OF CAPE TOWN
GSB POWER FUTURES LAB

GET.transform
Transforming Energy Sectors Globally

Transforming Africa's Energy Regulation Landscape

The Peer Review and Learning Network (PRLN)



IMPACT CASE STUDY

GET.transform is co-funded by

german cooperation
DEUTSCHE ZUSAMMENARBEIT

Norway

Ministry of Foreign Affairs of the Netherlands

Sweden
Sverige

Austrian Development Cooperation

Prepared by
Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

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Place and date of publication
Bonn, October 2025

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Photo credits
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GET.transform is a European programme which offers developing and emerging countries comprehensive advisory services to advance their energy sector transformations. It is hosted on the multi-donor platform GET.pro (Global Energy Transformation Programme), and co-funded by the European Union, Germany, Norway, the Netherlands, Sweden and Austria.

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Introduction

In this series of **Impact Case Studies**, GET.transform sheds light on the tangible and lasting results of advancing energy transitions in partnership with high-impact countries and regions. Focusing on both policy and technical reforms, each case explores how tailored advisory, collaborative dialogue, and hands-on implementation have translated into real-world progress. More than snapshots of success, the case studies surface valuable lessons on what has worked and what has not—insights that may inform future strategies for enabling clean, affordable, and reliable energy systems. Together, they aim to capture how targeted support can create ripple effects far beyond individual or consultant interventions.

This case study illustrates the impact of the African Electricity Regulators' Peer Review and Learning Network (PRLN) as developed by the Power Futures Lab at the University of Cape Town's Graduate School of Business and delivered in partnership with GET.transform. It is a multi-year capacity-building programme for electricity regulator CEOs, helping to drive the energy sector towards greater credibility, transparency, and robustness in regulatory decision-making. The objective is to enhance the overall investment and development outcomes through improved performance of the continent's electricity infrastructure industry.

This work is made possible by the dedication and openness of the countries engaged in the PRLN, whose drive for continuous improvement in energy sector governance serves as an inspiration: Cameroon, Egypt, Eswatini, Ghana, Kenya, Mozambique, Namibia, South Africa, Tanzania, Uganda, Zambia, and Zimbabwe. We extend our appreciation to all participating countries and their regulatory leadership.

Partner Testimonials

GET.transform, through the Peer Review and Learning Network, has created value for my institution because it has made my work easy. I'm not reinventing wheels. Where this has been done before, I now have the opportunity to share, to learn, and to adapt - yes, to take that to my own country's regulatory framework - and I'll be ready to move.

Eng. Ziria Tibalwa Waako
CEO, Electricity Regulatory Authority (ERA), Uganda

Six regulators get to spend a whole week together - uninterrupted and at CEOs' level. This is a strategic point. I don't think you would ever find a platform where you have 6 CEOs from 6 different countries that are spending time and speaking only on issues that matter to them. So, it is a very good platform.

Pinehas Mutota
General Manager, Electricity Control Board (ECB), Namibia

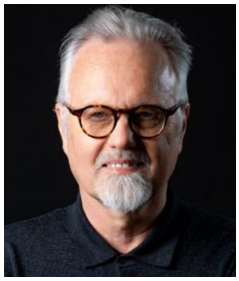
The PRLN is one of the most impactful, illuminating, and transformative capacity-building initiatives we have facilitated and is both satisfying and meaningful for regulator CEOs. The quick turnaround, regulatory changes, and visible reform commitments during and after a week's peer review effectively unclog the investments and performance pipelines of the energy sector.

Dr. Peter Twesigye
Senior Lecturer & Research Lead (PRLN), Power Futures Lab

Implementing Partners

The Power Futures Lab: African Convening Facilitators and Subject Matter Experts at the University of Cape Town

The African Electricity Regulators' Peer Review and Learning Network (PRLN) was conceptualised and is facilitated by reputable African scholars with extensive industry and academic experience from the Power Futures Lab. The Power Futures Lab at the University of Cape Town (UCT)'s Graduate School of Business provides well-grounded capacity building and research expertise via a well-tested trust-building team including Prof. Anton Eberhard, Dr. Peter Twesigye and Dr. Wikus Kruger. They are bringing frontier knowledge and African context realities to the group of regulator CEOs.



Prof. Anton Eberhard, Founder of The Power Futures Lab is Professor Emeritus and Senior Scholar at UCT, where he leads the advisory board of the Power Futures Lab. His research focuses on power sector reform, regulation, renewable energy, and the linkages between electricity access and sustainable development. He has worked in the energy sector for over 35 years across Africa and beyond, advising governments, utilities, and international organisations, and has published extensively. Eberhard has served on national and international commissions, including chairing a presidential task team on Eskom, and is recognised with multiple awards for his contributions to the energy sector.

Dr. Peter Twesigye, Senior Lecturer & Research Lead Power Market Reforms and Regulation is an infrastructure economist with more than 18 years' experience in electricity distribution and water management. He leads the African Electricity Regulators' Peer Review and Learning Network and also lectures at the University of Florida's Public Utility Research Centre. His research focuses on power market reforms, regulation, utility performance, and renewable energy transitions. Twesigye has advised governments, regulators, utilities, and international agencies across more than 15 African countries, and has published widely on energy policy and utility reform.

Dr. Wikus Kruger, Director of the Power Futures Lab has been working in the African energy sector for more than 14 years. He holds a PhD from UCT; an MSc from Antwerp University; and MPhil, BPhil and BA degrees from Stellenbosch University. His research focuses on measures to accelerate investment, in particular into renewables, through structured procurement programmes such as auctions.

1 The Challenge

Effective regulation is a critical enabler for accelerating Africa's renewable energy transition and scaling the infrastructure needed to meet growing demand. However, in many African countries, weak institutional capacity among regulators and limited buy-in from policymakers continue to hinder progress. According to the African Development Bank's Electricity Regulatory Index, most national regulators score low in areas such as independence, transparency, and technical competence, reducing their ability to attract private sector investment and ensure long-term sector viability.

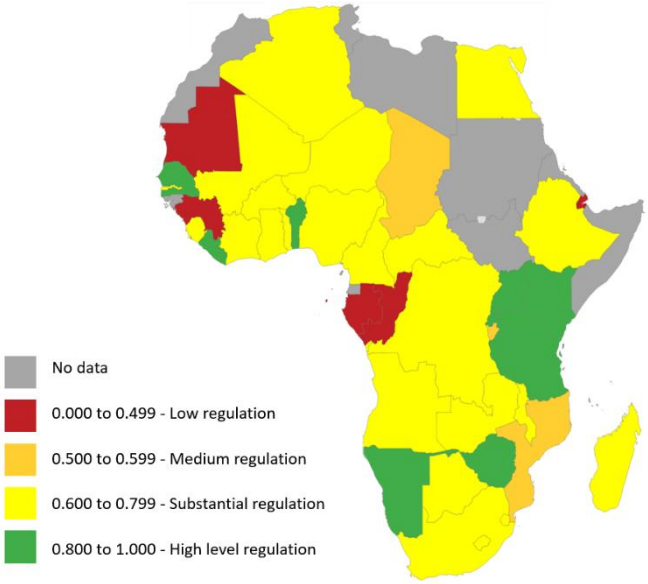


FIGURE 1. Electricity Regulatory Index for Africa 2024 (Source: AfDB)

This regulatory weakness is combined with broader structural challenges. Inadequate generation capacity, poor utility performance and low electrification rates continue to affect economic development and social inclusion, with over 600 million people across Sub-Saharan Africa still lacking access to electricity. Below cost-recovery tariffs further erode the financial position of utilities, which frequently struggle with poor technical and commercial performance, reflected in high distribution losses, low revenue collection rates, and insufficient maintenance of assets.

Together, these barriers create a fragmented and unpredictable market environment that hinders investment, delays project implementation, and weakens trust among stakeholders. Addressing them requires a concerted effort to build regulatory capacity, establish clear and transparent tariff frameworks, and embed long-term policy coherence, laying the foundation for a stable, investor-ready renewable energy sector.

2 The Approach

To help strengthen national regulatory frameworks across the continent, GET.transform is advancing institutional leadership and regulatory capacity through the **African Electricity Regulator Peer Review and Learning Network (PRLN)**, implemented in partnership with the Power Futures Lab (PFL).

The PRLN is an African initiative for peer-to-peer learning and supports the professional development of CEOs of African electricity regulators through experiential learning, structured exchanges and in-depth country reviews. Regulator CEOs are key decision makers in calibrating institutional frameworks that define the setting of the rules of the game and providing incentives to improve the investment climate and overall performance of the sector.

The participating countries take turns in being the host and focus of the in-depth peer analysis. CEOs spend an entire week analysing relevant documentation and data at the hosting regulatory agency, as well as conducting interviews with the line minister of energy, board members and senior management of the regulatory agency, CEOs of regulated utility companies, private investors in IPPs and electricity consumer groups. This allows the visiting team to get a "360-degree" view of the host regulatory system that the host agency is not always able to discern. Over the course of a week, the CEOs and the PRLN team provide feedback and recommendations to the line Minister of Energy, the regulators' boards and senior management, ensuring progressive improvement and strategic capacity building.

The continuous exchange and trainings across several years aim at improving regulatory performance, leadership effectiveness, and support the harmonisation of good regulatory practices. Forming part of the African Union's efforts to harmonise regulatory frameworks in support of the African Single Electricity Market (AfSEM), the PRLN also ensures that electricity reform is enhanced, performance incentives are allocated, risks are reduced, and the investment climate and development outcomes (access, efficiency, affordability, etc) are improved which ultimately facilitate economic growth and poverty alleviation.

3 The Impact

From May 2022 to September 2024, the PRLN successfully concluded regulatory reviews in six countries: **South Africa, Tanzania, Uganda, Kenya, Namibia**, and **Ghana**. These reviews fostered concrete reforms across several key areas. They supported amendments to energy laws and policies and strengthened governance structures for boards of directors. They also promoted the use of renewable energy auctions, model power purchase agreements (PPAs), and cost-reflective tariffs. In addition, the reviews encouraged the liberalisation of energy markets, including the transition from a single-buyer model to multi-market and wholesale markets with independent system operators (ISOs). They advanced more flexible public–private partnership (PPP) arrangements and improved overall transparency.

All country reviews led to a formal commitment to strengthen competitive procurement processes for renewable energy, which is a fundamental shift away from non-transparent procurement processes, resulting in expensive projects. Countries like **Kenya**, **Namibia, South Africa**, and **Ghana** have raised their below-cost tariffs to full or near cost-reflective levels. All participating regulators are committed to enforcing revenue collection metrics for regulated utilities to improve the creditworthiness of their off-takers and distribution utilities. In parallel, all of the first cohort regulators have put in place boards and transparent processes to appoint leadership, as well as committing to clean renewable projects and access programmes. All participating countries have either revised their primary energy laws or policies. Renewable energy regulations and rules have been developed.

All participating regulators and utilities have a better appreciation of the value of power pools and AfSEM and have prioritised universal access. There is enhanced and continued peer learning amongst the CEOs and their staff who fully embrace the value of best-practice knowledge sharing to unlock regulatory barriers. All regulators in cohort one have put in place net-billing/metering regulations for distributed energy resources (DER).

The country reviews also help identify priority areas for technical assistance which can be supported by GET.transform or other development partners, ensuring continuity between peer learning and targeted implementation support. Two spin-off programmes, the Distributed Generation (DG) and Effective Renewable Energy Tendering Policy Catalyst Windows, have been conducted successfully with staff from regulatory institutions, made possible by the PRLN unlocking the entry points.

More than half of countries from the phase one have updated their grid codes to facilitate better integration of renewable energy. **Uganda, Kenya**, and **South Africa** are in advanced stages of procuring and implementing Independent Transmission Projects (ITPs) to crowd in private investments to offtake renewable projects and catalyse universal access. All regulators have preferred and committed to least cost energy planning (LCEP) and formulation of Integrated Resource Plans.

In **Uganda**, the regulator ERA with support from GET.transform, is fast-tracking the development of an auction framework for renewable energy projects. Tendering is expected to commence soon. In

addition, the previous politically propagated disruptive re-bundling efforts have been set aside, giving IPPs a sense of revenue security going forward. In **Tanzania**, model PPAs have been reviewed and approved by the regulator Board. The Small Power Producer (SPP) rules have been approved and are due for gazetting. A consultant is to be contracted to undertake the Cost-of-Service study. The tariffs which had not been reviewed since 2016 are currently being revised alongside new rate-setting rules. In parallel, EWURA has designated TANESCO as an Independent System Operator with plans to separate it from the single buyer.

South Africa has implemented almost half of all recommendations of the peer review exercise, including greater participation in the SAWEM market development and market code development. While some hurdles remain to be resolved, NERSA is setting up the Electricity Market Advisory Forum (EMAF) to solicit sector skills to reinforce its capacity in the new market arrangements. In **Ghana**, quarterly tariff adjustments are now regularly implemented, and the country has most recently issued a new law mandating competitive bidding for power generation. In addition, a draft Bill has been developed to streamline regulatory functions between the Public Utilities Regulatory Commission (PURC) and the Energy Commission (EC). The regulator PURC has also drawn up new investment guidelines, which are being implemented as part of the ongoing 2025 major tariff review.

FIGURE 2. Successes of the PRLN Countries

In June 2025, the review of the first country (Zambia) of the second cohort, otherwise including Cameroon, Egypt, Eswatini, Mozambique, and Zimbabwe, was implemented. The blend of these countries not only provides regional regulatory insights but also enables a comparison of different opportunities that arise from the differently structured power markets. The CEOs appreciated the collegial review and learning experience with peers from African countries.

Overall, the PRLN has already contributed to more robust regulatory decision-making, greater transparency, improved credibility, rebuilt staff capabilities and more effective electricity pricing, all critical factors for enabling sustainable investment and sector performance across Africa.

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