UC Davis
Newsletters

Title
Majority Mobility - Issue 3

Permalink
https://escholarship.org/uc/item/537713q5

Author
Global South Center for Clean Transportation

Publication Date
2026-06-01

DOI
10.7922/G2DN43F5

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Global South Center
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# MAJORITY MOBILITY

A quarterly publication

ISSUE 3

## From Transition to Transformation: How Clean Mobility Can Transform African Economies

JUNE 2026

# Contents



https://doi.org/10.7922/G2DN43F5 JUNE 2026 ISSUE 3 VOLUME 1

# Global South Center for Clean Transportation at UC Davis

**Driving equitable, science-based transitions in energy and mobility**


The **Global South Center for Clean Transportation** at the UC Davis Institute of Transportation Studies (ITS-Davis) supports advancement of clean transportation and energy transitions in developing countries. The center has a cross-cutting research portfolio across South Asia, Africa and Latin America, with strategic country-level programs in India, Mexico, Brazil, Indonesia and Kenya. It leverages ITS-Davis's global leadership in science-based, policy-driven solutions to strategically collaborate with state and national governments, NGOs, and industry, to promote zero-emission transportation policy including clean energy supply chains. The center serves as the founding member and secretariat of the Council for Critical Minerals Development in the Global South and the California-Africa Climate and Economic Partnership.

## The Center has four work pillars:

- Zero Emission Vehicles
- Battery and Minerals Supply Chains
- Low Carbon Fuels
- Unlocking Finance

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# Letter from the Editor

Across Africa, the clean mobility transition is taking shape through electric two-wheelers in Kenya, electric buses in Lagos and Dakar, new conversations around sustainable aviation fuels, and partnerships connecting climate action with industrial development and economic opportunities.

The theme for this issue of Majority Mobility is "From Transition to Transformation: How Clean Mobility Can Transform African Economies." We chose this theme because the continent is at a key crossroads, with countries working to reduce exposure to volatile fuel imports, while expanding access to affordable and reliable mobility, improving air quality, and creating new economic opportunities. The policy choices being made today will shape the direction of the transition for years to come.

Throughout these pages, the issue brings to the fore that the transition cannot succeed by focusing solely on replacing one technology for another. Institutions need to be built up and developed alongside local technical capacity, reliable energy infrastructure, supportive finance, and industrial strategies that enable transitions that respond to countries' needs and priorities.

We open this issue with a perspective on the California-Africa Climate and Economic Partnership, which shows how subnational cooperation can support shared learning, investment, and implementation across regions. We then examine capacity building for sustainable transportation policy in Africa, with a focus on moving beyond older models of technical assistance toward approaches that are more locally grounded and institutionally durable.

In Kenya, contributors look at the rapid growth of electric two-wheelers and the policy framework needed to electrify light-duty vehicles while supporting local value creation. In Nigeria and Senegal, pieces on Lagos and Dakar show how electric bus deployment is moving from pilots to broader procurement, grid readiness, financing, and long-term planning. We also explore how sustainable aviation fuels could help Africa respond to rising air travel demand while creating opportunities for regional fuel production and energy security. Finally, this quarter's Market Watch places these developments within a broader Global South context, where emerging markets are playing an increasingly important role in shaping global EV demand.

Africa's clean mobility transition is not merely a technological swap. If leveraged well, it can become a catalyst for a broader ecosystem that advances affordability, resilience, industrial development, and local leadership. It is our distinct honor to invite you to read, share, and join us in building this conversation.

—Francisco A. Parés Olguín
Editor, *Majority Mobility*
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# California-Africa Climate and Economic Partnership

Samuel Assefa
*Director of the California Governor's Office of Land Use and Climate Innovation*

As the impacts of climate change intensify, and federal climate initiatives face renewed uncertainty, California continues to advance a pragmatic, globally engaged approach to climate and transportation policy. Through its growing network of subnational partnerships, the state is working with international partners to accelerate clean energy deployment, expand zero-emission transportation, and support resilient economic growth.

Building on this portfolio, California reached a historic milestone in 2025 by signing its first California-Africa subnational agreements with **Kenya** and **Nigeria**. These partnerships are designed to share policy expertise, technical knowledge, and investment opportunities in renewable energy, electric vehicle (EV) deployment, sustainable transportation, and climate-aligned economic development, while protecting communities and the environment.

At the heart of the **California-Africa Climate and Economic Partnership (CACEP)** is the shared commitment that together, we can tackle the biggest climate challenges through technology, innovation, and trade, with the goal of alleviating human suffering and building community resilience to climate change-induced disasters.

Africa and California face similar climate challenges from persistent droughts, extreme heat, and deadly wildfires to urban sprawl, energy insecurity, and resource stress. But we also share an unprecedented opportunity to leapfrog outdated models by aligning sustainable land use with clean energy, resilient infrastructure, and digital innovation.

These agreements establish a framework for collaboration in key areas such as zero-emission transportation, sustainable freight, clean energy innovation, climate-friendly agricultural practices, and resilient infrastructure. They also support knowledge exchange, workforce development, and expanded trade opportunities between California and Africa.

As the fourth largest economy in the world, California's USD 4.25 trillion innovation economy—particularly in clean tech, sustainable land use, and digital infrastructure—has so much to offer and gain from deepened collaboration. Our global economic future depends on investing in partnerships that are not only equitable but designed to have lasting effects.

Africa is on track to become the world's most populous region, with 2.5 billion people by 2050. More than 70% of sub-Saharan Africa is composed of people under the age of 30. We are already seeing youth-led startups across sectors such as energy access, e-mobility, and digital logistics, creating scalable solutions. This growing economic influence makes Africa a critical partner in global climate efforts. In 2022, California exported nearly USD 800 million in goods to African markets, underscoring the potential to expand trade alongside climate cooperation.

The future of sustainable land use hinges on integrated systems, housing, transport, energy, and nature-based infrastructure all working together. Africa's rapidly urbanizing population and growing economy presents a proving ground to build cities that are climate resilient, walkable, connected, and powered by renewables. We're eager to support these news ways of thinking and to learn from their experiences. We see huge potential for joint planning efforts, shared learning platforms, and California-backed technical support for green port development, electric transit corridors, and data-driven urban design.

In California, under Governor Gavin Newsom's leadership, we're also pioneering tools to decarbonize the built environment, rethink mobility, and scale nature-based infrastructure. California stands ready to share our knowledge and experience in green economies and community adaptation with other regions of the world.

The Governor's Office of Land Use and Climate Innovation (LCI), with the California Strategic Growth Council (SGC), has developed an integrated portfolio of land use, mobility, housing, and climate programs that offers practical models for countries facing similar pressures. For African nations working to manage rapid urban growth, expand clean transportation, strengthen climate resilience, and support inclusive economic development, California's experience provides a valuable framework for policy design, investment, and implementation.

Examples include:

- The **Fifth Climate Change Assessment**, a suite of almost 70 reports with groundbreaking original research on the effects of climate change on the

land and the people, will be published this year. The assessment will be used for creating policy and practices for decades to come. This year's assessment is the first to include Tribal knowledge and engagement, a model for the critical integration of Indigenous science and culture.

- The development of the state's updated **Extreme Heat Action Plan** and **CalHeatScore**, an extreme heat early warning tool for California, along with **investments in local plans and actions** to protect the most vulnerable communities from extreme heat.
- The **Affordable Housing and Sustainable Communities Grant Program**, which makes it easier for Californians to drive less by connecting housing, jobs, and key destinations that are accessible by walking, biking, and transit.
- The **Sustainable Agricultural Lands Conservation Grant Program**, which supports agricultural conservation, economic growth, and sustainable development. The program fights climate change by protecting our productive farmlands and encouraging thoughtful planning of concentrated, transit-oriented communities.
- The **Transformative Climate Communities Grant Program**, which offers a unique, place-based strategy for reducing greenhouse gas emissions, designed to catalyze collective impact through a combination of community-driven climate projects in a single neighborhood. The projects include affordable and sustainable housing developments, transit, and electric bicycle- and car-share programs.
- **Community Resilience Centers**, which funds local cooling centers, shade, water features, and greenery.
- The **Tribal Housing and Capacity Building Initiative**, which includes two grant programs exclusively available to California Native American Tribes to fund housing development and climate resiliency.

These interconnected programs could serve as models for African countries confronting similar challenges in their communities.

Our office is already exploring how we can support place-based climate adaptation that centers communities, and we see immediate alignment with Africa's Agenda 2063—from high-speed rail to low-emission cities. We're also looking forward to learning from Africa's progress in distributed energy, solar microgrids, and low-cost deployment models.

Since the launch of these partnerships, working groups in California, Kenya, and Nigeria have been focused on translating dialogue into practical initiatives, tangible projects, and long-term institutional collaboration. While this work is still underway and continues to evolve, several promising areas of action have already emerged. These include efforts to advance Africa's first Center of Excellence for Sustainable Transport in Nairobi, Kenya, in partnership with UC Davis, as well as opportunities to connect this work with broader Global South clean transportation platforms and initiatives. The partnerships are also helping catalyze new connections across academia and cultural institutions. For example, the Exploratorium is exploring plans for a new science museum in Nairobi, creating additional opportunities for educational exchange between California and Kenya. These early efforts illustrate how the partnerships are beginning to foster durable relationships that extend beyond government, creating new avenues for collaboration across research, business, and sustainable development.

Government officials, industry leaders, and researchers from California, Kenya, Nigeria, and other African countries recently gathered at the **2nd California-Africa Climate and Economic Forum** in San Francisco to focus on transitions in the energy and transportation sectors.

Participants agreed that green energy and transportation is not just climate action, but a critical economic opportunity. This is the pivotal moment for bold, collaborative innovation.

Through the engagement and relationship-building, we're already seeing progress, and I envision tangible benefits multiplying as the collaboration matures over the years ahead and potentially expands to include other African countries.

Climate change is a global challenge, and we need to cooperate across oceans and borders to advance creative, integrated solutions. California stands ready to work alongside African leaders and innovators to pilot projects, share policy tools, and co-develop scalable, climate-positive solutions.

# Building Capacity for Sustainable Transportation Policy in Africa: A New Approach

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Electric mobility is rapidly accelerating in the Global South. The recent oil price shock due to the war on Iran has brought into sharp relief the true cost of oil dependency. Electric vehicle (EV) adoption in Africa has so far trailed behind Asia, Europe, and the Americas, but it is accelerating with decreasing costs and country-specific innovations, such as electric two-wheel vehicles.

A large-scale transition to e-mobility requires a systems change approach to simultaneously transform transportation and energy. To guide and accelerate the transition, a whole-of-government approach is needed. This entails building the capacity of government institutions to identify, prioritize, adopt, and implement a comprehensive set of policies and regulations.

## What is Capacity Building?

Capacity building can be generally thought of as the development of the knowledge, skills, institutions, and enabling environments that allow local actors and institutions to plan, manage, and implement long-term development strategies. Capacity building has different, mutually reinforcing forms: human, organizational, and institutional.[1] The term "capacity building" for the Global South emerged in the 1950s and 1960s, in the context of global aid, where it took the form of financial support, training, and technical assistance, predominately directed by Global North actors. The approach focused on enhancing government and institutional capacities through public-private, North-South partnerships, but in practice these efforts largely remained donor-led and dependent on Global North expertise. Too often, they relied on generic models that overlooked local political and institutional realities,[2] treated local actors as recipients rather than leaders, and in some cases reinforced dependence on recurring external assistance rather than building durable, self-sustaining capacity.[3]

[1] Srinivas H. (2026) "Capacity Building for Urban Management: Defining the Concept." GDRC Research Output - Concept Note Series E-254. Kobe, Japan: Global Development Research Center. https://www.gdrc.org/uem/capacity-define.html
[2] Wieszczeczynska KA, Tollin N, Spaliviero M. (2024) Capacity building within urban climate resilience in the Global South – a literature review. Frontiers in Sustainable Cities 6:1380936. https://doi.org/10.3389/frsc.2024.1380936
[3] Organisation for Economic Co-operation and Development (OECD). (2012) "Supporting Partners to Develop their Capacity: 12 Lessons from DAC Peer Reviews." (Paris: OECD Publishing). https://www.oecd.org/content/dam/oecd/en/publications/reports/2012/06/supporting-partners-to-develop-their-capacity_g1g1c1c0/9789264174306-en.pdf

# Capacity Building Approaches for the E-mobility Transition in Africa

Capacity building is evolving from the existing paradigm of Global North-driven expertise. The approach of the ITS-Davis Global South Center for Clean Transportation is to combine technical expertise with local partnerships and capacity building to help develop solutions tailored to each country's context.

While Global South countries have the opportunity to leapfrog past the development of petroleum- and personal vehicle-based transportation systems, their contexts for mobility and development pathways differ from those of Global North countries. Although exchanges between Global North and South on best practices, toolkits, and workshops are valuable, they are insufficient to build the necessary expertise on the ground to craft impactful, lasting solutions. Such solutions require local, permanent, human, and institutional capacities to design and implement policies. Table 1 lists some of the strategies that ITS-Davis and partner organizations have engaged in and supported to help build capacity and enabling conditions.

**Table 1. Capacity Building for E-Mobility Policy Frameworks: Key Elements**

| Category | Key elements |
|---|---|
| **Human capacity: Knowledge and learning** | Workshops and exchanges with global experts |
| | Memorandum of Understanding partnerships |
| | World Bank e-Mobility Academy to accelerate learning from global experts and Global South peers |
| | Peer-to-peer networks |
| | ITS-Davis staff based in Global South countries to accelerate and contextualize development of solutions |
| | Centers of excellence for policy research in Global South countries |
| | Professional degree programs for mid-career government officials |
| **Institutional capacity** | Whole-of-government approach to ensure intra-governmental coordination for holistic systems change |
| | High-level government leadership to champion e-mobility |
| | Legal mandates and authorities for ministries to adopt necessary policies and regulations |
| **Enabling conditions** | Comprehensive policy framework to guide market actors and de-risk financing |
| | Market, energy, and environmental data to support evidence-based policymaking |
| | Financing at scale that leverages public, international development, and private capital |

For example, under a broader California-Kenya bilateral Memorandum of Understanding,[4] ITS-Davis is partnering with the Kenyan government and some African universities for a first-of-its-kind Africa Center Transportation Initiative,[5] which will establish a Centre of Excellence on Sustainable Transportation.[6] This Initiative aims to accelerate policy, technology, and finance pathways for zero-emission and equitable mobility. The Initiative may also collaborate with a local university to develop a professional degree program to train mid-career government officials from different African countries. Eventually, the program could be expanded to create an academic twin to the ITS-Davis post-graduate degree programs that have been successful in human capacity building by training policy professionals that work in government, industry, and non-governmental organizations.[7]

Another approach is UC Davis' partnership with the World Bank Group's Academy to develop the Accelerating Urban E-mobility Solutions academy training program.[8] ITS-Davis serves as a knowledge partner and brings its policy expertise, which complements and mutually reinforces the World Bank Group's finance expertise. Finance is key to enabling e-mobility, but it requires clear policy and regulatory frameworks to create greater market certainty to de-risk investments in e-mobility projects. The academy training program would bring together national and local government representatives, from Ministries of Transport and municipal transit agencies in Global South countries, for a year-long training course that blends peer-to-peer learning, expert-led webinars, immersive study visits, and participation in an active community of practice. The program culminates with a capstone project focused on a specific e-mobility project with active engagement from participants.

Finally, a fundamental approach ITS-Davis has adopted is to hire staff on the ground and from the country to work directly on a day-to-day basis with local government agencies, for example in India and Kenya, to break the Global North expert paradigm. The local staff also foster institutional intra-governmental capacity building. Because they are not affiliated with a single ministry, they can enhance cross ministry dialogue and cooperation, necessary for a whole-of-government approach. The local staff can work closely with ITS-Davis researchers, who can then tailor their solutions to the local context, guided by local knowledge and expertise.

## Conclusion

E-mobility is accelerating rapidly in Africa as electric vehicle technology becomes more affordable, and the costs of petroleum dependency become clearer. Many African nations have initiated e-mobility strategies. Global experts can help support this transition by learning from the limitations of past approaches on capacity building and by prioritizing the development of local human and institutional capacities and the key enabling conditions of policy, data, and finance.

[4] Office of Governor Gavin Newsom. (2025) "California and Kenya join in a historic partnership to curb emissions and boost trade." https://www.gov.ca.gov/2025/09/25/california-and-kenya-join-in-a-historic-partnership-to-curb-emissions-and-boost-trade/
[5] ITS-Davis. (2025) "Historic California-Kenya Climate and Trade Partnership." https://its.ucdavis.edu/news/its-davis-expands-role-historic-california-kenya-climate-and-trade-partnership
[6] ITS-Davis. (2025) "UC Davis Joins Delegatoin Advancing California-Africa Climate Partnerships; Launches Africa Clean Transportation Initiative." https://globalsouth.ucdavis.edu/news/uc-davis-joins-delegation-advancing-california-africa-climate-partnerships-launches-africa
[7] Sperling D. (2026) Lessons learned by an expanding university transportation center: Insights from the Institute of Transportation Studies at University of California, Davis. Transportation Research Today, 1 (2026) 100005.
[8] World Bank Group Academy. (2025) Accelerating Urban E-Mobility Solutions. https://academy.worldbank.org/en/our-programs/by-theme/accelerating-emobility

# Opportunities for Growing Production and Demand for Sustainable Aviation Fuels in Africa

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Roger - stock.adobe.com

For many years, air travel between most African countries involved long journeys to and from Europe, or more recently the Middle East, to make flight connections. Today, however, Africa's economic and demographic growth, including expanding urban markets and rising disposable income for passenger travel, is driving major demand for intra-continental commercial air service. The African civil aviation market, forecasted to grow by 6% in 2026, outpacing the global average, is no longer hypothetical but a growing reality. This momentum is closely linked to the success of the Single African Air Transport Market (SAATM), an African Union initiative to liberalize air transport across the continent, which has 38 African signatories and has helped catalyze the launch of over 100 new intra-African routes in the last few years. SAATM is dismantling the protectionist barriers that once made it difficult to fly between neighboring countries and creating "Open Skies"—a more open environment for new international agreements. This new environment is the primary engine behind Boeing's projections that Africa's commercial fleet will more than double over the next two decades to meet the needs of a passenger base that the International Air Transport Association expects to reach 411 million by 2044.

As connections and flight frequencies grow within and outside of Africa, the continent will face a surge in aviation fuel demand that could double or even triple current levels. This growth will need to be paired with continued investment in newer, more efficient aircrafts, but efficiency gains alone are unlikely to offset the fuel needs of a rapidly expanding aviation market. Without a proactive shift toward domestic or regional production, rising demand could deepen Africa's dependence on expensive and volatile fuel imports, which are already 17% higher than the global average due to supply chain inefficiencies. The war on Iran has driven prices higher, considering that most jet fuel imports to the continent come from the Middle East. Integrating sustainable aviation fuel (SAF) into Africa's civil aviation roadmap for growth is therefore a strategic necessity to ensure a stable, local, resilient supply of aviation fuel, given uncertain geopolitics. It is also necessary to prevent

a conventional fuel lock-in, where new infrastructure, procurement systems, and investment pathways continue to favor fossil jet fuel in ways that could penalize African carriers in an increasingly net-zero global market. By leveraging the growing demand for air travel to build a local SAF industry, African nations can ensure that the economic and social rewards of their aviation success remain within the continent, fueling their planes and their domestic industrial sectors.

Engaging African governments on the strategic benefits of SAF is a vital prerequisite for positioning Africa's growing aviation market to address the transportation sector's impact on climate. Although the production of SAF is currently more expensive than conventional jet fuels due to infrastructure and financing hurdles, supportive government policies and a collaborative approach with industry will help de-risk the sector and catalyze SAF supply chains and production in key African economies.

Furthermore, industry leaders, such as Ethiopian Airlines and Kenya Airways, could help send a strong demand signal for SAF, which could be manufactured from underused continental reserves of agricultural waste—turning millions of tons of residues that are currently burned into a high-value industrial asset. This transition would allow African nations to move up the value chain from fuel importers to sophisticated commodities producers, securing greater energy independence and delivering the lower-carbon fuels necessary to remain globally competitive.

African production of SAFs would also ensure SAF availability for international airlines serving Africa. As US, European, and other global airlines continue to pursue their decarbonization commitments, ensuring a supply of SAF at their outstations in Africa could help carriers access lower-carbon fuel options on routes serving the continent. This could also amplify U.S. airports' ability to enable inbound SAF by increasing global SAF availability in the Global North and Global South alike.

Given these reasons for SAF expansion in Africa, the Global South Center for Clean Transportation at UC Davis will be playing a growing role in the SAF conversation. At the 2nd Annual California-Africa Climate and Economic Forum, hosted during San Francisco Climate Week in April 2026, the UC Davis Global South Center for Clean Transportation, in partnership with San Francisco International Airport (SFO), convened a panel including SAF experts, African airlines and financiers, and airport representatives that discussed the importance of international knowledge sharing and cooperation to advance common aviation decarbonization goals. That session ended with consensus among the speakers that a new UC Davis-led platform for collaboration and capacity building on SAF in Africa, ideally to serve new US markets, is timely and essential.

Leveraging UC Davis's world-leading expertise on transportation decarbonization and low carbon fuels, the Global South Center for Clean Transportation plans to organize a coalition of Californian and other US partners, African counterparts, and representatives from the aviation, airport, and fuels sectors that operate in Africa. The aim of the coalition is to develop harmonized policies and market guidance to catalyze investment in Africa's SAF supply chains and promote SAF use by Africa's rapidly growing airlines. This effort will draw upon California's expertise through its Low Carbon Fuels Standard (LCFS), which is driving industry innovation to meet a targeted 30% reduction below 2010 levels in the average carbon intensity of transportation fuels by 2030. Similarly, airports such as San Francisco International Airport are working to make SAF available to their airline partners and share their experience and knowledge with the world through active participation in global organizations and platforms.

Ultimately, building a dynamic, profitable SAF market relies upon many stakeholders, public agencies, and sectors coming together to create success. The coalition organized by the Global South Center for Clean Transportation will do exactly that: convene the experts and decisionmakers, support them in developing the policies and regulations needed to increase the production of SAF, and ultimately deliver the benefits of aviation decarbonization into, out of, and within Africa.

# Kenya's Light-Duty Vehicle Electrification: From Climate Ambition to Industrial Development

Aakansha Jain
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**Kenya's National E-Mobility Policy**, launched earlier this year, provides a timely framework for aligning the country's clean transportation ambitions with opportunities for local manufacturing, assembly, and green industrial development. By setting a long-term direction toward 100% zero-emission vehicle (ZEV) sales by 2050 across vehicle segments, the policy sends a strong market signal while building on the progress the country has already made in scaling electric vehicle (EV) adoption. Total EV registrations in Kenya increased from just 65 vehicles in 2018 to more than 25,000 in 2025 (a compound annual growth rate [CAGR] of 107%). This growth has been led primarily by electric two-wheelers (e2Ws), whose share in annual two-wheeler registrations rose from about 3% in 2023 to around 15% in 2025,[1] reflecting rapid growth in an emerging EV market.

The light-duty vehicle (LDV) segment, however, has not seen a comparable transition. Over the years, LDVs have accounted for more than 30% of annual vehicle registrations, but electric vehicles (EVs) represent only 0.4% of registrations in the segment. Despite having installed domestic assembly capacity of approximately 46,000 units, Kenya continues to meet more than 80% of its LDV demand through imported, fuel-inefficient, used vehicles, with an average age of 7 years at entry. This has significant implications for emissions and energy demand. Road transport contributes more than 95% of transport sector emissions,[2] and LDVs account for nearly 45% of

[1] Kuhudzai RJ. (2026) "Electric Motorcycles Reach 15.3% Market Share of New Registrations in Kenya in 2025." CleanTechnica. https://cleantechnica.com/2026/02/09/electric-motorcycles-reach-15-3-market-share-of-new-registrations-in-kenya-in-2025/
[2] International Energy Agency. (2025) "Greenhouse Gas Emissions from Energy Highlights." IEA, Paris. https://www.iea.org/data-and-statistics/data-product/greenhouse-gas-emissions-from-energy-highlights

road transport emissions.[3] With domestic petroleum demand increasing by 8% in 2025,[4] shifting the LDV market toward electric vehicles can support Kenya's climate and energy security objectives while creating conditions for local automotive industry development.

Kenya's electric two-wheeler experience shows how targeted policy support can reinforce market development. Zero-rated value-added tax and zero excise duty improved early adoption conditions, while institutional capital, asset-finance partnerships, and the entry of electric two-wheeler manufacturers, operators, and battery-swapping companies helped build a growing ecosystem. Expanding local assembly capacity has further positioned the country as an emerging East African hub for electric two-wheeler manufacturing and deployment.

Scaling EV adoption in the LDV segment, however, will require a clear regulatory framework that supports both sustainability and industrial policy objectives. This includes policies that promote a managed shift away from inefficient, used internal combustion engine (ICE) vehicle imports and link EV adoption with domestic assembly and local value creation. As a signatory to the **Accelerating to Zero Coalition**, Kenya has endorsed the objective of reaching 100% ZEV sales for new LDVs by 2040. Achieving this milestone will be critical for advancing the country's national e-mobility goal of reaching 100% ZEV sales across vehicle segments by 2050.

# Implications of the 2040 EV Transition Pathway

A 2040 transition to 100% electric LDV sales would require a significant shift from the segment's current business-as-usual trajectory, particularly given Kenya's continued reliance on used ICE imports. We conducted a scenario analysis comparing a business-as-usual pathway with an EV transition pathway, where EVs reach 100% of annual LDV sales by 2040. This comparison helps assess the scale of market change required and the implications for energy demand and emissions reduction.

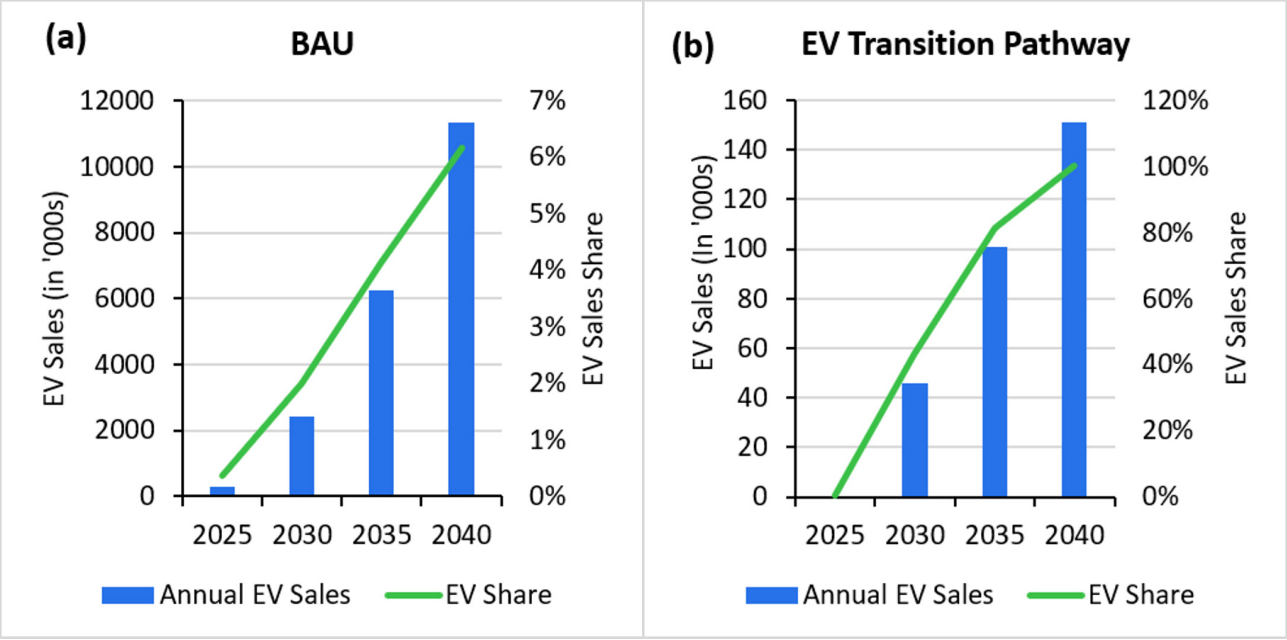


***Figure 1: Projected annual electric LDV sales and share of LDV registrations under business-as-usual (BAU) and EV transition scenarios***

Annual electric LDV sales in the BAU scenario would remain below 3,000 in 2030 and scale to only ~11,000 units or 6% of the new LDV sales share in 2040 if no targeted policy interventions are introduced (Figure 1a). This would leave the segment overwhelmingly dependent on used ICE vehicles through 2040. In contrast, achieving 100% electric LDV sales by 2040 under the EV transition pathway would require EV sales to scale much earlier,

[3] Government of Kenya. (2019) "Transport Sector Climate Change Annual Report: Performance and Implementation of Climate Change Actions." Ministry of Transport, Infrastructure, Housing, Urban Development and Public Works. Nairobi, Kenya. https://www.kcaa.or.ke/sites/default/files/publication/Transport_Sector_Climate_Change_Annual_Report.pdf

[4] Energy and Petroleum Regulatory Authority. (2026) "Biannual Energy & Petroleum Statistics Report: Financial Year 2025/2026." https://www.epra.go.ke/sites/default/files/2026-03/Biannual%20Statistics%20Report%202025-2026_1.pdf

reaching more than 40% of annual LDV sales by 2030 and more than 80% by 2035 (Figure 1b). This underscores the importance of early action to build the market conditions required for large-scale LDV electrification.

Achieving electrification goals under the EV transition pathway is also critical if Kenya is to reach its net-zero goals and energy security objectives. Under the business-as-usual scenario, LDV fuel demand and $CO_2$ emissions are projected to increase by approximately 60% by 2040 relative to 2025 levels (Figure 2a and 2b), reinforcing Kenya's dependence on imported petroleum. In contrast, the EV transition pathway could reduce cumulative fuel demand by ~5 billion liters over 2025-2040 relative to the business-as-usual scenario, with cumulative $CO_2$ emissions savings of about 13.2 million metric tons from the LDV segment.

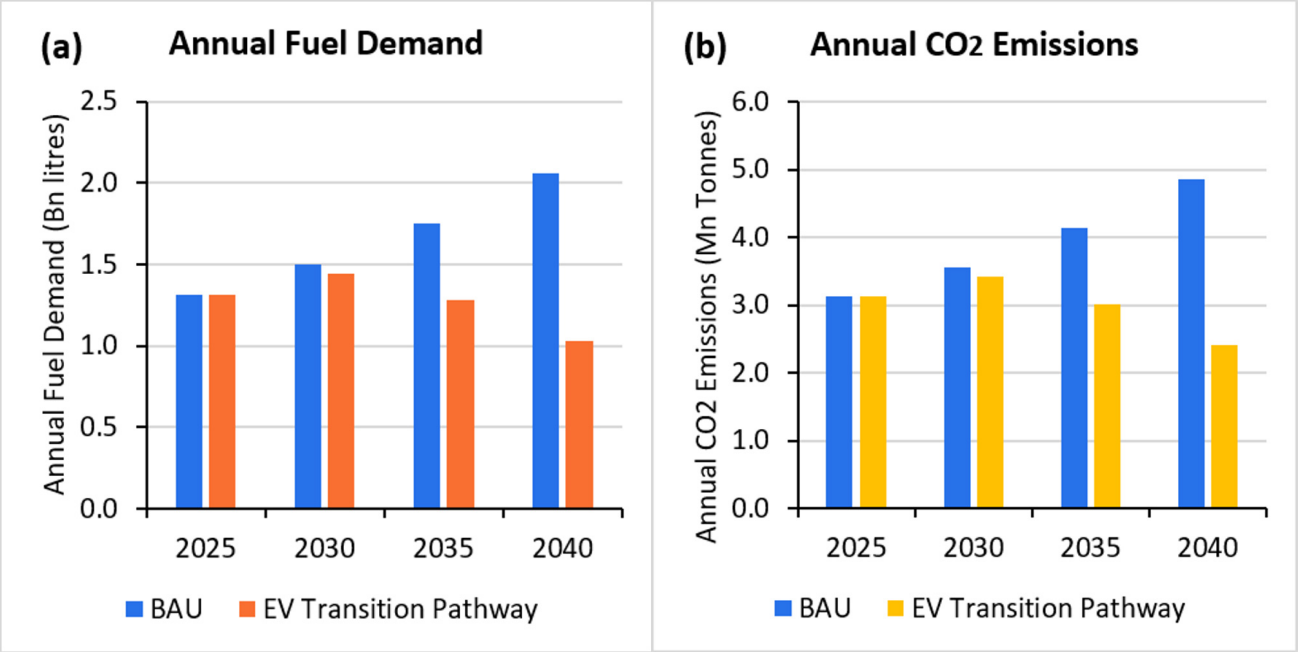


***Figure 2: Projected fuel demand and CO2 emissions in business-as-usual (BAU) and EV transition scenarios***

The EV transition pathway also has important implications for energy-sector and infrastructure planning. The growing EV fleet under this scenario would generate electricity demand of approximately 3,000 million kWh by 2040 (Figure 3), requiring a coordinated charging infrastructure development framework across public and private charging networks. With nearly 90% of electricity already generated from renewable sources, this electrification pathway can deliver significant lifecycle emissions benefits.

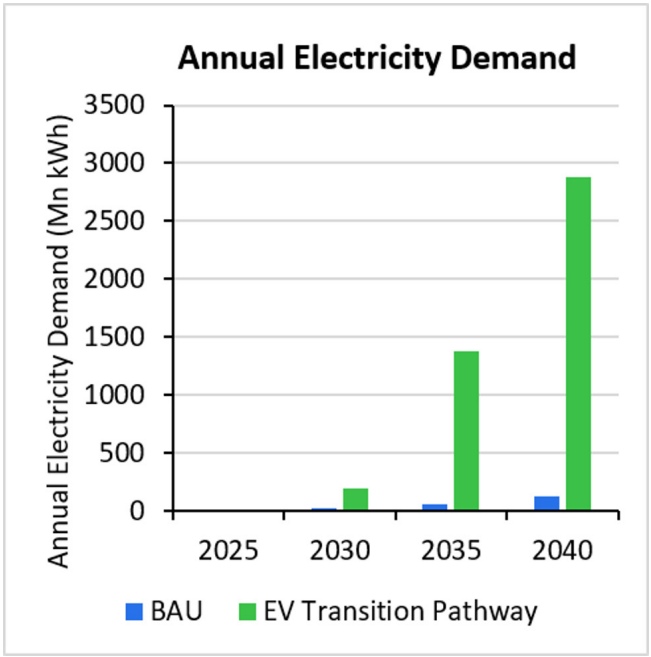


***Figure 3: Projected electricity demand in business-as-usual (BAU) and EV transition scenarios***

# Policy Framework for Scaling LDV Electrification

The scenario results show that reaching 100% electric LDV sales by 2040 will require early market formation within this decade. This will depend on coordinated policy action that creates demand, reduces cost barriers, limits continued reliance on inefficient used ICE imports, and links EV adoption with domestic assembly and local value creation.

### 1. Promote fleet-electrification to create early market demand

The National E-Mobility Policy already proposes electrifying 3,000 government fleet vehicles by 2027, with increased local content requirements. Extending this approach to private fleet operators through phased electrification targets would help scale EV adoption in Kenya. Uganda's recent policy to electrify public transport, including taxis, by 2030 provides a relevant regional reference,[5] while California's Clean Miles Standard shows how fleet-based targets can be structured for ride-hailing platforms.[6] Kenya's ride-hailing segment is already seeing a gradual uptake of EVs, with companies such as Rideence Africa and MojaEV deploying EVs to taxi drivers. Rideence Africa Ltd. has entered into a partnership with Associated Vehicle Assemblers to locally assemble electric taxis, with a target of achieving 60% local content.[7] This illustrates how fleet electrification can accelerate demand for electric LDVs and support domestic industry development by strengthening the business case for local assemblers, suppliers, and financiers.

### 2. Reduce upfront cost barriers through targeted financing

Kenya could complement fleet electrification targets with dedicated financing models for electric LDVs. SBM Bank Kenya's recent launch of KES 1 billion Green Finance Facility for electric and hybrid vehicles shows that domestic financial institutions are beginning to support EV adoption. However, high-utilization LDV fleets such as taxis and ride-hailing vehicles will require more targeted financing solutions that reduce upfront cost barriers. Rwanda's Umurabyo electric taxi model provides a useful regional reference bringing together NCBA Bank Rwanda for 100% vehicle financing, Kabisa for vehicle supply, charging, and after-sales support, and insurance partners for risk coverage. A similar partnership-based financing model could help Kenya reduce upfront cost barriers for taxi and ride-hailing operators.

### 3. Leverage East African Community (EAC) tariff mechanisms to accelerate EV adoption

Kenya could use EAC tariff stay-of-application mechanisms to make electric LDVs more affordable in the near term while gradually building local assembly capacity. Under the EAC Common External Tariff,[8] completely built-up passenger cars generally face a 25% import duty, while completely knocked-down assembly kits attract lower duties, creating an existing incentive for domestic assembly. Kenya has already used this mechanism to support local industry development by maintaining duty exemptions for completely knocked-down kits and applying a higher 35% duty on completely built-up passenger cars. Building on this approach, Kenya could consider a time-bound reduction in import duties on completely built-up electric LDVs, similar to Rwanda's full import-duty exemption for EVs,[9] to stimulate early market demand. This measure should be transitional, with incentives gradually shifting toward locally assembled EVs, completely knocked-down and semi-knocked down operations, and local content development as domestic assembly volumes increase, ensuring that early EV demand supports domestic automotive industry development rather than remaining import dependent.

### 4. Use production-linked incentives to support EV assembly and local value creation

Setting ambitious EV targets is a crucial first step in driving the clean mobility transition, but achieving them requires a comprehensive policy ecosystem that addresses key barriers such as affordability, consumer demand, manufacturing capacity, and investment gaps. On the supply side, fiscal incentives are crucial for promoting domestic EV production and increasing the supply of affordable EVs.

[5] Electrive. (2026) "Uganda targets fossil fuel free public transport by 2030." https://www.electrive.com/2026/05/08/uganda-targets-fossil-fuel-free-public-transport-by-2030/
[6] California Air Resources Board. Clean Miles Standard. https://ww2.arb.ca.gov/our-work/programs/clean-miles-standard
[7] Kuhudzai, R. (2026) Rideence to start local assembly of electric vehicles at AVA plant in Mombasa, Kenya. CleanTechnica. https://cleantechnica.com/2026/02/13/rideence-to-start-local-assembly-of-electric-vehicles-at-ava-plant-in-mombasa-kenya/
[8] East African Community. (2025) "EAC common external tariff- version 2022, as updated June 2025." https://eabc-online.com/download/eac-common-external-tariff-version-2022-as-updated-june-2025/?wpdmdl=11694&refresh=6a0591ec475661778749932
[9] US Department of Commerce, International Trade Administration. (2020) "Rwanda- Import tariffs." https://www.trade.gov/country-commercial-guides/rwanda-import-tariffs

Kenya may draw lessons from countries that have adopted production-linked and investment-linked incentives to promote local manufacturing. India's scheme to attract global EV manufacturers and position the country as an EV manufacturing hub requires a minimum investment of USD 500 million and 25% domestic value addition within 3 years, rising to 50% within 5 years.[10] In Thailand, manufacturers must produce two battery electric vehicles (BEVs) locally for each imported unit to qualify for import duty and excise tax benefits, eventually increasing to three per unit.[11] In South Africa, the government has announced a 150% tax deduction for qualifying investment in EV and hydrogen vehicle production starting in 2026.[12]

For Kenya, similar incentives could help scale emerging partnerships between local assemblers and global vehicle manufacturers while creating multiplier effects by increasing use of existing assembly plants, expanding demand for local parts and services, and creating skilled employment across the EV value chain.

### 5. Leverage regulatory frameworks to build industrial competitiveness

Kenya's LDV EV ecosystem is still at an early stage of development, but recent market activity points to a growing industrial opportunity. Associated Vehicle Assemblers (AVA) has started local assembly of electric cars, while TAD Motors, Kenya's first local EV assembler, has unveiled five locally assembled EV models priced competitively with used ICE vehicles, targeting to scale assembly to 5,000 units and 80% local content.[13]

In this context, complementing EV policy goals with vehicle efficiency regulations would be essential for creating market certainty and can play a key industrial policy role by encouraging manufacturers, importers, and assemblers to offer more efficient and zero-emission vehicles. Vehicle efficiency regulations can provide the regulatory certainty needed to de-risk investments by vehicle manufacturers, suppliers, and infrastructure providers. Manufacturing incentives are more likely to mobilize private investment when supported by efficiency regulations that require automakers to increase the share of EVs in their portfolios.[14]

## Acknowledgement:

*I would like to thank my colleagues Matteo Craglia, Jameel Jamhar, and Sacha Scheffer for leading the scenario assessment and analytical work that informed this article.*

[10] Government of India, Press Information Bureau. (2024) "New electric vehicle (EV) policy announced to promote domestic manufacturing and boost EV ecosystem." (Press Release No. 2102782). https://www.pib.gov.in/PressReleasePage.aspx?PRID=2102782&reg=3&lang=2
[11] Board of Investment of Thailand. (2025) "EV 3.5: Incentive package for electric vehicles and related infrastructure." https://www.boi.go.th/upload/content/EV%203.5ENG.pdf
[12] Department of Trade, Industry and Competition (DTIC), Republic of South Africa. (2025) "South Africa must accelerate new energy vehicle transition to secure competitiveness -Minister Ebrahim Patel." https://www.thedtic.gov.za/sa-must-accelerate-new-energy-vehicle-transition-to-secure-competitiveness-minister-tau/
[13] Business Daily Africa. (2025) "Tad Motors unveils its first electric cars assembled in Kenya." https://www.businessdailyafrica.com/bd/corporate/companies/tad-motors-unveils-first-kenya-assembled-electric-cars-5279888
[14] Hwang R, Jain A, Ramji, A. (2025) "Supply Side Regulations for Vehicles: A Necessary and Sufficient Condition for ZEV Transitions in Mexico." Institute of Transportation Studies, University of California, Davis. https://escholarship.org/uc/item/38p3m0f2

# Kenya's Next Charge: Unlocking Innovative Capacity for an Electric Mobility Transition

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For Kenya to maintain its momentum in achieving a reduction in national emissions by 32% by 2030,[2] the country needs to accelerate investment in cleaner, efficient, and affordable electric mobility. A deeper national commitment to implement an expansive capacity development strategy is crucial for sustaining this ongoing transition.

Africa has seen a rapid increase in electric vehicles (EVs), with more than 30,000 adopted across the continent as of mid-2025.[3] Although this number is low in comparison to millions of vehicles in other regions, it supports the projection for Africa's EV market to surpass $7 billion by 2028.[4] Kenya is well positioned to lead EV adoption, as more than a quarter of all African-based EV companies operate in the country. This growing investment in the Kenyan EV market has been facilitated by the country's commitment to import parts and locally manufacture EVs through policies that exempt excise duty and value-added tax (VAT) for EV parts and locally manufactured and assembled EVs.

Other evidence-based strategies in Kenya that have given citizens greater access to finances have increased uptake of EVs. Through mobile money actors such as Safaricom, public-private partnerships such as Fortune Credit's financing program, and asset financing organizations such as Watu Credit,[5] Kenya developed a dependable route for thousands of electric two-wheeler riders. The desire to ride electric two-wheelers has

[1] ARC Ride Kenya is a company providing two-wheel electric vehicles and a battery swapping service.
[2] Ministry of Roads and Transport. (2026) "National Electric Mobility Policy to Promote Development and Enhance Adoption of Electric Mobility in Kenya."
[3] Ashay A, Gorodetsky D. (2026) "Beyond the Tipping Point: Financing Kenya's Electric Two-Wheeler Growth." William Davidson Institute, University of Michigan. https://wdi.umich.edu/wp-content/uploads/Beyond-the-Tipping-Point-Financing-Kenyas-E2W-Growth-Intellecap-WDI-Final.pdf
[4] Ashay A, Gorodetsky D. (2026) Same as above.
[5] Watu Credit. (Accessed 2026) "Kenya Mobility Financing ‹ Kenya: About Us – Watu." Watu Credit, https://watu.com/kenya/mobility/#why-watu

***Figure 1. (clockwise from left) A rider on an electric 2-wheeler; a rider accesses a charged battery from the battery-as-a-service facility; a technician works on an electrical charging unit.***

increased in Kenya, particularly due to the success of lowering the total cost ownership below that for most internal combustion engine motorcycles.

In 2025, Kenya registered 25,277 new electric motorcycles that constituted 15.3%[6] of all motorcycles registered for the year. This is expected to increase to 25% through the initiatives undertaken by Kenya and collaborative partners from the energy and electric mobility industries. These initiatives underscore the country's commitment to a just transition that includes and empowers thousands of low-income households.

## Adopting Advanced Technology for Energy Consumption

To achieve the commitments underscored in the **2026 National Electric Mobility Policy**,[7] Kenya could use the ongoing EV adoption momentum to push for a more concerted transition.

Local policies that facilitate advanced technologies, including renewable energy sources, to support EV operations would promote EV adoption across the country. Kenya generates 93% of its consumed electricity[8] through renewable energy sources amounting to over 12,400 MW. However, the energy generation from the national grid is not sufficient to sustainably meet the charging infrastructure demand for the rapidly growing EV

[6] Kuhudzai RJ. (2026) "Electric Motorcycles Reach 15.3% Market Share of New Registrations in Kenya in 2025." CleanTechnica. https://cleantechnica.com/2026/02/09/electric-motorcycles-reach-15-3-market-share-of-new-registrations-in-kenya-in-2025/.

[7] Ministry of Roads and Transport. (2026) "National Electric Mobility Policy to Promote Development and Enhance Adoption of Electric Mobility in Kenya."

[8] Adeyemi S. (2026) "Kenya Suspends $1 Billion Microsoft Data Centre as Energy Shortfall Raises Doubts over Africa's AI Ambitions." Business Insider Africa https://africa.businessinsider.com/local/markets/kenya-suspends-dollar1-billion-microsoft-data-centre-as-energy-shortfall-raises/hdtfmxz

sector. Collaboration of the Kenya government with EV companies to unlock finance mechanisms for expanding advanced renewable energy technologies could help address this need.

Additionally, facilitating access to independent solar energy resources for the charging infrastructure can offset the strain on Kenya's electric grid.[9] If executed accurately and efficiently, such a solution could provide power to 30–40% of EV charging networks. A regulation to ensure quality implementation and maintenance could be added. In addition, policies that exempt excise duties, VAT, and levies will enable EV companies to better and more efficiently support Kenya's clean energy consumption. Simultaneously, such a regulation and funding sources would enable the country to explore avenues for expanding its energy capacity without placing this burden on the government.

## Building a Leading Workforce to Sustain the EV Sector

The EV sector could help Kenya reduce youth unemployment and achieve Sustainable Development Goal (SDG) 8,[10] which aims to "Promote sustained, inclusive and sustainable economic growth, full and productive employment, and decent work for all" by 2030. Although Kenya has made strides in reducing the unemployment rate to less than 13% for the entire population, the rate among people 18 to 35 years-old reportedly remains above 67%.[11] According to estimates, the EV sector will create a direct route to employment for more than 100,000 Kenyans.[12] However, equipping these people with knowledge and skills to eventually work at all levels in the EV sector would require a capacity development strategy. This need is highlighted by the fact that millions[13] of Kenyan youth who enter the workforce are severely under-skilled and under-prepared to execute the responsibilities of their employment. Without this advanced capacity development, Kenyans would be unable to prevent a degradation in product and service quality and reduce the risk of health and environmental harm.

Academic institutions such as Jomo Kenyatta University of Agriculture and Technology (JKUAT) recognize the need for capacity development and have made efforts in collaborating with ARC Ride in building the next generation of African leaders across the EV sector. However, to guarantee an effective and dependable national level workforce that can maintain the transition to electric mobility, Kenya's executive leadership may need to implement a plan that complements capacity building with innovative technologies and tools.

## Inspiring Africa Electric Mobility Transition

Kenya has paved a way for other African countries to follow suit in initiating electric mobility as part of their clean energy transition. Additional policies, funding mechanisms, and technologies could help Kenya demonstrate that electric transportation can be a sustained, affordable, reliable, and clean option.

[9] Adeyemi S. (2026) Same as above.
[10] United Nations Department of Economic and Social Affairs. (Accessed 2026) "Goal 8." United Nations, https://sdgs.un.org/goals/goal8
[11] The Federation of Kenya Employers (FKE). "Youth Employment." https://www.fke-kenya.org/policy-issues/youth-employment.
[12] Rikhotso DH.(2025) "Kenya's EV Sector to Generate 100,000 Jobs by 2030." The Habari Network. https://www.thehabarinetwork.com/kenyas-ev-revolution-poised-to-create-100000-jobs-forge-new-e-mobility-hub
[13] The Federation of Kenya Employers (FKE). "Youth Employment." Same as 11 above.

# Africa's Clean Mobility Transition: Policy Windows and Industrial Opportunity

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Sub-Saharan Africa stands at a critical crossroads in urban development. Driven by exponential population growth and structural congestion, megacities across the continent are struggling to balance macroeconomic resilience with the pressing realities of localized environmental degradation and global climate imperatives. The transport sector remains a primary driver of these dual crises, as an intensive consumer of volatile, carbon-intensive fossil fuels and contributor to public health risks through severe ambient air pollution.[2] In Nigeria, where urban transport networks have historically suffered from structural fragmentation, the Lagos State Government has initiated an ambitious transition toward public transport electrification.[3] Positioned as a vanguard strategy for sustainable mobility in the Global South, Lagos's e-bus deployment models how targeted institutional reforms and strategic infrastructure development can unlock significant green industrial pathways across African cities.

## The Strategic Focus on Mass Transit Electrification

With a population approaching 25 million residents, Lagos generates an estimated 22 million daily commuter trips. This massive mobility demand is mostly met by informal paratransit operators typified by decentralized, poorly regulated mini-buses (danfos) that dominate the urban landscape. To establish a more orderly and carbon-neutral mobility paradigm, the Lagos State Government has formulated an integrated transit vision centered on its regulated schemes across three tiers: Bus Rapid Transit (BRT) corridors, standard routes, and First and Last Mile services. The structural focus on the BRT network is strategic. These buses operate on fixed routes with high daily passenger volumes and rigorous duty cycles, making them prime candidates for maximizing environmental and economic returns on vehicle electrification.

To fulfill the city's broader mobility mandates while aligning with the Lagos Climate Action Plan's long-term goal of a zero-carbon urban profile by 2050, the state requires a structured baseline of at least 15,000 high-capacity mass-transit vehicles. Current policy projections outline a diversified, multi-fuel target framework consisting of

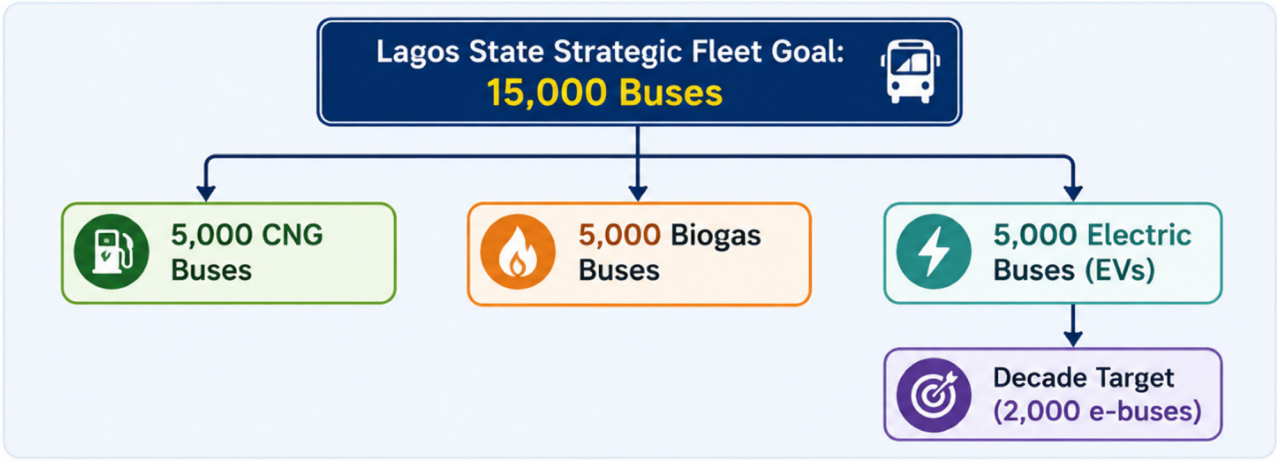


***Figure 1. Strategic Clean Bus Fleet Transition Framework for Lagos State's Sustainable Mobility Agenda (2025–2035)***

[1] Lagos Metropolitan Area Transport Authority
[2] Salisu UO, Odewumi SG, Abdul-Azeez FI, Ogunbiyi ME. (2022) Struggle for Sustainable Public Transport in Southwestern Nigerian Cities. Journal of Sustainable Urban Development 5(4):132-147. https://doi.org/10.52326/JSS.UTM.2022.5(4).07.
[3] Lagos State Government. (2024) Lagos State Transport Policy. Ministry of Transportation. https://www.lamata-ng.com/wp-content/uploads/2025/04/LAGOS-STATE-TRANSPORT-POLICY-.pdf

5,000 compressed natural gas buses, 5,000 biogas units, and 5,000 battery-electric buses. To implement this vision, Lagos Metropolitan Area Transport Authority (LAMATA) has set a rolling, decade-long procurement target of 2,000 electric buses, which translates into a baseline requirement of approximately 200 e-buses annually. This phased approach is deliberately designed to allow operators to expand grid connections, scale-up specialized technician capabilities, and continually absorb localized operational data.

## Operational Realities and Grid Integration

Translating public transit electrification from a high-level policy document into a daily operational reality requires navigating severe infrastructural and environmental constraints. Initial real-world pilot runs in Lagos have demonstrated strong operational resilience: a small-scale pilot fleet logged over 200,000 cumulative kilometers across three core BRT corridors and two standard routes, carrying more than 293,000 passengers and averting over 300,000 kilograms of carbon dioxide emissions.[4] Each bus maintained a rigid operational profile consisting of five round-trips per day, six days a week, consuming an average of 250 kilowatt-hours per day.[5]

However, scaling-up from a limited pilot to a sprawling multi-depot fleet poses severe infrastructure challenges. Foremost among these is grid readiness and charging management within a constrained domestic energy sector. The current deployment infrastructure depends on concentrated 120-kilowatt fast-charging stations. Integrating thousands of such high-load components onto the municipal grid can impose severe stress on the power system, leading to localized voltage drops, increased reactive power losses, and an overall deterioration of the utility power factor if not managed carefully.[6] Consequently, transitioning to larger fleets requires structural power upgrades, automated off-peak smart charging schedules,[7] and the strategic integration of decentralized solar-powered charging hubs to buffer peak demand.

## Institutional Coordination and Green Value Chains

A successful green mobility transition cannot be achieved through technology procurement alone; it requires cohesive institutional arrangements and a robust governance framework. In many African metropolises, transport policy is severely hampered by fragmented regulatory oversight, in which municipal planning authorities, national environmental councils, and ministries of energy frequently operate in isolation. LAMATA's position as a centralized metropolitan transport authority offers a useful blueprint for overcoming these governance barriers. By serving as a unified statutory body, LAMATA can effectively align regional transit initiatives with national climate strategies, such as Nigeria's Nationally Determined Contributions under the Paris Agreement.

[4] LAMATA. World Bank Group Academy Impact Program: Accelerating Urban E-Mobility Solutions Capstone Report – Milestone 1.
[5] LAMATA. World Bank Group Academy Impact Program: Accelerating Urban E-Mobility Solutions Capstone Report – Milestone 3.

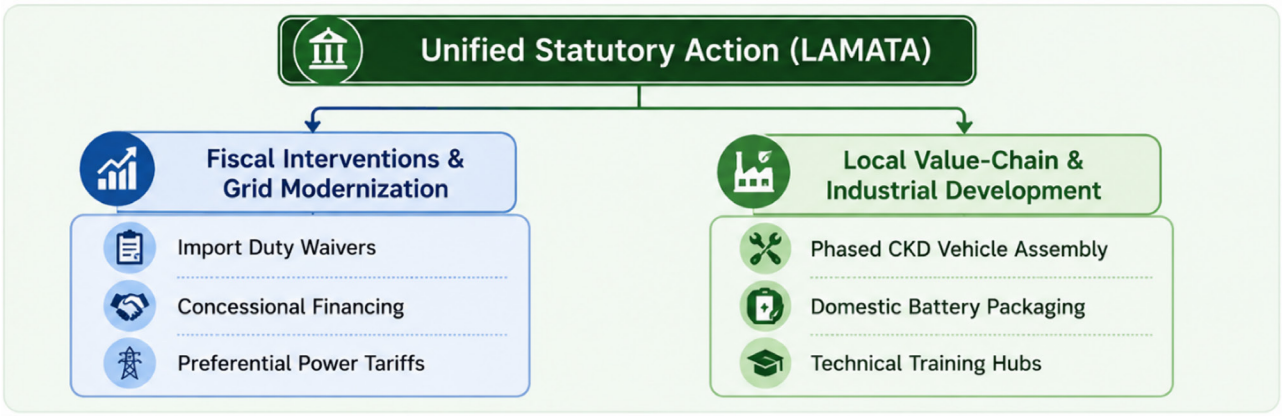


***Figure 2. Integrated Policy and Industrial Development Framework for Accelerating Electric Bus Deployment in Lagos State***

[6] Fokui WST, Saulo M, Ngoo L. (2022) Impact of Electric Vehicle Integration into the Nairobi Distribution Network. https://www.researchgate.net/publication/365353355_Impact_of_Electric_Vehicle_Charging_on_the_Nairobi_Aerial_Distribution_Network.
[7] Guschinsky N, Kovalyov, M, Rozin B, Brauner, N. (2021) Fleet and Charging Infrastructure Decisions for Fast-Charging City Electric Bus Service. Computers & Operational Research. 135, 105449. https://doi.org/10.1016/j.cor.2021.105449.

Crucially, this transition must be leveraged to drive localized industrial opportunities rather than simply establishing a reliance on imported foreign technology. Long-term strategic planning should use targeted policy windows, such as zero-emission manufacturing mandates and phased import substitution, to incentivize the establishment of domestic completely knocked-down assembly plants and regional battery-packaging operations.[8] Developing local assembly and maintenance supply chains not only reduces foreign exchange expenditure and exposure to international shipping disruptions but also serves as a powerful engine for creating skilled jobs and localized technical capacity building across the regional economy.

## Policy Recommendations and Strategic Outlook

For Lagos to fully realize its e-mobility ambitions and offer scalable lessons to other expanding cities across the Global South, it may be helpful for the state to transition from a reactive pilot framework to a proactive, comprehensive policy architecture. Policymakers and international development partners might consider three critical interventions:

- **Implement Targeted Fiscal and Financial Incentives:** The state could immediately introduce comprehensive import duty waivers for electric mass-transit vehicles and their core powertrain components. Simultaneously, establishing specialized green credit facilities and sovereign-backed concessional financing lines will lower capital costs, making electric fleet replacement highly competitive for private operators.
- **Institute Preferential Industrial Electricity Tariffs:** To guarantee the operational cost advantages of e-buses, energy regulators could consider establishing dedicated commercial EV charging tariffs. Providing affordable, predictable off-peak electricity pricing will ensure substantial fuel-to-power savings while encouraging operators to charge vehicles during periods of lower grid stress.
- **Mandate Local Content and Assembly Requirements:** Future large-scale public transit tenders could include progressive local assembly and technical servicing clauses. Partnering with international original equipment manufacturers to establish localized, completely knocked-down facilities will anchor the clean energy transition within the domestic economy, fostering technical expertise and regional supply chain security.[9]

Lagos's systematic approach demonstrates that clean mobility transitions in the Global South are not merely a distant environmental ideal, but a tangible, economically viable pathway for comprehensive urban renewal. Through strong institutional governance and sustained political commitment, Lagos is positioning itself as an influential, real-world reference point for innovation in sustainable urban transport across the African continent.

[8] Pei M, Hu Y, Han W, Qu X, Zou C. (2024) Life-Cycle analysis of economic and environmental effects for electric bus transit systems. Transportation Research Part D: Transport and Environment. 131, 104205. https://doi.org/10.1016/j.trd.2024.104205.
[9] Campos M, Mensión J, Estrada M. (2021) Charging operations in battery electric bus systems at the depot. Transportation Research Procedia. 58:103–110. https://doi.org/10.1016/j.trpro.2021.11.015.

# Dakar's Electric Leap: Lessons from the First 100% Electric BRT in Sub-Saharan Africa and a Roadmap for Scaling Up

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On 14 January 2024, Dakar launched the Sunu Bus Rapid Transit (BRT), a 100% electric system that became the first of its kind in sub-Saharan Africa. One hundred and twenty-one articulated buses now run 18.3 kilometers from the Petersen terminal to Guédiawaye, serving 23 stations on four lines, carrying around 60,000 passengers a day and delivering a 90% satisfaction rate.[1] The travel time on this congested axis has been halved. For a city where transport expenditure consumes 19% of the average household budget,[2] up from 12% a decade earlier, that is not a small thing. Yet the BRT covers one corridor. The harder question is whether Dakar can electrify at scale.

## A Transport Sector Under Pressure

Senegal's transport sector accounts for 35% of the country's energy-related greenhouse gas emissions, roughly 3.35 million metric tons of $CO_2$ equivalent in 2021.[3] It absorbs between 60–70% of national petroleum imports: a bill exceeding USD 1 billion a year. Air pollution from transport imposes an estimated USD 1.6 billion in annual economic damage on Dakar alone, with 56% of that figure attributable to particulate matter and other tailpipe pollutants.[4]

The vehicle stock compounds the problem. About 80% of vehicles imported into Senegal are more than 10 years old. Many of the minibuses operating under the AFTU (Association pour le Financement du Transport Urbain) system, roughly 2,300 vehicles, carrying more than one million passengers a day, date to the 1990s. They are expensive to maintain, heavy on fuel-use, and incapable of meeting modern emission standards. Any serious national climate strategy must start here.[5]

## What the BRT Got Right

The Sunu BRT was not simply a transport project. It was a proof that blended finance, a sound public-private partnership structure, and political commitment can deliver world-class clean transit in a West African city. Understanding how it worked is the first step to replicating it.

The total investment of approximately 135 million euros was assembled as a layered package: a senior commercial loan from Proparco (France's development finance institution), a subordinated tranche from the Emerging Africa Infrastructure Fund, a capital grant from the European Union, and technical assistance from the Private Infrastructure Development Group.[6] Charging infrastructure at the main depot was co-financed by the state and designed to scale.

[1] Dakar Mobilité and Conseil Exécutif des Transports Urbains Durables (CETUD). (2024–2025) Rapport d'exploitation Sunu BRT.
[2] CETUD. (2019) Fiche Synoptique N°10: Étude sur la situation de référence du BRT. Conseil Exécutif des Transports Urbains de Dakar.
[3] Agence Nationale de l'Aviation Civile et de la Météorologie (ANACIM) / Ministère des Transports. (2024) Tableau de bord énergie-transports, Sénégal.
[4] Seck Sow N, Thiam M, Ka I. (2026) "Senegal: EV Adoption Targets, BAU Assessment, and Intervention Package." E-Mobility Academy Capstone Milestone 2 Report, UC Davis / CETUD / EPT.
[5] Ka I. (2025) "Pétrole, gaz et mobilité électrique: le Sénégal face au virage stratégique de ses transports." Working paper, École Polytechnique de Thiès (EPT).
[6] Proparco, Emerging Africa Infrastructure Fund, Private Infrastructure Development Group. (2022–2023) Project documentation, Dakar BRT blended finance structure. See also: African Development Bank (2023). "Senegal BRT: Lessons in Blended Finance for Urban E-Mobility."

Operations were delegated to Dakar Mobilité, a consortium of Meridiam and the Fonds Souverain d'Investissements Stratégiques (FONSIS), under a 15-year concession managed by Conseil Exécutif des Transports Urbains Durables (CETUD). The key structural insight is the risk allocation: public actors and development finance institutions absorbed the risks that commercial banks would not touch (long tenors, first-in-market technology, and thin operator track records). Private operators took on performance risk with aligned incentives. That separation made the project bankable. It is also the template for what comes next.

# The Economics of Scaling Up: AFTU Minibuses

The BRT operates 121 buses on a single dedicated corridor. Scaling electrification to Dakar's 2,300 AFTU (Association pour le Financement du Transport Urbain) minibuses, which operate across the metropolitan network without dedicated infrastructure, requires the economics to work for individual owner-operators running on thin margins. A 2026 total-cost-of-ownership analysis by the capstone team from École Polytechnique de Thiès and the Conseil Exécutif des Transports Urbains Durables, supported by the World Bank Group E-Mobility Academy, tested what that would take.

Under a business-as-usual scenario (no new policies, no fiscal relief), an electric minibus (purchase price: USD 370,000) costs approximately USD 143,848 more than a diesel equivalent (USD 180,000) over 10 years, with a payback period of 15.5 years. No rational small operator makes that investment.

**Table 1. TCO scenarios for AFTU minibus electrification (10-year horizon, Dakar)**

| Scenario | 10-year EV vs. ICE cost gap (USD) | Payback period |
|---|---|---|
| Business as usual — no new policy | +USD 143,848 (EV more costly) | 15.5 years |
| Scenario 1: public depot infrastructure support | +USD 118,142 (EV more costly) | 13.7 years |
| Scenario 2: Sc. 1 + 33% purchase price relief | −USD 46,989 (EV cheaper) | 4.7 years |

*Source: Seck Sow, Thiam & Ka (2026). Capstone Milestone 2, World Bank Group E-Mobility Academy. ICE price USD 180,000; EV price USD 370,000; utilization 200 km/day.*

Two targeted interventions flip the calculus. A first scenario adds public co-financing for depot charging infrastructure. This reduces the payback period to 13.7 years and the 10-year cost premium to approximately USD 118,000, not enough on its own. A second scenario stacks a 33% reduction in electric vehicle (EV) purchase price, achievable through import duty, value-added tax (VAT), and excise exemptions, on top of infrastructure support. Under this combined scenario, the electric minibus becomes cheaper than diesel over 10 years by nearly USD 47,000, with a payback period of just 4.7 years. That is commercially viable.[7]

The capstone recommends a phased adoption target: 30% of the AFTU fleet electrified by Year 10, or approximately 690 e-minibuses, with milestones of 230 vehicles by Year 3, 345 by Year 5, and 690 by Year 10. Each minibus is assumed to share one 100-kilowatt charger with three other vehicles. By Year 10, this requires roughly 173 chargers drawing a combined 17.3 megawatts, a load that demands coordinated planning with SENELEC, the national utility, well in advance of deployment.

# Critical Enablers and the Gaps

The BRT experience and the AFTU modeling point to three enabling conditions:

**Blended finance at the right risk layer:** Development finance institutions are needed to cover the risks commercial banks will not. For AFTU minibuses, the equivalent of the BRT's senior-subordinated structure would be a dedicated leasing facility or guarantee scheme for individual operators, capitalized by a public institution such as FONSIS (Fonds Souverain d'Investissements Stratégiques) or a new green transport fund. Without this, high

[7] Seck Sow et al. (2026), same as note 2. TCO model assumptions: ICE minibus purchase price $180,000; EV purchase price $370,000; AFTU utilization 200 km/day; electricity tariff industrial rate.

interest rates and short loan tenors, the norm in Senegalese retail lending, will make EV ownership unaffordable regardless of the underlying economics.

**Fiscal reform targeting the right lever:** A 33% price reduction for electric minibuses, equivalent to an estimated total tax expenditure of approximately USD 84 million over the adoption period, is the single most impactful instrument the modeling identifies. It shifts the purchase economics without requiring recurring operating subsidies, and it is available without new legislation, only political will.

**Grid readiness:** Senegal's electricity mix is improving: renewables reached 29.4% of generation in 2024.[8] But SENELEC's distribution network in many peripheral corridors is not ready for depot-scale charging loads. A national charging deployment plan, aligned with the AFTU rollout timeline, is needed now, not after the first 230 buses are ordered.

Against these enablers, the gaps are stark. Senegal has no adopted EV technical standard, no EV-specific import tariff classification, no end-of-life battery governance framework, and no formal national electromobility strategy. Without these foundations, private investors face unquantifiable regulatory risk, and operator adoption stalls before it starts. Closing these gaps is the priority task for the Ministry of Infrastructure and Land Transport (MiTTA) and CETUD in the near term.

## A Policy Window and a Model for the Region

Senegal has an unusual asset that most of its neighbors lack: offshore hydrocarbon revenues. The Sangomar oil field, now producing, and the Grand Tortue Ahmeyim liquefied natural gas project represent fiscal flows that, directed strategically, could capitalize the very transition that reduces fossil fuel dependence. A dedicated green transport fund, seeded by oil revenues and co-financed by development finance institutions, could cover depot infrastructure, EV leasing guarantees, and the fiscal cost of import exemptions without crowding out the national budget.

The comparison with Rwanda is instructive. Rwanda's early leadership in EV adoption rests on three pillars: no import duties on EVs, a clear national EV policy, and upfront public investment in charging infrastructure.[9] Senegal has something Rwanda lacks: industrial scale and a proof of concept already operating in a demanding urban environment. What Senegal needs is the regulatory architecture Rwanda built.

The Dakar BRT was not just a transit project. It demonstrated that African cities can deliver clean, commercially viable, high-performance public transport. Extending that demonstration from 121 dedicated buses to 2,300 mixed-network minibuses, and eventually to the national fleet, is the clean mobility challenge of the decade. The economics are achievable. The policy tools are known. The window, opened by both climate urgency and new hydrocarbon revenues, is open now.

[8] SENELEC (2024). Rapport annuel, mix électrique Sénégal.
[9] Ka (2025), same as note 1; Rwanda Utilities Regulatory Authority (RURA). (2023). EV Policy Framework. Kigali.

# MARKET WATCH

# Global South's Expanding EV Footprint: Doubling market shares in 2026 Q1

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Global passenger electric vehicle (EV) sales reached 3.8 million units in the first quarter of 2026, accounting for 22% of total light-duty passenger vehicle (LDV) sales.[1] While China remains the single largest sales market, Q1 2026 witnessed an interesting shift compared to 2025: the country's share of global light-duty passenger EV sales declined to 47% from 63% in 2025, while the European Union increased its share to 23% from 14% in 2025. Most importantly, Global South emerging markets, excluding China, almost doubled their worldwide light-duty passenger EV sales to 9% in Q1 2026 from 5% in 2025 — see Figure 1.[2] Their growing role in driving demand remains an important structural shift signaling increasing links to industrial policy.

## Global South countries, excluding China, contributed 9% of global passenger EV sale

Light-duty passenger EV sales across 11 Global South countries continued to leapfrog — together, these countries sold over 341,000 EVs in Q1 2026. If the momentum persists, this number could cross the 1 million mark this year for the first time. These 11 countries along with China made up 41% of total global LDV passenger sales, and 56% of global light-duty passenger EV sales. All Global South countries except China saw an increase in EV sales share in Q1 2026, extending the upward trend from 2025. Meanwhile, China ended the first quarter of 2026 at 43% EV sales share, down from 56.2% in 2025.

**India and ASEAN[3]:** Key Asian markets, excluding China, reached a total volume of 240,370 light-duty passenger EV[BL2.1][AR2.2] sales in Q1 2026. In absolute volume terms, Thailand led the charge with 61,058 units sold, followed by India (57,657), Vietnam (51,966)[BL3.1][AR3.2], and Indonesia (34,685). Although low volumes, the Philippines recorded a significant jump, a three-fold increase in quarterly EV sales[BL4.1][AR4.2], reaching 11,674 units in Q1 2026, compared to 17,534 units sales for the entire year of 2025.

[1] Passenger vehicles include all light-duty vehicles used for personal mobility and EVs refer to Battery Electric and Plug-in Hybrid electric cars
[2] Global south countries assessed in the article are India, China, Indonesia, Thailand, Vietnam, Malayasia, Philippines, Mexico, Brazil, Colombia, Chile, and South Africa.
[3] ASEAN – Countries included are Indonesia, Thailand, Philippines, Vietnam and Malaysia

The key difference lies in the EV sales shares. The six countries in this cluster reached a cumulative light-duty passenger EV sales share of 12.3% in Q1 2026, compared to 9.6% in 2025. Vietnam, Thailand, and Indonesia reached 43.7%, 38.5%, and 23.3%, respectively, in Q1 2026 (Table 2) — levels comparable to several European markets and China (EU's share was 30.6% and China's was 43% in Q1 2026), highlighting the speed of electrification in these economies. In contrast, India's total was the lowest (4.5%), behind Malaysia and Philippines, both at 13.8% in Q1 2026.

**Latin America:** The combined electric car sales across Colombia, Mexico, Chile, and Brazil reached 98,833 units in Q1 2026, marking a cumulative EV market share of 10.2% compared to 7.6% in 2025. Brazil remains the largest EV market in the region, with sales of 60,000 units in Q1 2026, followed by Mexico at 24,928 units, Colombia at 10,541 units and Chile at 3,274 units. In terms of electric cars' share compared to total LDV passenger sales, Colombia led with 17.8%, followed by Brazil (12.7%) and then Chile and Mexico each at around 6.5% (Table 2).

**Africa:** South Africa, although a low volume market, registered a 1.7% EV market share in Q1 2026, crossing 1% sales share for the first time.

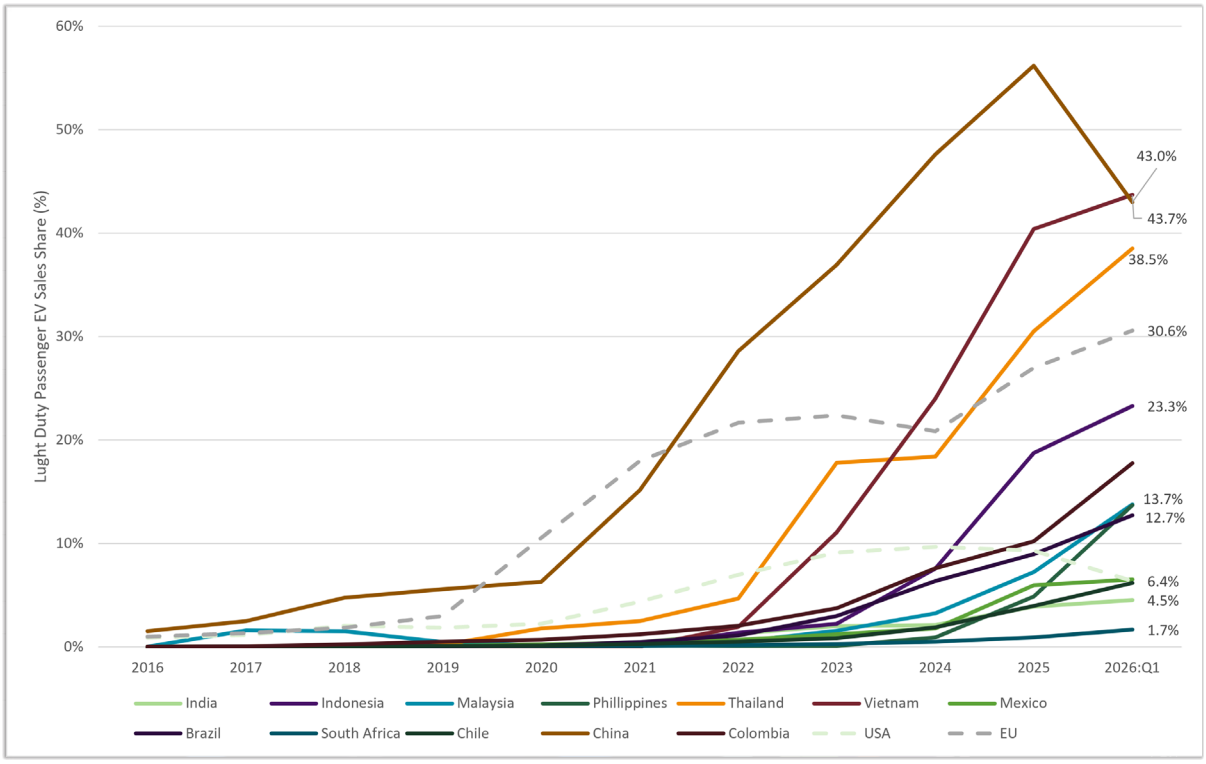


***Figure 1: Light duty passenger EV sales share in key markets, 2016 – Q1 2026***

India and Vietnam remain essentially 100% battery EV (BEV) markets. Indonesia, Malaysia, Thailand and Colombia have plug-in hybrid EV (PHEV) markets making up less than 15% of EV sales (Figure 2). In Q1 2026, BEV shares increased in Philippines, Thailand, Brazil and South Africa. In contrast, Chile saw PHEV shares increase to 40% of EV sales in Q1 2026 compared to 38% in 2025, while Mexico continued to be a PHEV dominant market at 59% share. For comparison, PHEV shares totaled around 35% in China, 32% in the EU and 16% in the US for Q1 2026 — a decline in PHEV share from 2025.

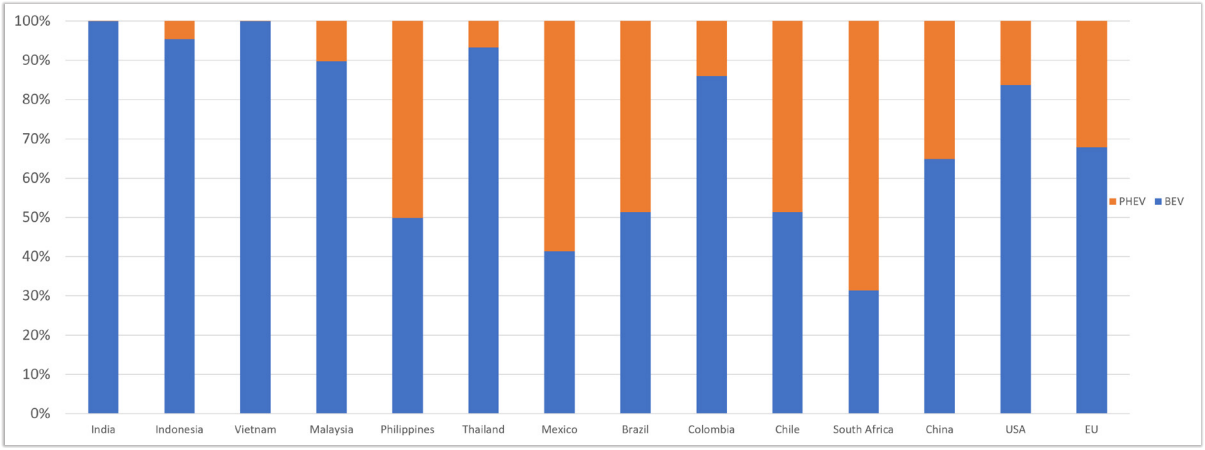


*Figure 2: BEV vs PHEV shares in key markets, Q1 2026*

# Global South Data Tracker

### Table 1: Total Light-duty Passenger Sales ('000 units)

| Region | Country | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026:Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Asia | India | 2967 | 3229 | 3395 | 2962 | 2417 | 3082 | 3792 | 4101 | 4275 | 4314 | 1273 |
| ASEAN | Indonesia | 857 | 830 | 859 | 769 | 378 | 644 | 764 | 762 | 651 | 589 | 149 |
| ASEAN | Thailand | 378 | 446 | 504 | 582 | 381 | 357 | 444 | 500 | 420 | 455 | 159 |
| ASEAN | Vietnam | 160 | 147 | 186 | 230 | 307 | 300 | 377 | 287 | 287 | 435 | 119 |
| ASEAN | Malaysia | 512 | 512 | 530 | 547 | 474 | 452 | 637 | 714 | 727 | 748 | 169 |
| ASEAN | Philippines | 285 | 362 | 284 | 289 | 169 | 199 | 254 | 323 | 352 | 359 | 85 |
| LATAM | Mexico | 1604 | 1530 | 1186 | 1315 | 949 | 1015 | 1086 | 1361 | 1496 | 1511 | 382 |
| LATAM | Brazil | 1688 | 1856 | 2102 | 2262 | 1616 | 1558 | 1577 | 1721 | 1948 | 1997 | 472 |
| LATAM | Chile | 229 | 269 | 314 | 279 | 187 | 296 | 295 | 210 | 209 | 213 | 53 |
| LATAM | Colombia | 216 | 204 | 225 | 230 | 163 | 204 | 212 | 147 | 167 | 209 | 59 |
| Africa | South Africa | 361 | 368 | 364 | 354 | 246 | 304 | 363 | 348 | 351 | 422 | 115 |
| Asia | China | 23050 | 23969 | 23111 | 21166 | 20071 | 21323 | 20701 | 21887 | 23567 | 23441 | 4203 |
| North America | USA | 17559 | 17241 | 17335 | 17049 | 14541 | 15032 | 13878 | 15644 | 15995 | 16261 | 3694 |
| Europe | EU | 11937 | 12574 | 12772 | 13014 | 9931 | 9691 | 9246 | 10525 | 10611 | 10803 | 2818 |

### Table 2: Light-duty Passenger EV Share of New Sales (%)

| Region | Country | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026:Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Asia | India | 0.0% | 0.01% | 0.04% | 0.03% | 0.2% | 0.5% | 1.3% | 2.0% | 2.1% | 3.9% | 4.5% |
| ASEAN | Indonesia | 0.0% | 0.01% | 0% | 0.02% | 0.0% | 0.1% | 1.4% | 2.2% | 7.6% | 18.8% | 23.3% |
| ASEAN | Thailand | 0.02% | 0.05% | 0.18% | 0.23% | 1.8% | 2.5% | 4.7% | 17.8% | 18.4% | 30.5% | 38.5% |
| ASEAN | Vietnam | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.9% | 11.1% | 24.0% | 40.4% | 43.7% |
| ASEAN | Malaysia | 0.02% | 1.61% | 1.54% | 0.46% | 0.1% | 0.3% | 0.5% | 1.6% | 3.2% | 7.2% | 13.8% |
| ASEAN | Philippines | 0.0% | 0.0% | 0.0% | 0.12% | 0.2% | 0.1% | 0.1% | 0.1% | 0.9% | 4.9% | 13.7% |
| LATAM | Mexico | 0.01% | 0.03% | 0.04% | 0.10% | 0.3% | 0.4% | 0.7% | 1.2% | 1.8% | 6.0% | 6.5% |
| LATAM | Brazil | 0.0% | 0.0% | 0.01% | 0.06% | 0.2% | 0.5% | 1.1% | 3.0% | 6.4% | 9.0% | 12.7% |
| LATAM | Chile | 0.0% | 0.02% | 0.03% | 0.08% | 0.1% | 0.3% | 0.5% | 0.9% | 1.9% | 4.0% | 6.2% |
| LATAM | Colombia | 0.02% | 0.07% | 0.25% | 0.53% | 0.7% | 1.2% | 2.1% | 3.8% | 7.6% | 10.2% | 17.8% |
| Africa | South Africa | 0.04% | 0.05% | 0.03% | 0.09% | 0.1% | 0.1% | 0.2% | 0.3% | 0.5% | 0.9% | 1.7% |
| Asia | China | 1.5% | 2.51% | 4.77% | 5.58% | 6.3% | 15.2% | 28.6% | 36.9% | 47.6% | 56.2% | 43.0% |
| North America | USA | 0.9% | 1.16% | 2.07% | 1.85% | 2.3% | 4.4% | 7.0% | 9.1% | 9.7% | 9.3% | 6.4% |
| Europe | EU | 1.0% | 1.33% | 1.89% | 2.98% | 10.6% | 18.0% | 21.7% | 22.4% | 20.9% | 27.0% | 30.6% |

### Table 3: Light-duty Passenger BEV Share of Total EV Sales (%)

| Region | Country | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026:Q1 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Asia | India | 0.0% | 92.6% | 100.0% | 99.1% | 98.9% | 99.7% | 100.0% | 99.7% | 99.9% | 99.9% | 100.0% |
| ASEAN | Indonesia | 0.0% | 37.2% | 87.5% | 62.2% | 84.1% | 95.9% | 99.3% | 99.1% | 99.7% | 95.2% | 95.4% |
| ASEAN | Thailand | 60.2% | 37.8% | 23.3% | 68.7% | 25.0% | 21.6% | 47.7% | 86.6% | 88.5% | 87.0% | 93.3% |
| ASEAN | Vietnam | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 100.0% | 99.7% | 99.8% | 99.9% | 100.0% | 100.0% |
| ASEAN | Malaysia | 100.0% | 1.7% | 0.8% | 1.7% | 13.0% | 23.0% | 42.8% | 83.3% | 94.3% | 89.8% | 89.8% |
| ASEAN | Philippines | 0.0% | 0.0% | 0.0% | 99.2% | 97.8% | 75.0% | 83.1% | 83.3% | 68.8% | 46.0% | 49.9% |
| LATAM | Mexico | 76.0% | 67.5% | 49.2% | 66.5% | 75.1% | 73.9% | 89.2% | 87.2% | 73.1% | 41.7% | 41.4% |
| LATAM | Brazil | 55.6% | 100.0% | 22.0% | 5.8% | 27.8% | 27.9% | 43.0% | 36.2% | 49.3% | 44.4% | 51.3% |
| LATAM | Chile | 0.0% | 75.0% | 53.5% | 63.6% | 62.8% | 59.8% | 70.5% | 72.9% | 75.3% | 61.7% | 51.3% |
| LATAM | Colombia | 52.8% | 62.2% | 44.4% | 62.6% | 58.8% | 33.4% | 44.0% | 64.2% | 83.2% | 87.4% | 86.0% |
| Africa | South Africa | 62.9% | 72.6% | 66.7% | 51.7% | 37.7% | 74.7% | 75.7% | 75.1% | 66.6% | 27.1% | 31.3% |
| Asia | China | 75.5% | 80.9% | 75.1% | 79.8% | 81.2% | 80.8% | 74.5% | 66.8% | 56.6% | 61.5% | 64.9% |
| North America | USA | 53.6% | 53.4% | 65.9% | 74.1% | 78.1% | 73.1% | 80.5% | 79.9% | 79.6% | 78.2% | 83.7% |
| Europe | EU | 47.7% | 51.1% | 56.6% | 64.0% | 51.3% | 50.3% | 56.0% | 65.5% | 65.6% | 64.8% | 67.8% |

# Acknowledgements

We would like to express our deep appreciation to all contributors, reviewers, and partners whose insights and collaboration made this edition of the Global South Center for Clean Transportation's *Majority Mobility* possible. We are especially grateful to the researchers, partners, and students who shared their time, expertise, and on-the-ground perspectives. Their contributions, and the knowledge exchanged across regions, are what give this publication its purpose and strength.

If you or your organization would like to contribute to a future edition of Majority Mobility, we welcome submissions and perspectives from across regions. Please reach out to us by email to continue the conversation.

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