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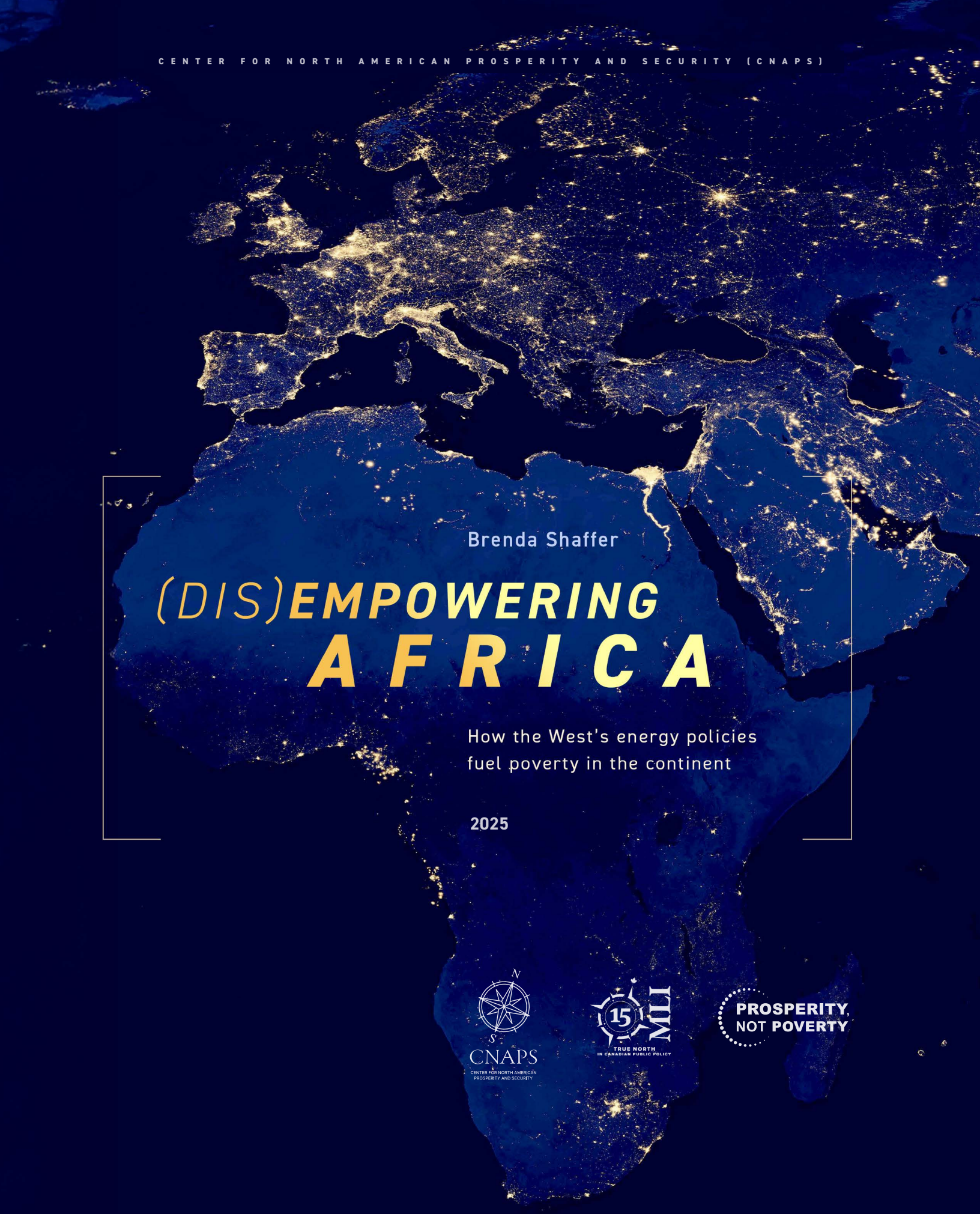

Brenda Shaffer

(DIS)EMPOWERING AFRICA

How the West's energy policies fuel poverty in the continent

2025

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Cover design: Renée Depocas
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The Center for North American Prosperity and Security is a project of the Macdonald-Laurier Institute (macdonaldlaurier.ca).

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Africa is the world's poorest continent – and the situation is growing worse thanks to misguided global energy policies that starve its fossil fuel industry of funding while forcing it to adopt costly, unreliable and inefficient renewable energy sources.

Africa currently has the lowest per capita energy use in the world. And yet, despite being home to significant fossil fuel reserves, Africa is being told by the World Bank, the International Energy Agency (IEA) and the G7 to effectively shun local energy resources and embrace a more poverty-stricken renewable future.

Western policymakers suggest that Africa can "leapfrog" from traditional biomass energy to modern renewable energy. However, there is no viable model or precedent for leapfrogging over fossil fuel use from traditional biomass to today's renewables. Today's renewable energy cannot provide reliable electricity without a baseload of stable energy from natural gas, coal, or nuclear.

Africa needs access to modern, cost-effective energy sources to prosper. Indeed, half of the population of sub-Saharan Africa does not even have access to electricity. Unfortunately, the G7, World Bank, and most multilateral development agencies – in defiance of their defined missions to reduce poverty – have halted loans and finance for fossil fuel production and electricity generation in Africa.

While developed nations enjoy the benefits of fossil fuels, Africa is told to go without for the good of the planet – even though the continent produces miniscule amounts of greenhouse gases compared to large emitters like China and the United States.

Unable to access international loans and funding for fossil fuel development, sub-Saharan African nations struggle to create enough power for their citizens. Meanwhile, everyday Africans are forced to burn biomass for their home energy needs – a toxic process that exposes users to potentially deadly smoke.

The West's denial of funding for conventional energy development in Africa has clear geopolitical implications: the funding cuts are strengthening China's influence in Africa, and nations there are turning to Beijing to fund their local fossil fuel resources. This increases China's influence in Africa and the likely fomentation of anti-Western sentiments and political instability – all of which are creating new security challenges for the West.

There are several steps that can be taken to reverse this unfortunate situation, including:

- The main funders of the World Bank and the IEA, including the United States and Canada, must demand that those agencies return to their defined mandates – the World Bank to poverty eradication and the International Energy Agency to energy security.
- The US, Canada, and other main donors should not allow the entities they fund to count partial electricity access as full electricity access. A solar energy unit that provides a few hours of electricity per day will not power machinery, refrigeration, water pumps, or clean cooking. This electricity access is highly limited in its ability to spur economic growth.
- The US and Canada must demand that the bank renew funding for fossil fuel projects, especially natural gas. Africa and the developing world need more fossil fuels to reduce poverty, not less.
- The US, Canada, and other major funders of the International Energy Agency must insist that the agency publishes accurate information in their reports – data based on contemporary facts, not just modeled scenarios.
- Further, the main funders of the IEA should demand full transparency from these organizations about the funding sources behind their research and policy programs and publications on

Africa – particularly on the funding they receive from China and other Western adversaries – and how these funds are used.

The World Bank, IEA, and UN agencies are advocating energy policies for Africa that are not working. The plain truth is, Africa needs fossil fuels. It is time to flip the moral high ground. Western nations and organizations that aspire to net-zero are condemning Africa to extreme poverty. It is time to support fossil fuel development in sub-Saharan Africa and allow it to lift the prospects and improve the lives of millions of impoverished Africans. ★

L'Afrique est le continent le plus pauvre – et voit sa situation se dégrader dû à l'illogisme des politiques mondiales sur l'énergie, qui privent son industrie fossile de financement et l'obligent à recourir à des sources coûteuses, incertaines et inefficaces.

Actuellement, l'Afrique enregistre la consommation d'énergie la plus faible par habitant au monde. Malgré ses importantes réserves de combustibles fossiles, elle se plie au diktat de la Banque mondiale, de l'Agence internationale de l'énergie (AIE) et du G7 en renonçant à ses sources locales au profit des importations, ce qui la condamne à un avenir renouvelable précaire.

Les décideurs occidentaux estiment que l'Afrique peut « sauter l'étape » des énergies fossiles en passant directement des sources traditionnelles (biomasse) aux énergies renouvelables contemporaines. Pourtant, aucun précédent viable n'existe. Les formes actuelles d'énergie renouvelable ne peuvent pas assurer une électricité fiable sans un apport minimal et stable d'énergie provenant du gaz naturel, du charbon ou de la combustion nucléaire.

L'Afrique a besoin d'énergies modernes et rentables pour assurer sa réussite. Or, près de la moitié de la population subsaharienne n'a pas d'électricité. Il est regrettable de constater que le G7, la Banque mondiale ainsi que la majorité des agences multilatérales de développement aient suspendu – en dépit de leur mission de réduction de la pauvreté – les prêts et le financement pour la production d'énergie fossile et d'électricité.

Les pays développés tirent parti des bénéfices de l'énergie fossile, tandis que l'Afrique doit s'en priver pour le bien de la planète, et ce, en dépit de sa production négligeable de gaz à effet de serre en comparaison avec les principaux émetteurs comme la Chine et les États-Unis.

Incapables d'obtenir du financement ou des prêts à l'échelle internationale pour le développement de son industrie fossile, les pays africains subsahariens peinent à produire suffisamment d'énergie pour leurs citoyens. Pour répondre à leurs besoins domestiques, leurs populations se voient contraintes de recourir quotidiennement à la biomasse – obtenue par un procédé toxique qui les expose à une fumée potentiellement mortelle.

Le déni de financement de la part de l'Occident pour la mise en valeur de l'énergie conventionnelle africaine entraîne des conséquences géopolitiques évidentes : puisque Beijing est appelé en renfort pour financer les énergies fossiles locales, ce déni permet de consolider l'influence de la Chine sur ce continent. La Chine renforce donc sa position en Afrique, une situation susceptible de nourrir des sentiments anti-occidentaux et d'engendrer de l'instabilité politique – posant ainsi de nouveaux défis de sécurité pour l'Ouest.

Les multiples mesures ci-après pourraient inverser la tendance :

- *Les principaux financeurs de la Banque mondiale et de l'AIE, incluant les États-Unis et le Canada, se doivent d'exiger de ces institutions qu'elles reviennent à leurs objectifs initiaux : éliminer la pauvreté pour la Banque mondiale et assurer la sécurité énergétique pour l'AIE.*
- *Les États-Unis, le Canada ainsi que divers autres principaux donateurs ne doivent pas permettre aux entités qu'elles financent de considérer l'accès partiel à l'électricité comme un accès complet. Une unité d'énergie solaire fournissant quelques heures d'électricité par jour ne peut pas faire fonctionner des machines, réfrigérer, pomper l'eau ou servir à la cuisson des aliments. Ce type d'accès présente des limitations significatives quant à sa capacité à stimuler la croissance économique.*
- *Les États-Unis et le Canada se doivent d'exiger de cette institution qu'elle renouvelle le financement des projets d'énergie fossile, notamment pour le gaz naturel. L'Afrique, tout comme le monde*

en développement, a besoin de plus d'énergie fossile pour lutter contre la pauvreté, pas moins.

- *Les États-Unis et le Canada ainsi que d'autres principaux financeurs de l'Agence internationale de l'énergie doivent enjoindre ces derniers à publier des renseignements précis dans leurs rapports – fondés sur des faits récents, et non pas sur des modèles.*
- *Par ailleurs, les principaux financeurs de l'AIE doivent exiger de ces derniers la transparence totale sur qui finance leurs recherches et programmes politiques, ainsi que leurs publications relatives à l'Afrique – en particulier si le financement provient de la Chine ou d'autres adversaires de l'Occident – et sur l'utilisation des fonds.*

La Banque mondiale, l'AIE ainsi que les agences onusiennes promeuvent des politiques énergétiques jugées inefficaces pour le continent africain. Pourtant, l'Afrique a clairement besoin d'énergies fossiles. Il est temps d'inverser le rapport de supériorité morale. Les nations et organisations occidentales prônant la neutralité carbone condamnent l'Afrique à une pauvreté extrême. Il est désormais impératif de promouvoir les projets d'énergie fossile en Afrique subsaharienne, afin d'améliorer les perspectives économiques et la vie de millions d'Africains en situation de précarité. ★

Energy access in Africa

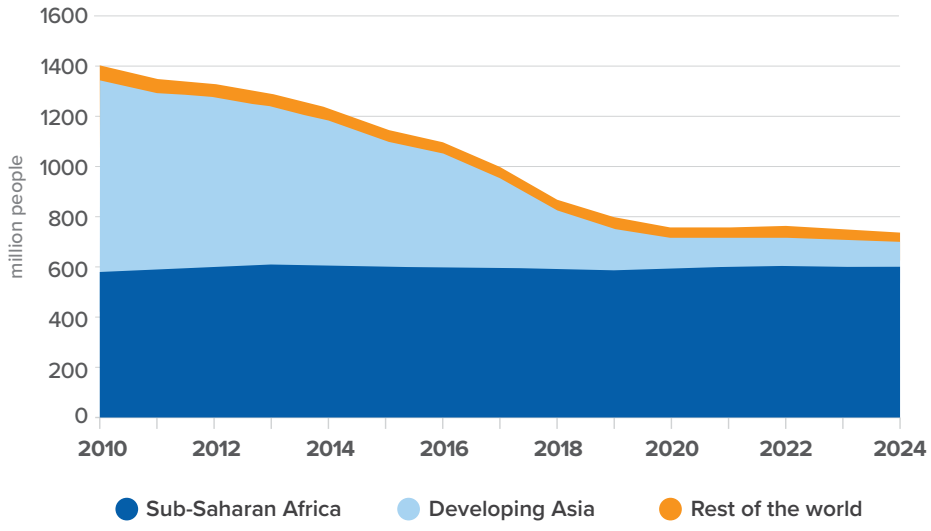
Africa is the world's economically poorest continent. Poverty continues to increase in Africa in contrast to all other regions of the world. Reliable and affordable electricity is a major factor in poverty eradication so one of the most significant factors preventing Africa's emergence from poverty is its lack of access to modern energy. While energy access continues to grow globally, in Africa is it in retreat. Africa has the lowest per-capita energy use in the world. The number of people in sub-Saharan Africa without access to electricity has grown since 2010 and now half of its population does not have access to electricity (Figure 1).

With little access to modern energy, 80 percent of sub-Saharan Africans cook their daily meals and heat their homes by burning traditional fuels – wood, dung, charcoal and other biomass. This exposes households in Africa to indoor pollution from smoke and fine particulate matter.

All people need some form of energy. Humans require energy for basic functions including heating, cooking and purifying water. Many in the West who support prohibiting financing for fossil fuels in the developing world believe that if people there have no access to fossil fuels, they will turn to solar, wind and hydropower. In reality, without access to affordable and reliable power from fossil fuels, most continue to burn dung and other biomass.

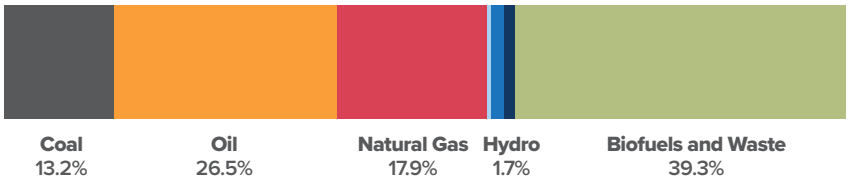
Blocking access to fossil fuels does not lead to people using more modern renewable energy, but instead to increasing their use of traditional biomass with all its accompanying health impairments. The International Energy Agency (IEA) and other multilateral organizations often count traditional biomass burning as "renewable energy," but doing so distorts the picture of energy use in Africa (United Nations 2025).

FIGURE 1: Number of people worldwide without electricity access between 2010 and 2024



Source: IEA 2024c.

FIGURE 2: Energy mix, total energy supply, Africa, 2022



Source: IEA Africa report 2022.

The IEA acknowledges that burning traditional biomass releases more carbon emissions than fossil fuels (IEA 2025, 71). Despite this acknowledgment – and the recognition that the path to lower emissions and pollution and improved public health is through fossil fuels – the IEA isn't willing to say the plain truth: Africa needs fossil fuels.

There are vast variations in energy access among the different regions of Africa: North Africa produces natural gas and thus has a relatively high proportion of people who have access to electricity as well as relatively a high percentage of clean cooking fuels. South Africa uses its domestic coal (and small amounts of nuclear energy)

to provide relatively high levels of electricity to its population. But the situation in sub-Saharan Africa, minus South Africa, is much bleaker.

There are also huge gaps between the access that rural Africans have to energy and the access available to those in urban centers. The continent's urban population has 2.5 times the access to electricity that the rural population does (World Bank Group 2024).

Natural gas is the main source of electricity generation in Africa if the calculation incorporates North Africa – which includes Egypt and Algeria, two major gas producers. However, in sub-Saharan Africa, oil and diesel are the main sources of electricity generation. Thus, the electricity that sub-Saharan Africa produces is relatively expensive and polluting (Figures 3 and 4).

Traditional versus modern forms of renewable energy

Until the nineteenth century, all humans used biomass – wood, dung, vegetation and charcoal – as their energy source. This traditional energy source, while considered "renewable," generates significant health impairment and hurts the environment as it is necessary to cut down forests to access the energy from wood. Today, 2.3 billion people on earth still primarily consume traditional forms of renewable energy.

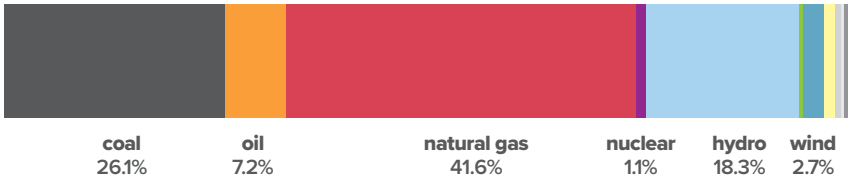
Modern renewable energy is composed primarily of hydropower, wind power, solar energy and geothermal energy. Modern renewable energy provides 7 percent of global energy consumption.

African nations produce significant quantities of oil, natural gas and coal. However, the majority of Africa's energy resources are exported: Africa produces 7 percent of the global oil supply. It exports more than 65 percent of its crude production and is a net importer of refined products. African countries produce three percent of global coal production, of which 28 percent is exported (IEA Undated). Africa produces four percent of global gas, of which it exports over 60 percent.

Africa has significant potential to increase its natural gas production: more than 40 percent of the world's gas volumes discovered in the 2010s are in Africa (Figure 5) (Cust and Zeufack 2023, 12).

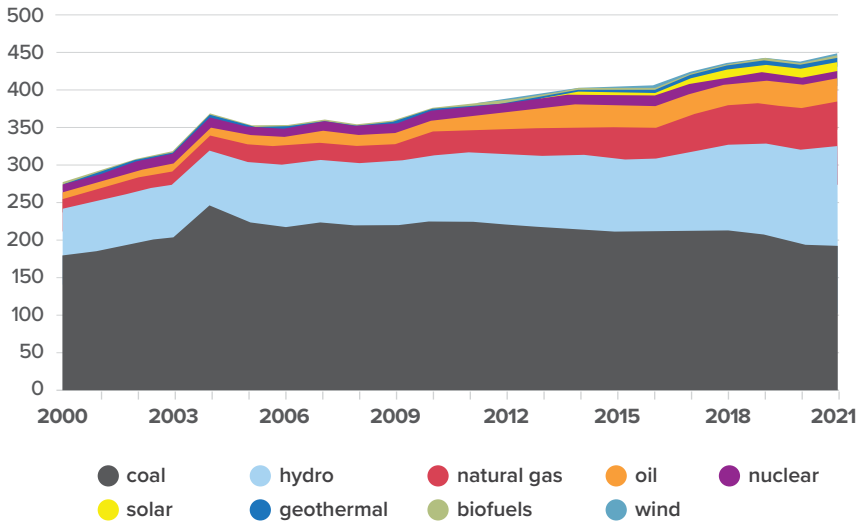
While in almost every region on the globe electricity access is growing, in Africa access is backtracking (Bearak 2025). However, the

FIGURE 3: Electricity generation sources, Africa, 2022



Source: IEA 2022.

FIGURE 4: The electricity mix within Sub-Saharan Africa (TWh)

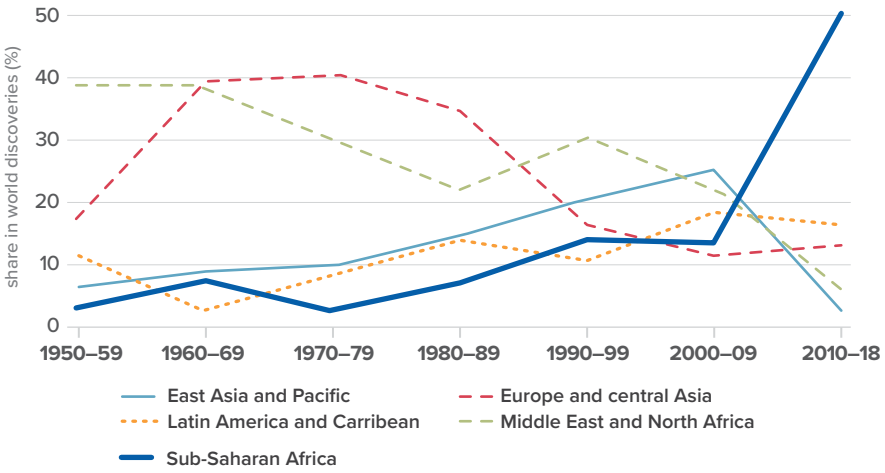


Source: IEA 2022.

statistics on the number of people without access to electricity don't tell the whole story. The story is bleaker. Among those counted as having electricity access, about half only have power for several hours a day. This means that power is not reliable and sufficient to support industry, water pumping, and refrigeration. Unreliable electricity means that modern medical services cannot be offered, since they are dependent on refrigeration which needs reliable power.

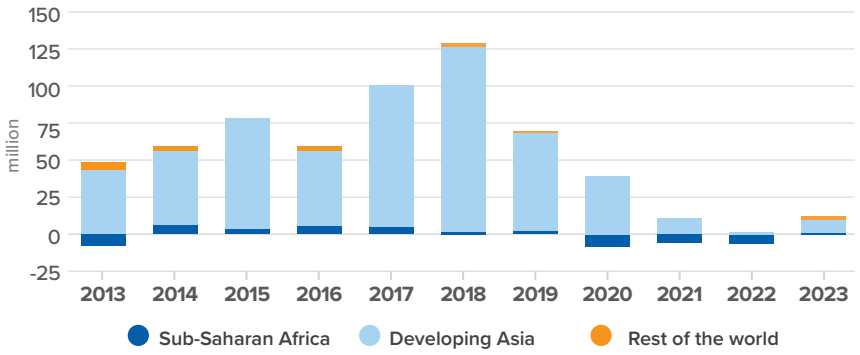
The West promotes off-grid solar in Africa in order to avoid use of fossil fuels. However, while off-grid solar can charge a cell phone and provide limited lighting, it cannot support the activities that

FIGURE 5: Giant oil and gas field discoveries, by region and decade, 1950-2018



Source: Based on Cust, Rivera-Ballesteros, and Mihalyi 2021. Note, the share of giant discoveries by decade and region is calculated as the number of giant discoveries by region in each decade divided by the total number of giant fields discovered in that decade in the world. .

FIGURE 6: Annual reduction in number of people without access to electricity by region, 2013–2023



Source: IEA Access to electricity database and IEA estimates.

enable economic growth. About a quarter of the new electricity access in sub-Saharan Africa in recent years is from off-grid solar energy (IEA 2024a). Thus, many of the new users do not have full electricity access, so they cannot rely on electricity to power tools, refrigeration and water pumps (Figure 6).

The link between economic growth and energy

There is a strong correlation between energy use and economic growth (Tinker and Mills 2025, 6; Kanagawa and Nakata 2008). Reliable and affordable energy is necessary to provide the most basic goods: a clean water supply and clean and safe cooking and heating. Energy access has a profound effect on all major development outcomes including health care, education and opportunities for women.

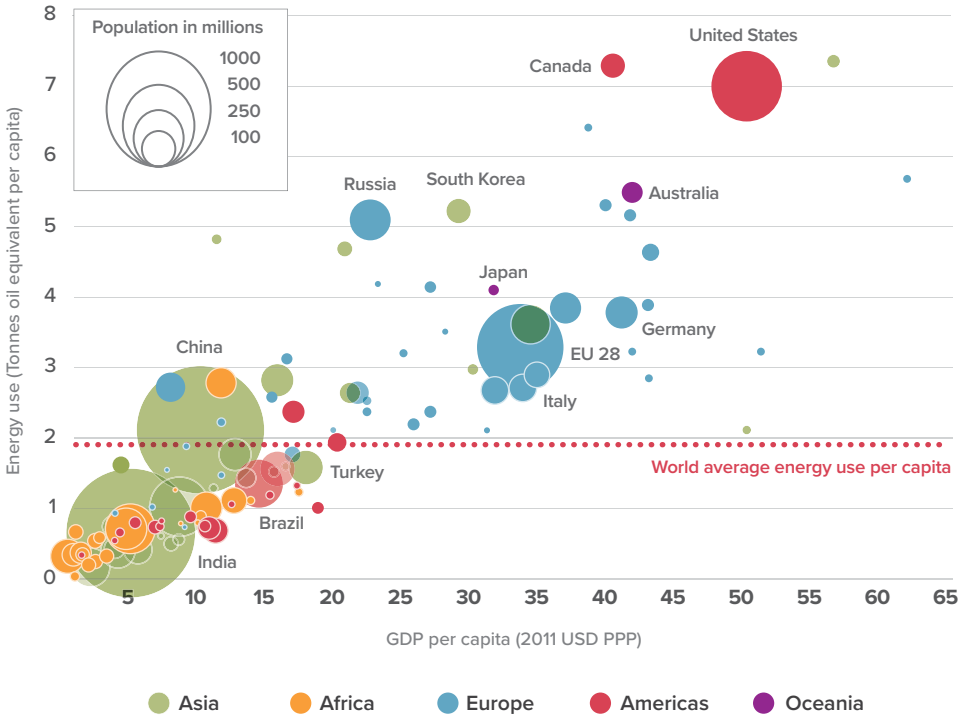
All high-income countries are high energy consumers, and all poor countries are low energy consumers (see Figure 7).

Multiple academic papers document the link between energy consumption and economic growth. However, researchers differ on the direction of causality, with some seeing economic growth enabling higher energy consumption, others seeing the arrow pointing in the other way, and many others seeing economic growth and energy access going hand in hand (Csereklyei, Rubio Varas, and Stern 2016; Stern 2018; Stern and Kander 2012). The International Energy Agency reports that GDP growth and demand for electricity dovetail each other (see Figure 8) (IEA 2021a).

One way that energy affects economic growth is that a lack of reliable and affordable electricity reduces foreign investment. The cost of doing business in Africa soars when investors themselves need to provide power for their projects. In addition, the high cost and frequently disrupted electricity supply adds further layers of expenses to both domestic manufacturing (Tinker and Mills 2025, 7) and agriculture since power outages damage equipment and lengthen production times (Cust and Zeufack 2023, 149).

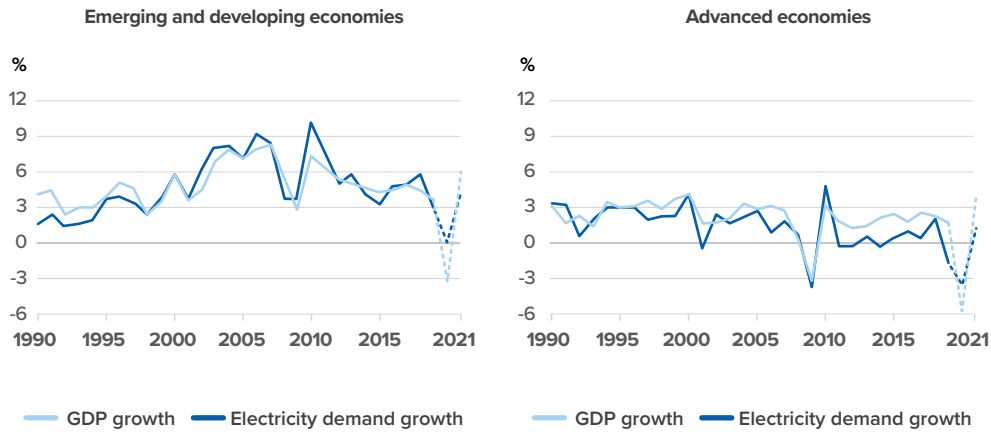
Lack of widespread access to natural gas means that most Africans need to import synthetic fertilizer, adding costs to food production. Energy price trends directly affect food price trends: natural gas is essential for synthetic fertilizer production, so when the gas price goes up or down, fertilizer prices are affected, and thus food prices. In addition, the cost of transportation between farmers and consumers, which is affected by fuel costs, is a main input into food costs.

FIGURE 7: Correlation between energy use and wealth



Source: National Center for Energy Analytics/World Bank Data (Tinker and Mills 2025).

FIGURE 8: Electricity demand and real GDP growth in emerging and developing economies vs advanced economies, 1990–2021



Source: IEA Outlook 2021.

African energy use: public health and environment

Not only is modern energy necessary for people to rise from poverty, but continued use of traditional biomass energy damages the health of its users, leading to premature deaths, human suffering and added costs for health care and for the care of orphaned children.

While fossil fuels are usually portrayed as "dirty" (in contrast to "clean" energy), the traditional energy they replace is actually more polluting and unhealthy and hurts the environment and human health much more. For instance, biomass burning causes the premature deaths of around 800,000 Africans annually (IEA 2025).

Reliance on traditional renewable energy also hurts the environment: access to electricity and liquefied petroleum gas (LPG) for cooking reduces deforestation (IEA 2022, 21) as less wood and vegetation is necessary to fuel fires. Synthetic fertilizers produced from natural gas enable more efficient farming and thus less land use, thereby preserving more open spaces. According to the IEA, burning traditional biomass for cooking leads to 60 percent more greenhouse gas emissions than using LPG (IEA 2022, 123).

While fossil fuels are usually portrayed as "dirty," the traditional energy they replace is actually more polluting.

Lack of modern energy disproportionally affects girls and women who traditionally gather and cook with the biomass fuels and collect water. Access to reliable modern energy replaces many of the heavy, labor-intensive traditional duties of women and girls: water pumps replace their need to carry water; LPG or electricity replaces their need to gather sticks and other biomass for cooking and heating; electricity can power machines to do the laundry.

There is no energy leapfrogging

Many in the development industry as well as some Western politicians claims that Africa can "leapfrog" over the fossil fuel stage directly to modern renewables (World Bank Group and China Development Bank Undated; *The Economist* 2017; Sguazzin 2022; Cilliers 2025). This claim is not tenable. For several reasons there is no viable model or precedent for leapfrogging over fossil fuel use from traditional biomass to today's renewables.

First, today's renewables cannot provide reliable electricity without a baseload of stable energy from natural gas, coal, or nuclear. Baseload power provides stability to a grid to enable reliable power provision, despite the volatility of renewable energy supplies. Thus, fossil fuel supplies or nuclear energy are necessary to operate today's generation of renewable energy. Wale Shonibare, the African Development Bank's director for energy financial solutions, policy, and regulations, responded to criticism from climate activists this way: "When the sun is not shining what happens? So, you need baseload that will be there all the time" (Chime 2025). Shonibare added, "I cannot put more than 30 megawatts of renewables on the grid, otherwise it's going to destabilize the grid" (Chime 2025).

In addition, the main source of modern renewable energy not just in Africa but globally – hydropower –has limited scalability due to the limited amount of untapped water sources that can produce hydropower on a commercial scale.

The concept of leapfrogging to today's renewables – mostly wind, solar and hydropower – implies that these power sources will be dominant in the future. However, despite hydropower being commercial for over a hundred years, and solar and wind power commercial for over 70 years, there are no signs of their imminent widespread global adoption (Shaffer 2025). Today's renewables, without the underpinning of a baseload of fossil fuels or nuclear power, cannot support modern economies.

Global development organizations are fighting emissions instead of poverty

In recent years, the leading institutions tasked with fighting poverty have abandoned their defined mandates and given priority to lowering CO_2 emissions over poverty eradication. On its website, the World Bank describes its mission as "To create a world free of poverty — on a livable planet." However, in reality, the World Bank promotes policies that increase energy poverty and thus overall poverty among the world's poorest, especially in Africa.

As an illustration, the World Bank has committed to allocating 45 percent of its funds in 2025 to climate finance (World Bank Group 2024a) and announced its intention to increase climate finance over the next five years (World Bank Group 2024b). The World Bank is tasked with poverty eradication, not with climate change policy.

In their reports and policy recommendations, the World Bank, IMF, and UN agencies exclude energy policy options that could be helpful to alleviating poverty in Africa in order to avoid fossil fuel consumption. This is even though they acknowledge that substituting use of fossil fuels over biomass would reduce emissions and pollution (for instance, see IEA 2025, 71). Moreover, while acknowledging that natural gas has been the main source of electricity expansion in Africa over recent decades, the multilateral organizations don't support the development of Africa's gas resources. Their reports also omit policies that would boost the provision of the necessary elements of energy systems, such as baseload power in electricity supply (IEA 2022), in order to avoid admitting that Africa needs fossil fuels.

The World Bank also regularly lists climate change as a main factor affecting Africa's economy and development while not mentioning the continent's lack of energy (World Bank Group 2025a), which of course is a much more significant factor affecting its prosperity.

The development organizations also promote electricity policies that lead to more expensive electricity than that that could

be delivered from natural gas or coal. Renewables require more capital per unit of electricity delivered. So, limiting African energy options through finance policy to only renewable sources means that Africans can develop less energy capacity per unit of investment (Liberty Energy 2024, 45). As will be discussed below, renewable energy combined with a baseload of natural gas, coal, or nuclear, is more expensive than gas, coal, or nuclear running on its own without significant renewable energy.

In addition, these same organizations promote the establishment of unreliable renewable electricity, especially off-grid solar, which is not sufficient for Africans to lift themselves out of poverty.

Africa offered only renewable energy options

The main development organizations, including the World Bank, only offer Africa renewable energy options for improving energy access.

When discussing Africa's energy needs and how to meet them, the World Bank's flagship publication on Africa, *Africa Pulse,* only mentions renewable energy as a potential source of additional energy for Africa (World Bank Group 2023a). Its policy recommendations in the 2025 edition of *Africa Pulse* do not even mention increasing electricity access in Africa as a goal, despite that being essential to poverty reduction.

The International Energy Agency, like the World Bank, has abandoned its defined mandate of promoting energy security among its member states; it now gives precedence to policies that lower emissions. For instance, in its policy recommendations and studies on Africa, the IEA only offers low-carbon energy policy ideas, and not ones that could generate higher rates of electricity generation at a lower cost (IEA 2023).

The various UN agencies also almost exclusively suggest renewable energy policy options as the way to address energy poverty in Africa. For instance, the 2024 UN Conference on Trade and Development (UNCTAD) agency report states that the six "key actions to reduce Africa's vulnerabilities" include "invest in renewable energy to enhance energy security" (UNCTAD 2024). The report

does not mention the need for baseload fuel, nor fossil fuels for any sector. In its recommendations for addressing the sources of economic vulnerability in Africa, it states that Africa should "invest in renewable energy and build infrastructure for reliable energy access, to reduce exposure to global market fluctuations" (UNCTAD 2024). Here UNCTAD mimics the often-stated myth propagated by the climate industry that renewable energy prices, in contrast to fossil fuels, do not fluctuate.

The development and energy institutions acknowledge that production of electricity from natural gas has increased energy access in Africa: "Africa's electricity generation increased roughly 25 percent over the past decade, largely due to increased natural gas" (World Bank Group 2023a). The World Bank recognizes that "Gas may also play an important role in meeting the growing domestic energy needs of the African continent" (Cust and Zeufack 2023, 42). It also acknowledges that development of African natural gas reserves would expand energy access as well as generate revenue from export for African countries (World Bank Group 2023b, 7, 54). However, it still won't fund the development of Africa's gas reserves. Thus, the UN, the World Bank, and the IEA are advocating for policies that are hurting the world's poorest, and they know it.

The UN, the World Bank, and the IEA are advocating for policies that are hurting the world's poorest, and they know it.

Taking its cue from the World Bank, the African Development Bank (ADB) also promotes a policy of limiting energy access to renewable energy. The ADB launched a program in 2013 aiming to establish universal energy access in Africa by 2025 based on renewable energy (AfDG 2017). Obviously, this failed, yet the ADB continues to promote the very same policy. The World Bank and the ADB together sponsor *Mission 300,* an initiative that aims to connect 300 million Africans to electricity by 2030 (World Bank Group Undated). The project invests in grid expansion, but no generation of electricity from fossil fuels. Extreme anti-fossil-fuel organizations are satisfied

with the ADB's work, claiming that in the last decade the bank has made most of its energy investments in Africa in renewable energy (Banking on Renewables 2025).

International organizations are aware that the countries in Africa with the highest percentage of renewable energy in their fuel mix have the lowest electricity access (United Nations 2025). This should be a wake-up call for those who want to reduce Africa's energy poverty. However, to the contrary, they frame this as something positive because it presents the opportunity to scale up renewable use. The UN Sustainable Development Group states: "In fact, many of the African countries with least access to electricity have the highest share of renewable energy in their final energy consumption. This presents a potent opportunity for the rollout of renewable energy on the continent" (United Nations 2025).

Multilateral organizations promote more expensive energy in Africa

In their preference for cutting emissions over poverty reduction, the World Bank recommends electricity mixes to Africa that are more expensive than those in most high-income countries. Electricity fuel mixes with a high proportion of renewables are a more expensive way to deliver power and are more expensive to operate than those with a small percentage of renewables or those that do not use renewables at all (Tinker and Mills 2025, 10). The combination of renewables plus batteries or with baseload gas or coal is more expensive and less reliable than straight-out natural gas- or coal-produced electricity in most locations (Lomborg 2025). In addition, adding renewables to a grid raises costs to electricity production that must be spent on managing and stabilizing the grid – and they add instability to the grid.

The European Union's "Draghi report" on the EU's economy acknowledges that Europe's high cost of electricity is a major factor challenging Europe's industrial sector (Draghi 2024). Yet the EU and its member states still promote expensive electricity for Africans.

To make renewable energy seem financially attractive, the World Bank, the IMF, and the International Energy Agency report

misleading information about the costs of renewable- versus fossil fuel-produced electricity. These agencies compare *electricity generation* costs and do not report the *levelized costs* of providing electricity. The levelized cost of electricity includes the total of all expenses involved in delivering electricity (Lazard 2023). The various development organizations focus on the price trends of solar panels, for instance, instead of computing the costs of the whole electricity system. Reliable power requires many functions beyond generation including laying and maintaining high-voltage electricity cables, the provision of baseload power to ensure stability and activity to balance the grid and managing the challenges to the grid of volatile renewable generation.

The International Energy Agency is aware that an energy system built on renewables is more expensive than one built on fossil fuels. In *IEA Africa 2022*, the IEA writes that "The clean energy transition in Africa depicted in the SAS (the Sustainable Africa Scenario) requires not just a shift in investment flows away from fossil fuels, but also a near doubling of total capital over 2026–30 compared with 2016–20" (IEA 2022, 156). Clearly advocating for more expensive energy is not compatible with poverty reduction and increasing energy access in Africa.

In another blatant example of its choosing to reduce carbon emissions over poverty, the World Bank promotes imposing carbon taxes in Africa on imported fossil fuels. If implemented, these taxes would lead to higher prices for electricity and transportation, which would further increase energy poverty on the continent. It is difficult to understand how raising energy costs in Africa is part of the World Bank's poverty reduction mandate (Onyango 2025).

The IEA also promotes policies that would lead to more expensive fertilizer production and thus more expensive food prices in Africa. The organization encourages Africans to use renewable power to produce ammonia for fertilizer instead of natural gas (IEA 2022, 18), despite it clearly being a more expensive and land-intensive way to produce fertilizer.

Unreliable power cannot support modern economic growth

Apart from the fact that they promote the use of unreliable power that cannot support modern economic growth, the World Bank and most of the multilateral organizations also ignore the need for baseload power in Africa. Modern stable electricity provision depends on the existence of a steady baseload power source, often provided by coal, natural gas, or nuclear. In electricity systems that have a significant proportion of their power generated by renewables, natural gas is the most appropriate source of baseload power, since its generation can be relatively quickly adjusted to even out the volatility of the renewable power sources.

With the current technologies there is no stable electricity without baseload power. However, the World Bank reports ignore any discussion of baseload power in their policy recommendations. This is obviously a purposeful omission because clearly the World Bank energy experts know that baseload power is necessary to deliver stable electricity. But discussing this fact would force them to admit that fossil fuels are still necessary for Africa to expand its electricity access.

Electricity disruptions often damage electricity-using machines, such as water pumps, refrigerators, and cancer treatment machines (Ige et al. 2021). When the electricity supply is volatile and such disruptions occur, it creates new debt for the owners of the machines.

As energy experts Scott Tinker and Mark Mills have pointed out, renewable energy is more vulnerable to disruptions from weather than fossil fuel or nuclear-generated power, which contributes to its lower reliability: "Utility scale wind and solar require vast areas of land, which make them more vulnerable to storms and disasters" (Tinker and Mills 2025, 7).

Mine and export versus producing oil and natural gas

Almost all World Bank, IEA and UN publications in recent years encourage Africans to abandon fossil fuel production since, according to these organizations, fossil fuels will not be necessary in the future due to the imminent "energy transition to renewable energy." These

organizations instead recommend that Africans devote more resources to mining the minerals that the renewable energy sector consumes: "African policy makers need to seize the opportunities that are available to them during the low-carbon transition. The transition toward the low-carbon economy is irreversible and will be intensive in minerals that are abundant in many countries in the region." Not only do these organizations say that Africans should switch from oil and gas extraction to mineral mining, but the World Bank claims that "the transition toward the low-carbon economy is irreversible" (World Bank 2023b).

The first key finding in the World Bank's *Africa's Resource Future* declares that "Estimates suggest that 80 percent of proven fossil fuel reserves must remain under the ground to meet Paris Agreement targets (Bos and Gupta 2019). However, the transition from fossil fuels to clean energy is likely to create demand for 3 billion tons of minerals and metals needed to deploy solar, wind, and geothermal energy by 2050. Lithium, cobalt, and vanadium are critical for energy storage, and copper, indium, selenium, and neodymium are essential for manufacturing wind and solar power generators" (Cust and Zeufack 2023, 52). The study declares as if it is a fact "that the demand for fossil fuels is expected to significantly decline over the coming decades" (Cust and Zeufack 2023, xxxviii). The World Bank report also declares: "Unlike fossil fuel resources, the demand for Africa's minerals and metals is likely to be much more robust in future decades and may even expand rapidly" (Cust and Zeufack 2023, 43). This assertion comes despite the fact that global demand for fossil fuels is not declining but actually increasing.[1]

Renewable energy is more vulnerable to disruptions from weather than fossil fuel or nuclear-generated power, which contributes to its lower reliability.

IEA Executive Director Fatih Birol in the introduction to the *IEA Africa 2022* report wrote: "decision makers should bear in mind longer term trends of declining demand for fossil fuels as the transition to clean energy advances. The analysis pinpoints how African countries can position themselves today to hedge against new risks and to seize emerging opportunities in areas such as critical minerals and green hydrogen" (IEA 2022, 4).

Of course, mining causes significant environmental damage. However, the World Bank and the IEA have deemed mining "green" since it serves their renewable energy agenda. In addition, mining requires reliable around-the-clock electricity. How will that electricity become available in Africa without fossil fuels? Moreover, if Africans want to derive more value from the mined minerals and process them before export, that processing will require reliable electricity. In fact, it will require not only reliable electricity but cheap electricity so Africa can compete in price with other countries that are processing or plan to process critical minerals, such as China, Russia, the United States, and Canada, where electricity is much cheaper.

Multilaterals support unrealistic policies for Africa: green hydrogen

The multilateral development organizations, the IEA, and high-income donors are promoting the establishment of uneconomical technologies in Africa, most notably the establishment of a green hydrogen industry. Despite more than US$120 billion of committed subsides in the EU and the United States under the Biden administration, few companies have succeeded in establishing markets for green hydrogen. Mainstream energy research deems green hydrogen subsidies as ineffective and wasteful (Technical University of Munich 2025). However, that has not stopped the World Bank, the UN, and the European Investment Bank from promoting green hydrogen production in Africa (CVA Undated; United Nations Undated).

Green hydrogen has very low energy efficiency since it loses energy in the process of producing electricity, then in using that electricity to produce hydrogen, and finally in transporting that hydrogen for use. Foreign entities are recklessly promoting this low-energy product for Africa, despite the continent's desperate need for energy.

The IEA falsely creates the impression that Africa is lagging behind a growing global demand for green hydrogen: "The use of low-carbon hydrogen in Africa today is minimal, but, as in other parts of the world, that energy carrier is expected to play a major role in the continent's clean energy transition, including by displacing fossil

fuel use in several industries such as fertilizer production" (IEA 2022, 100). However, green hydrogen, despite massive subsidies in the West, has not succeeded to establish significant market interest.

Multilateral organizations peddle energy and climate myths to Africa

The multilateral development organizations mentioned above disseminate incorrect information, especially on climate change and the prospects of a global energy transition to renewable energy. This touted information contradicts the mainstream research conducted by the United Nation's Framework for Climate Change (UNFCC) Intergovernmental Panel on Climate Change (IPCC). While there are many reasons to not take the IPCC climate assessments at face value (Shaffer 2024), surely the practice of the World Bank, IEA, and even other UN agencies to state more extreme assessments than the IPCC on climate is without any scientific basis.

The World Bank reports routinely promote the myth that African's oil and gas producers need to prepare for a global drop in demand for oil and gas as part of the impending energy transition. And the IEA, in its *Africa 2022* report, claims that "oil production in sub-Saharan Africa is projected to contract by one-quarter between 2021 and 2030 as shrinking global oil demand weakens the investment climate for new field developments" (IEA 2022, 97). However, there are no signs of reduced global demand for oil. In fact, 2023 and 2024 have been record-breaking years in demand for fossil fuels (including coal) and there are no signs of demand dropping in the near future for fossil fuels or an imminent energy transition (Energy Institute 2025).

In its 2023 *Africa Pulse* report, the World Bank erroneously states that the main countries at economic risk in Africa are fossil fuel exporters: "The demand for fossil fuels is expected to significantly decline over the coming decades. Depending on the pace of technological and policy changes, this decline could put permanent downward pressure on fossil fuel prices and threaten African countries' ability to benefit from their carbon-based resource wealth" (World Bank Group 2023d).

The World Bank, IEA, and UN agencies routinely state that renewable energy is a cheaper option for Africa than conventional energy systems. In their reports they point to the decrease in the price of solar panels (although they don't mention the increase in the price of wind towers). But, as pointed out earlier, the costs of electricity generation are only one component in the full cost of delivering electricity, which also requires outlays for baseload, backup, and maintaining a grid. In most cases, renewables combined with backup and baseload are more expensive than baseload-source electricity on its own.

The World Bank – and the UN – contradict the UN

World Bank reports also routinely make statements about the impact of climate change on Africa that contradict the UNFCC IPCC reports. For instance, the bank's 2025 *Africa Pulse* report states that due to climate change "In recent years, Sub-Saharan Africa has been buffeted by rising temperatures, irregular rainfall patterns, and multiple extreme weather events. In large parts of Central and West Africa, unprecedented rainfall from July to September 2024 led to devastating floods in Chad, Cameroon, Niger, and Nigeria."

Even UN agencies disseminate reports that contradict the claims of the UN's main climate research agency, the UNFCC's IPCC. UNICEF, for instance, claims that "The increasing frequency and severity of extreme weather events, rising temperatures and other climate impacts threaten the ability to effectively deliver the social services children need" (UNICEF 2023, 6).

The IPCC, in contrast, reports that climate change has not increased extreme weather, especially flooding, though it could happen after 2050 (Ranasinghe, Ruane, Vautard, et al. 2021, 1777). The 2021 IPCC report states with low confidence that humans have an influence on floods, drought, and storms (Ranasinghe, Ruane, Vautard, et al. 2021, 1777; Pielke 2023). For instance, the last IPCC report stated, "Several climatic impact-drivers are reliant on many factors beyond their associated primary climatic phenomenon. For example, river flooding is heavily dependent on river management and engineering" (Ranasinghe, Ruane, Vautard, et al. 2021, 1777).

Anti-poverty philanthropy organizations peddle misinformation, too

International organizations whose mission is to fight poverty also promote climate goals over poverty reduction. For instance, Save the Children supports the rapid phasing out of fossil fuels (Save the Children 2023a). Save the Children based its support for ending fossil fuels on the claim that extreme weather causes a growing number of deaths among children by reducing food supplies (Save the Children 2023b). As pointed out above, this claim contradicts the UNFCC IPCC's reports that contend that while in the future climate change may cause increases in extreme weather, today there is no increase in extreme weather (with the possible exception of days of heat waves). Moreover, countries that are high fossil fuel consumers are more adept at preventing deaths and property damage from extreme weather. And global crop yields have continued to grow over recent years, not decline.

Oxfam, which was founded to fight poverty, also campaigns to prevent financing for fossil fuels (Oxfam 2024). At the tail end of the Biden administration, Oxfam called for Biden to enact legislation that would preserve the prohibition on funding for fossil fuel projects: "Government agencies like the Export-Import Bank of the United States (EXIM) should have no part in supporting fossil fuel production or dependent sectors like oil, gas, and aviation. Shifting public funds from fossil fuels to clean energy is essential to our survival. The Biden administration should push remaining countries that have not yet committed to ending export finance for fossil fuels to agree to this historic deal" (Oxfam 2024).

As do international foundations

Many international foundations promote the adoption of renewable energy in Africa over fossil fuel-based electricity generation. They especially favor solar energy, much of it off-grid, without baseload backup. For example, the Rockefeller Foundation's power and climate program encourages the establishment of solar energy mini-grids in Africa (Bearak 2025). If adopted, this policy will give Africa unreliable electricity that cannot sustain significant economic growth.

Promoting renewable energy postpones reliable energy in Africa

Several of the policies that the World Bank, IEA, and other multilateral organizations are promoting for Africa prevent or hinder the continent's access to the reliable electricity it needs to support a modern economy. These policies include the promotion of off-grid and mini-grid electricity provision, promotion of renewable energy production that doesn't oblige the provider to pay to support a base grid, and promotion of renewable energy without baseload power.

This latter policy will not create enough demand for natural gas to enable African countries to develop gas resources for their domestic markets. When there is an insufficient domestic market for its energy resources, Africa often finds itself developing its energy wealth for export instead of domestic use. Gas producers generally prefer to supply gas to domestic markets near the location of the gas resources rather than export the gas. But there must be a viable domestic market to do so.

Lack of a reliable energy grid creates a vicious circle; it pushes modern electricity further out of reach. Where grid power is unreliable, industry and high-income consumers turn to private generators for their power and thus don't pay into Africa's grid. This private generation also removes most of the potential local customers for natural gas, creating a barrier to the development of Africa's gas riches for local customers.

Many African utilities, grid companies, and oil and gas producers find it difficult to secure funding for projects and expansion because of an insufficient number of domestic paying customers. The policies of the World Bank and other foreign organizations exacerbate this problem by diverting potential grid customers to off-grid and mini-grid electricity sources.

In addition, these policies prevent sufficient development of demand for natural gas to justify sales to the domestic market (which may require outlays for infrastructure such as pipelines from offshore gas fields), thus making it more likely that Africa's gas resources will be exported and not developed for domestic use.

Forty percent of global gas discoveries in the 2010s took place in Africa (Saadi 2021). However, relatively few of these fields were developed compared with the global average: "Overall, 56 percent of the discovered hydrocarbon fields in Sub-Saharan Africa had not yet been exploited as of 2018, whereas only 33 percent of the discovered hydrocarbon fields for the rest of the world have not yet been exploited" (Cust and Zeufack 2023, 77).

As part of the policies of the IEA, World Bank, and others to promote renewable energy, solar and wind producers generally are not obligated to pay into the maintenance and expansion of grids, unlike those who generate electricity from fossil fuels. This is even though renewable energy generation adds costs to the grid, including for stabilization.

In January 2025, the World Bank and the African Development Bank pledged US$55 billion to expand power in Africa (World Bank Group 2025b). However, half of the planned power is from solar energy. If these plans are implemented, many African grids will not be able to significantly expand their paying customers and thus will remain unreliable.

What happened to international finance for energy in Africa?

The first decade of the twenty-first century was Africa's modern epoch: it enjoyed significant economic growth supported by expanding energy access. In the 2010s Africa was home to more than 40 percent of the decade's natural gas discovery volumes. By the early 2020s, in contrast, Africa experienced low economic growth and backpedaling in energy access.

While multiple factors led to the slowdown in growth in Africa and energy advancement, a major factor was the end of public

financing for fossil fuel production and electricity production and a significant reduction in private capital allocated for fossil fuel projects (IEA 2022, 40).

The signing of the 2015 Paris Agreement was a key factor in the on-going process that has seen capital and finance for fossil fuel production and electricity projects dry up. While the agreement was non-binding, it nonetheless served as a benchmark and all multilateral organizations, banks, and countries were expected to fall in line with it. Major world leaders championed the Paris Agreement, especially US President Barak Obama. The agreement gave license to the anti-fossil fuel camp, which had had been active for decades – long before discussions began in earnest on climate change – to launch actions against fossil fuel funding. These actions were particularly damaging for Africa, which was more dependent on public financing and foreign investment than high-income regions.

In 2017, the World Bank announced that it would stop all financing for oil and natural gas production by 2019 (World Bank Group 2017). It had already halted funding for most coal projects in 2013. The World Bank's cessation of funding for gas and oil in 2019 particularly hurt Africa, since it had just had a string of new oil and gas discoveries. Surprisingly, this took place during President Donald Trump's first administration.

The war on natural gas starting in 2018–19

Toward the end of the 2010s, when the multilateral banks and agencies and many private capital sources stopped financing fossil fuel development and electricity produced from fossil fuels, the halt included financing natural gas, which had previously been considered useful in lowering carbon emissions and pollution. This was particularly damaging for Africa, which had just recently discovered multiple new volumes of natural gas.

For decades, switching from coal to natural gas in power production was considered the fastest and cheapest way to lower air pollution and carbon emissions (IEA 2019; Stoppard 2024). However, since the late 2010s, the main forces promoting a transition

to renewables have advocated eliminating all fossil fuels, including natural gas.

A huge policy shift began to take place. By 2018 the same organizations and countries that had advocated using natural gas came to see it as a major climate threat and wanted to eliminate its use. Climate policy organizations joined in, promoting the claim that methane (the main element in natural gas) caused more climate warming than carbon dioxide.

This sudden shift in policy away from natural gas is puzzling. No new research was published that indicated the need for a different approach to methane. If the climate organizations sought to reduce methane emissions, why start with natural gas that is only responsible for 4 percent of global methane emissions (Belletti et al. 2023)? Moreover, there is no viable alternative to natural gas in power production, except coal, and no replacement for natural gas in modern fertilizer production. Thus, a significant reduction in natural gas consumption would lead to global power outages and economic ruin as well as fertilizer shortages, causing global food prices to soar.

Given the relatively low impact of emissions from natural gas, it is highly unlikely that this decision was motivated by climate concerns. China launched a wider war on natural gas in the same period. In 2009, the US became the world's largest natural gas producer, and in 2017, the US shifted from being a net natural gas importer to a net exporter. Due to its domestic gas production, the US now had access to cheap electricity, giving it an economic edge that would challenge China's manufacturing dominance.

The campaign to reduce methane focused on natural gas, which is the main source of US electricity generation (EIA 2024), while ignoring methane emissions from non-livestock agricultural activity, such as rice cultivation. Chinese rice cultivation generates more methane emissions (IPCC 1997) than US natural gas production and use, but no world body asked Beijing to cut these emissions. Attention to methane emissions from agricultural activities would have put China in the crosshairs.

In parallel, the IEA, UN, and major environmental organizations soured on natural gas and began to promote blocking its usage along

with funding for natural gas projects. While there is no clear proof, it is suspicious that the timing of the climate lobby's shift on natural gas came just as China recognized that it cannot frack at home: China's geology was not conductive to fracking and water shortages limited fracking capacity.

The EU stops funding fossil fuel projects

In 2019, in line with EU policy decisions, the EU's public finance arm, the European Investment Bank (EIB), announced that by 2021 it would stop financing fossil fuel projects. This even included projects that could supply natural gas to the EU. Through this policy Brussels hurt his own energy security since without public finance, many project owners decided not to develop gas exports for Europe. The European Bank for Reconstruction and Development (EBRD) decided in late 2021 to support "full Paris alignment" of its investments by 2023, which included stopping all financing of oil and natural gas production. In parallel, most EU member states during the same period also halted financing for fossil fuel production abroad. The EU published its green EU Taxonomy, a legislative guide to investments that are aligned with the Paris Agreement (European Commission Undated).[2]

U.S. Biden administration accelerates cuts to fossil fuel funding abroad

The Biden administration significantly accelerated the end of support from high-income countries for fossil fuel projects, including those that could have increased access to energy in Africa. Days after his inauguration in January 2021, President Biden signed an executive order requiring the secretary of the treasury to develop a strategy to ensure that international financial institutions promoted finance that aligned with the Paris Agreement, and for the US to establish "a plan to end international financing of carbon-intensive fossil fuel-based energy" (White House 2021). Consequently, the US Treasury announced guidance to the multilateral development banks advocating

for the end of funding for fossil fuel projects (US Department of the Treasury 2021a).

Furthermore, in October 2021 the Biden administration ordered in all US government agencies and embassies to refrain not only from funding fossil fuels but from engaging in policy discussions related to fossil fuels (US Department of the Treasury 2021b; author's interviews).

In addition, in November of that year during the COP26 UN climate change conference in Glasgow, 20 countries, including the United States and Canada, pledged to stop funding oil and gas projects in developing countries. They made this pledge even though fossil fuels are the primary energy source for their own countries. Five development banks also signed the pledge, including the European Investment Bank and the East African Development Bank (Abnett and Jessop 2021). The African Development Bank was not a party to this pledge.

In 2021, the World Bank ceased financing projects that generated electricity from fossil fuels including, with very few exceptions, natural gas (World Bank Group 2021). The G7 also stopped financing all fossil fuel production and projects that same year.

In parallel, the International Energy Agency provided the research justification and thus legitimacy for ending finance and investment in fossil fuels globally. In May 2021, the IEA published its *Net-Zero by 2050* report (IEA 2021b). During the launch of the report, IEA executive director Fatih Birol stated that "If governments are serious about the climate crisis, there can be no new investments in oil, gas and coal, from now – from this year" (Harvey 2021a).

After the return to the White House of President Trump in 2025 and his potential cutting of American funding to the IEA, Birol reversed his position and stated there is a need for investment in oil and gas (Gardner 2025). This after four years of the world denying funding to the world's poorest, chiefly in Africa.[3]

In tandem with the multilateral agencies, the private capital market also reduced funding for fossil fuel projects. From the early part of the 2000s, the ESG movement (environmental, social, and governance) gained momentum and influence over investors. ESG

scores rewarded companies that refrained from investing in fossil fuel projects. Following the adoption of the 2015 Paris Agreement, investors in the private sector greatly reduced their capital allocations for fossil fuel production and electricity produced from fossil fuels.

By 2021, the *Global Investor Statement to Governments on the Climate Crisis* succeeded to enlist 587 investors with more than $46 trillion in assets under management to sign up to end fossil fuel production (Investor Agenda 2021).

In addition, the Glasgow Financial Alliance for Net Zero (GFANZ) led by Mark Carney, now Prime Minister of Canada, and Michael Bloomberg succeeded in greatly reducing capital flows and allocation to fossil fuel energy despite market demand signals for additional production: GFANZ signed up 450 financial firms that held $130 trillion in assets to promote global "decarbonization" (GFANZ 2021). This coalition signed up companies to commit that "all business models should be aligned with net-zero." These coalitions did not distinguish between oil and coal and low-carbon and low-pollution natural gas. Thus Africa, which has major untapped natural gas resources, lost out on potential investments.

International climate policies are particularly disadvantageous for Africa and contribute to the continent's energy poverty.

Accordingly, investments in fossil fuels from the private capital market were greatly reduced, despite market signals that there was continuing demand.

Once investors signed up to reject fossil fuels, banks and insurance companies also joined and pledged to stop financing and insuring fossil fuel projects, including natural gas.

Shamelessly, when capital investors understood that significant additional electricity was necessary to support AI and data centers, and that renewables cannot deliver the needed electricity volumes and reliability, many left GFANZ and other organizations that had frozen funding for fossil fuel projects. They apparently had no problem imposing these policies when they only affected the world's poor but were less keen to do so when they affected high-income countries.

International climate policies hurt Africa particularly

International climate policies are particularly disadvantageous for Africa and contribute to the continent's energy poverty.

First, underinvestment in fossil fuels over the last decade as part of climate policies led to increases in prices of oil, coal. and natural gas. While these price increases triggered recession in Europe and high inflation in the United States and Canada, the higher prices pushed energy out of reach for many Africans. In 2022, Africa saw its first decrease in electricity access, which dropped again in 2023. In addition, higher global propane prices meant that many Africans, including those who had purchased clean cooking stoves, could not afford the fuel to power them and returned to consuming traditional biomass, even where propane was available.

Second, cuts in public financing for fossil fuels by the World Bank, the G7, and others had a particularly harsh impact on Africa. In contrast to high-income countries, Africa is dependent on public financing for energy development. In addition, due to the high debt-to-GDP ratio[4] of many African countries and energy companies in Africa, they pay more for capital in private markets than do high-income countries and companies. Thus, access to below-market capital through public lending institutions is particularly important for Africa.

In addition, at one time multilateral banks gave loan guarantees that helped private finance invest in Africa because the guarantees lowered investors' risk. However, with the shift in policy against fossil fuel finance, these loan guarantees were also cancelled.

Third, renewables require more capital per unit of electricity produced than does electricity generated from fossil fuels. So, by using finance policy to limit African energy options to only renewable sources means that Africans can develop less energy capacity per unit of investment. In the last 15 years, more than half of global energy investments have been dedicated to low-carbon energy projects. However, low-carbon energy has increased by only 14 exajoules since

2010. In contrast, fossil fuel energy production rose 51 exajoules in the same period (Liberty Energy 2024, 45).

The International Energy Agency routinely celebrates that more investments are going to "clean energy" than to fossil fuels and claims that this is a sign that the energy transition is imminent (IEA 2024b). However, this investment trend means that less energy is being produced. The IEA's mandate is to ensure the energy security of its member states, yet in reality advocates for producing less energy per investment unit.

The United Nation's Framework for Climate Change (UNFCC) structure is also disadvantageous to low-income countries, most of which are in Africa. The UNFCC agreements require each country to lower their emissions by a pledged percentage, versus lowering them to some absolute number. This system is inherently disadvantageous to low-income countries, especially those with little manufacturing capacity. These states don't have many emissions to cut from, so all they can do to cut meaningful percentages is to curtail economic activity, energy consumption, or farming.

Global climate policies increase Africa's foreign dependence

Global climate policies promoted by the UN, the World Bank, the IEA, and others are deepening Africa's dependence on handouts from high-income countries instead of African nations using their local energy resources to develop their own domestic economies. Africa is rich in oil and gas, which can be developed to fuel domestic economic development. In contrast, the materials needed to capture energy from solar and wind will likely have to be imported from China, which produces most of that hardware – something that will also deepen Africa's links and trade with China instead of with the West.

The World Bank is encouraging African countries to access carbon offsets and UN climate funds by declining to develop their own energy resources. But doing so will lead Africa to increasingly depend on these foreign funding schemes instead of developing its home-grown industries.

The IEA wants Africa to sell carbon credits to Western countries in order to fund the switch from burning wood and dung to LPG and electricity (IEA 2025, 13). However, it is highly unlikely that Africa can generate enough revenue from carbon credits to finance the move from dung and wood, which is mostly free to collect, to payment for stoves, LPG, and electricity.

Geopolitical implications

The policies of the US, Canada, the EU, and G7 multilateral institutions and private finance to halt loans and finance for fossil fuels have not only increased energy poverty in Africa but spawned important geopolitical developments: increased Chinese influence in Africa, the likely fomentation of anti-Western sentiments, and political instability. These changes are creating security challenges for the West and an opportunity for the West's adversaries to exploit the situation.

The West's policy to cut financing for fossil fuel production and electricity generation is creating an opportunity for China to increase its influence in Africa. Chinese influence has already grown on the continent over the last decade through its Belt and Road Initiative through which China funds major infrastructure projects. With the West having bowed out of fossil fuel energy finance, China's influence is becoming even greater as it becomes highly involved in the energy sector. Its participation in the sector through oil, gas and coal production, building and operating power plants, building and operating gas and electricity grids, and operating oil and coal ports is giving China an enormous opportunity for expanded political influence in Africa.[5]

Apart from having the effect of expanding China's influence, the Western-led policies that are increasing Africa's energy poverty

are likely to foment resentment of the West in Africa. Not only is the West indifferent to Africa's growing poverty but, as this report points out, its international energy policies are in fact exacerbating poverty on the continent. The West is promoting a policy whereby Africans are expected to accept partial energy access even as most of the world enjoys reliable energy. The West's adversaries, like China, can encourage and exploit this potentially emerging anti-West sentiment.

Further, continued energy poverty could lead to further political instability among the African states themselves. The lack of reliable power in other jurisdictions in the developing world has contributed to political instability. Frequent blackouts often precipitate regime collapse, as was seen in Egypt in the 2010s and in Bangladesh in 2024.[6] The Syrian civil war broke out as Syria's oil production declined and the regime was lacking revenue (Shaffer 2017, 47–48). Such unrest could spread to multiple states in Africa were investments in energy resources on the continent to continue to decline. The destabilization of additional states in Africa could create security challenges for the United States and its allies.

Continued poverty and lack of energy in Africa will lead to weak states and social instability.

Africa's population is the fastest growing in the world. At its current growth rates, a fourth of the globe's population will be African by 2050 (Paice 2022). If the world doesn't move quickly and succeed in eradicating African poverty, not only will a large portion of the world's population suffer very harsh living conditions, but that failure will generate immense geopolitical challenges.

Continued poverty and lack of energy in Africa will lead to weak states and social instability. Western adversaries such as China, Russia, and Iran can exacerbate the social instability, gain a foothold in weak states and increase their geopolitical allies in Africa. This could mean that a growing number of African states will turn away from the West and join alliance systems led by China and Russia, strengthening the global power of those countries.

Recommendations

Despite the extensive advances in human knowledge, especially over the last century, sometimes really bad ideas receive widespread public support. One of them is the idea that as part of climate change policy access to funding for fossil fuels should be denied – even when there is no substitution for fossil fuels. These policies are particularly hurting Africans as that continent relies on public financing to develop electricity provision.

In addition, over the last decade Africa has made a string of natural gas discoveries which, due to the new and restrictive international energy policies of high-income countries in the West, may stay in the ground instead of giving Africans greater access to electricity and revenue. These policies do nothing to reverse climate change; instead, they lead to increased pollution and carbon emissions as many in Africa continue instead to burn biomass. These policies do provide politicians and climate activists in Western high-income countries with a feel-good moment, while doing nothing to prevent climate change and causing suffering in Africa.

Cruel and ineffective energy policies are being enabled by the World Bank and the International Energy Agency, which have abandoned their defined missions: the World Bank has emphasized climate policy over its stated mission of eradicating poverty and the International Energy Agency has elevated climate policy over its mandate of energy security. In these cases, and others, this mission slide needs to stop.

Concretely:

- The main donors to the leading multilateral organizations, including the United States and Canada, must demand that they return to their defined mandates – the World Bank to poverty eradication and the International Energy Agency to energy security.
- The US, Canada and other main donors should not allow the World Bank, the IEA, and other entities they fund to count

partial electricity access as full electricity access. If a village gets a solar energy unit it provides a few hours a day of power but does not power machinery and stable supplies for refrigeration and water pumps. This type of electricity access is very limited in its ability to spur economic growth. It is incorrect to count these people as having full access to electricity.

- Data on electricity access in US government, IEA, World Bank and UN reports should be categorized as reliable or not. Unreliable power should not be counted as full electricity access.
- Africans need reliable power if they are to pull themselves out of poverty. They should not be forced to settle for off-grid or mini-grid solar units that will not power refrigeration, water pumps, power-intensive tools and industry. The West discriminates against Africa by forcing it to accept less than full and reliable power.
- Promotion of off-grid solar units should be limited to remote rural areas that cannot be served by grid power.
- The development banks and multilateral agencies that are recommending policies that see Africa falling short in its quest for reliable energy should be held accountable. Africa's development agencies and political leaders should not cooperate with these policies that prevent access to reliable energy for Africans. Africans who parrot World Bank, IEA, and United Nations rhetoric are hurting their own countries. They should clearly articulate the continent's true needs.
- Further, the development banks and multilateral agencies should not be allowed to count burning of biomass as consumption of "renewable" energy. All statistics and reports should make a separation between traditional and modern renewable energy. While technically renewable, the use of biomass generates significant indoor pollution and thus health impairments, as well as emitting air pollution and carbon emissions.
- The US and Canada must demand that the bank renew funding for fossil fuel projects, especially natural gas. Africa and the

developing world need more fossil fuels, not less, if they are to eradicate poverty.

- Funders of the UN, the World Bank, and the IEA must demand that these organizations do not knowingly report inaccurate information and base their policy recommendations to Africa on these falsehoods. For instance, mainstream climate science as represented by the UN's IPCC does not claim that extreme weather has increased in recent decades. Nor is there any evidence that an energy transition from fossil fuels to renewable energy is imminent. However, these claims appear in the multilateral organization reports.
- The UN IPCC system requiring lowering of percentages of emissions, versus actual amounts, especially hurts low-income and low industrialized countries, chiefly those in sub-Saharan Africa, and does little to prevent climate change. Lowering the meager CO_2 emissions generated in sub-Saharan Africa will not affect global emission totals in any meaningful way but will hurt the economies of the world's poorest. Africa needs to increase its industrialization and energy use, not reduce it.
- The United States, Canada, and other main funders of the IEA should demand full transparency from these organizations regarding the funding sources of the research and policy programs and publications on Africa, especially funds that come from China and other Western adversaries.

It is time to flip the moral high ground. Those who aspire to net-zero are condemning Africa to extreme poverty. Those who promote African access to fossil fuels want Africans to have the chance to rise up and reduce the economic prosperity gap between their continent and the rest of the world. ★

About the author

Brenda Shaffer is an international energy and foreign policy specialist, focusing on international energy policies, natural gas trade and foreign policy, Caspian energy, Azerbaijan, Iranian energy sector, ethnic politics in Iran, energy security policies, European energy security, critical energy infrastructure protection policy, and Eastern Mediterranean energy. She is a faculty member at the US Naval Postgraduate School. Shaffer is also a senior fellow at the Atlantic Council's Global Energy Center in Washington, DC. She is the author of several books, including: *Operational Energy* (co-author with Daniel Nussbaum and Alan Howard, De Gruyter, 2024), *Iran is more than Persia: Ethnic Politics in Iran* (De Gruyter, 2022); *Energy Politics* (University of Pennsylvania Press, 2009); *Borders and Brethren: Iran and the Challenge of Azerbaijani Identity* (MIT Press, 2002), and *Partners in Need: The Strategic Relationship of Russia and Iran* (Washington Institute for Near East Policy, 2001). Shaffer also was the editor of *Beyond the Resource Curse* (University of Pennsylvania Press, 2012), and *Limits of Culture: Islam and Foreign Policy* (MIT Press, 2006).

Shaffer frequently provides research and expert counsel to international institutions, governments, energy companies, financial institutions, and regional security organizations. She has given testimony to several committees of the US Congress, including the Senate Foreign Relations Committee, and to the European Parliament. She frequently appears on major news outlets worldwide to provide insight on developments in global energy markets and trends. ★

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Endnotes

1 In its 2025 Statistical Review of World Energy, the Energy Institute reported that fossil fuels provided 87 percent of global total energy consumption. This is a dramatic increase from 81.5 percent in 2024 (Energy Institute 2025).

2 Following the 2022 energy crisis in Europe, the EU amended the taxonomy to allow investments in nuclear energy and limited investments in natural gas in cases where the gas project is expanding existing supply systems or replacing the consumption of coal or oil.

3 Despite Birol's March 2025 statement that investments in fossil fuels are necessary, the IEA's publications continue to promote only development of non-fossil fuel energy.

4 More than half of African states have a debt-to-GDP ratio above 60 percent (see UNCTAD 2024).

5 Aware that the absence of Western finance would create a big opportunity for China, for the first few years of COP meetings Japan did not join other states in signing its declarations calling for the end of financing for fossil fuel projects (Harvey 2021b).

6 For more on the connection between electricity disruptions and violent regime collapse, see Shaffer 2017, 47–48.

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