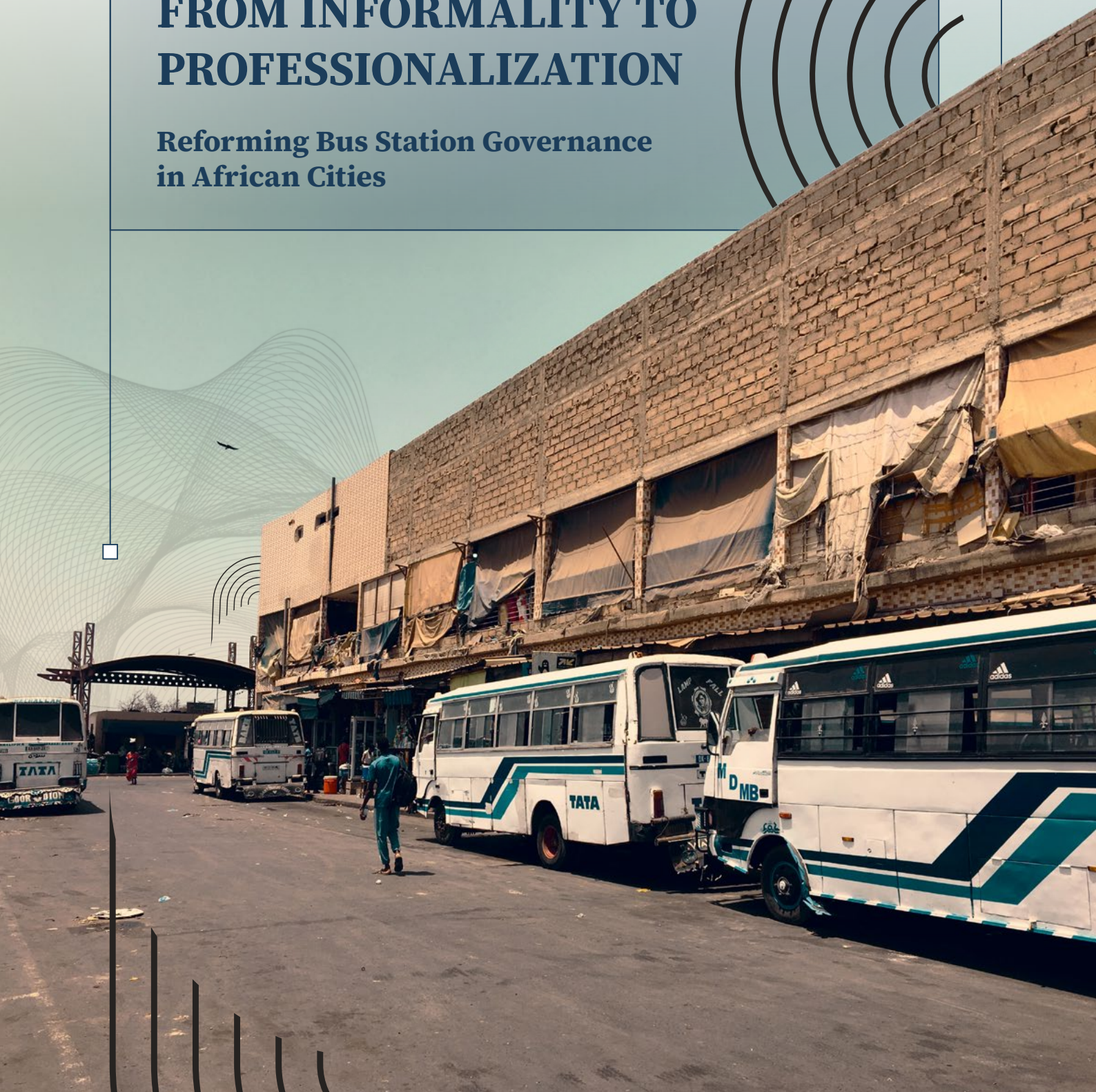


SSATP Working Paper

FROM INFORMALITY TO PROFESSIONALIZATION

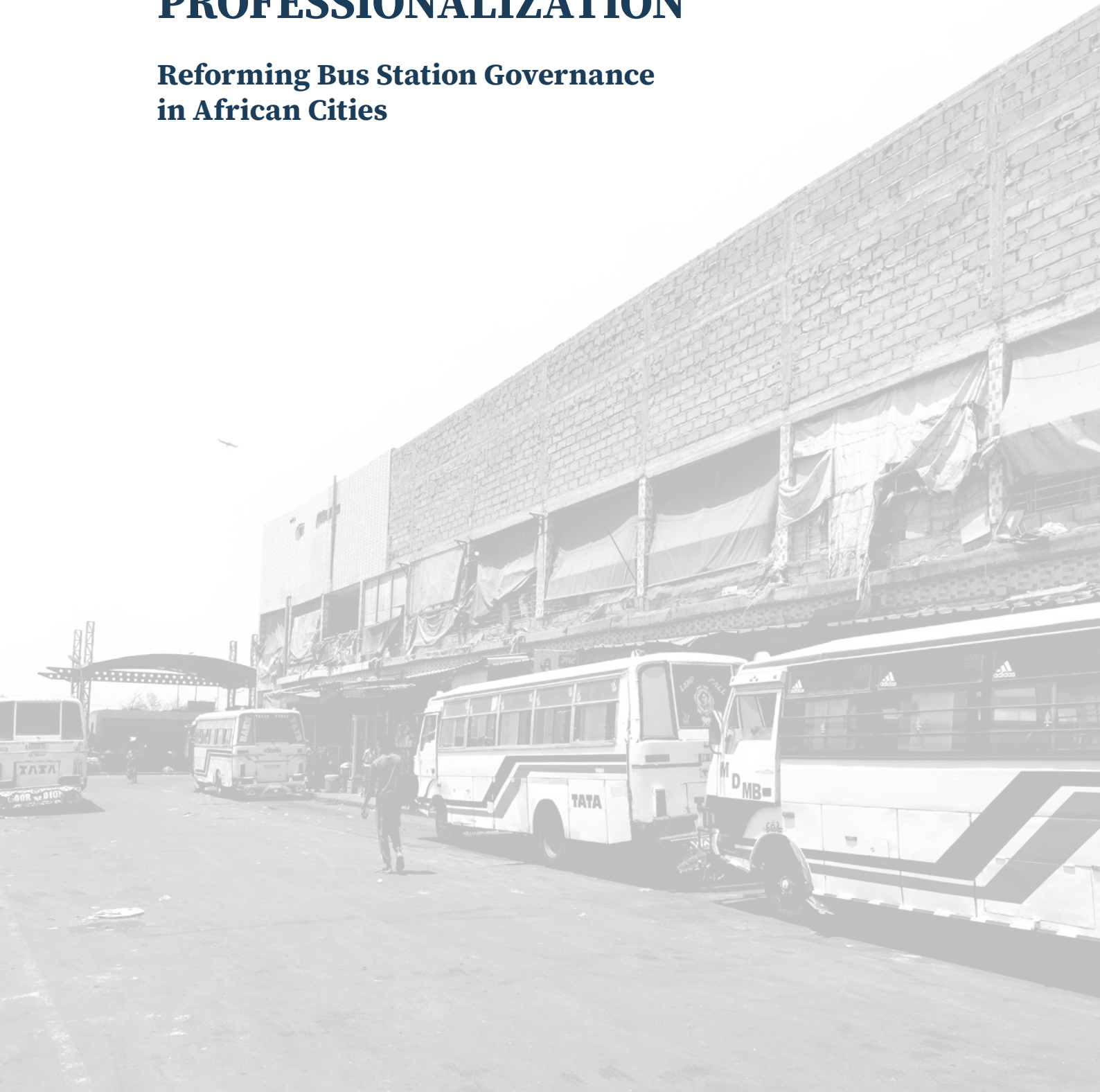
Reforming Bus Station Governance in African Cities



SSATP Working Paper

FROM INFORMALITY TO PROFESSIONALIZATION

**Reforming Bus Station Governance
in African Cities**



The Africa Transport Policy Program (SSATP) is an international partnership to facilitate policy development and related capacity building in the transport sector in Africa.

Sound policies lead to safe, reliable, and cost-effective transport, freeing people to lift themselves out of poverty and helping countries to compete internationally.

The SSATP is a partnership of:

44 African countries: Angola, Benin, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo, Democratic Republic of the Congo, Côte d'Ivoire, Djibouti, Eswatini, Ethiopia, Gabon, The Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, São Tomé and Príncipe, Senegal, Sierra Leone, Somalia, South Sudan, Tanzania, Togo, Tunisia, Uganda, Zambia, Zimbabwe;

8 Regional Economic Communities (RECs);

2 African institutions: African Union Commission (AUC) and United Nations Economic Commission for Africa (UNECA);

Financing partners for the Fourth Development Plan: European Commission (main donor), Swiss State Secretariat for Economic Affairs (SECO), African Development Bank (AfDB), and World Bank (host); Many public and private national and regional organizations.

The SSATP gratefully acknowledges the contributions and support of member countries and its partners.

More publications on the SSATP website: www.ssatp.org

The findings, interpretations, and conclusions expressed here are those of the author and do not necessarily reflect the views of the SSATP or its partners.

Please cite the work as follows: SSATP (2026). *From Informality to Professionalization: Reforming Bus Station Governance in African Cities*. Washington, DC: SSATP.

© 2026 The International Bank for Reconstruction and Development / The World Bank Group 1818 H Street, NW Washington D.C. 20433 USA.

SSATP is an international partnership supported by:

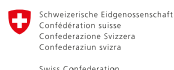


Table of Contents

Acknowledgement	9
Foreword	10
A Message From Our Partner	12
Executive Summary	15
1. Introduction	24
1.1 The Challenge of Station Management in African Cities	25
1.2 Bus Station Governance in the Paratransit Reform Agenda	28
1.3 About This Report	29
2. Stations in Context: Evidence from Four Cities	32
2.1 How Stations Come into Being	33
2.2 A Spectrum of Management Arrangements	35
2.3 Financial Flows and the Reinvestment Gap	38
3. Who Does What: Stakeholders, Roles, and Conflicting Interests	42
3.1 A Typology of Stakeholders	43
3.2 Key Management Roles	47
3.3 Competition and Service Quality	51
4. Management Models: From Informality to Professionalization	54
4.1 The Spectrum of Current Models	55
4.2 Alternative Institutional Arrangements	61
4.3 Conditions for Successful Transition	71
5. A Framework for Selecting a Management Model	76
5.1 Assessing Institutional Readiness	77
5.2 Step-by-Step Assessment Framework	80
6. Conclusion	94
Appendices. Presentation of the Eight Case Studies	99

List of Figures

Figure 1	Schematic representation of the three main management roles to be fulfilled	19
Figure 2	Governance and infrastructure status of the eight stations	36
Figure 3	Illustration of detailed financial flows at Zimpeto station	41
Figure 4	Main stakeholders' categories and their challenges	46
Figure 5	Schematic representation of the three management roles to be fulfilled	50
Figure 6	Rendering of the new Rabat interurban and regional public transport station	63
Figure 7	Photo of the Vitrolles Pierre Plantée Multimodal Station	65
Figure 8	Photo of the Koudougou bus station in Burkina Faso	67
Figure 9	Photo of the Avenida de America interchange station in Madrid	69
Figure 10	Three preconditions to reforming management models	72
Figure 11	Nine-step assessment framework	79
Figure 12	Relationship between paratransit professionalization and station management improvement	84
Figure 13	Decision tree for the selection of a management model	93
Figure 14	Daily vehicle flows entering and exiting Colobane station	101
Figure 15	Commercial activity characteristics at Colobane station	103
Figure 16	Daily vehicle flows entering and exiting Baux Maraîchers station	105
Figure 17	Commercial activity characteristics at Baux Maraîchers station	106
Figure 18	Daily vehicle flows entering and exiting Yaya Fofana station	109
Figure 19	Commercial activity characteristics at Yaya Fofana station	110
Figure 20	Daily vehicle flows entering and exiting Djéni Kobénan station	113
Figure 21	Commercial activity characteristics at Djéni Kobénan station	114
Figure 22	Daily vehicle flows entering and exiting Zimpeto station	117
Figure 23	Commercial activity characteristics at Zimpeto station	118
Figure 24	Daily vehicle flows entering and exiting Malhampsene station	121
Figure 25	Commercial activity characteristics at Malhampsene station	123
Figure 26	Daily vehicle flows entering and exiting Makumbusho station	125
Figure 27	Commercial activity characteristics at Makumbusho station	126
Figure 28	Daily vehicle flows entering and exiting Mbezi station	129
Figure 29	Commercial activity characteristics at Mbezi station	130

List of Tables

Table 1	Key characteristics of the eight case study stations	17
Table 2	Key characteristics of the eight case study stations	34
Table 3	Daily operator fee collection and distribution across case study stations	39
Table 4	Spectrum of current management models across case study stations	60
Table 5	Alternative institutional arrangements for bus station management	70

List of Boxes

Box 1	Definition of Key Terms	31
Box 2.	Rabat Bus Station, Morocco [Arrangement A: Consolidated Public Management]	63
Box 3.	Pierre Plantée Station, Vitrolles, France [Arrangement B. Management Contract]	65
Box 4.	Koudougou Bus Station, Burkina Faso [Arrangement C: Shared Investment]	67
Box 5.	Avenida de América Interchange Station, Madrid, Spain [Arrangement D: Full Private Financing]	69

List of Acronyms

AFTU	Association de Financement des Professionnels du Transport Urbain [<i>Association for the Financing of Midi-Bus Services in Dakar</i>]
AMUGA	Autorité de la Mobilité Urbaine dans le Grand Abidjan [<i>Greater Abidjan Urban Mobility Agency</i>]
AUMA	African Association of Urban Mobility Authorities
BOT	Build-Operate-Transfer
BRT	Bus Rapid Transit
CETUD	Conseil Exécutif des Transports Urbains Durables [<i>Executive Council of Sustainable Urban Transport of Senegal</i>]
DART	Dar es Salaam Rapid Transit Agency
FCFA	CFA franc (West African)
GIE	Groupement d'Intérêt Économique [<i>Economic Interest Group composed of transport operators</i>]
MT	Mozambican meticals
O&M	Operation and Maintenance
PPIAF	Public-Private Infrastructure Advisory Facility
PPP	Public-Private Partnership
RAGIM	Régie Autonome de Gestion des Infrastructures Marchandes [<i>Autonomous Market Infrastructure Management Agency, Burkina Faso</i>]
SNTL	Société Nationale des Transports et de la Logistique [<i>National Transport and Logistics Company, Morocco</i>]
SSATP	Africa Transport Policy Program
TANROADS	Tanzania National Roads Agency
TZS	Tanzanian shillings

Acknowledgement

The paper was prepared under the overall guidance of Mustapha Benmaamar and Cecilia Briceno-Garmendia (SSATP Program Managers) and Jean-François Marteau (World Bank Transport Practice Manager). The preparation of the paper was led by Simon Saddier (SSATP Sustainable Urban Mobility and Accessibility Pillar Lead) based on a technical report developed by Transitec Consulting Engineers and Nodalys (Julien Allaire, François Boulanger, Pablo Salazar-Ferro, Afaf Mkami, Nathan Delattre, and Simon Le Gall). The paper was edited by Gail Jennings and Seynabou Diop, designed by Anatol Ursu and published by Kaori Niina (Senior Partnership Specialist). The paper received valuable inputs from Bailo Diallo (PPIAF Infrastructure Specialist) and Fatima Arroyo Arroyo (Senior Urban Transport Specialist). Photos of the bus stations are credited to Transitec Consulting Engineers.

This paper was prepared with support from the Public-Private Infrastructure Advisory Facility (PPIAF).



FOREWORD

As President of the African Association of Urban Mobility Authorities (AUMA), I have the privilege of working with transport authorities across our continent who share a common conviction: that African cities deserve better public transport, and that the public institutions responsible for delivering it are stronger when they learn from one another. It is in that spirit that AUMA partnered with SSSATP and PPIAF in the development of this report—and it is in that spirit that I commend it to practitioners, policymakers, and researchers working on urban mobility across Africa.

Public transport in African cities is overwhelmingly paratransit. Despite decades of investment in formal systems, it is the minibuss, the shared taxi, and the midi-bus that carry the majority of urban passengers every day. Most of those passengers begin and end their journeys at bus stations. Despite being critical nodes in our transport networks, the organization of these stations is often overlooked, they are frequently congested, and poorly governed.

This report addresses that reality with the seriousness it deserves. Bus stations are the physical and institutional interface between public authorities and the transport sector: the place where regulation is enforced, where revenues are generated and contested, and where the quality of governance is most immediately felt by the people who depend on public transport. Yet across African cities, station governance has received far less analytical attention than it merits, and far less institutional investment than it requires.

The eight case studies at the heart of this report—drawn from Dakar, Abidjan, Maputo, and Dar es Salaam—embody the AUMA spirit. The authorities and operators who opened their stations, their records, and their experience to this research did so in the belief that collective learning produces better outcomes than isolated practice. I am grateful to all of them for their openness and generosity.

I hope this report will serve as a practical resource for transport authorities across the continent—a diagnostic tool, a source of comparative insight, and an invitation to raise our collective ambitions for what bus stations in African cities can and should be.

Eng. Mrs. Abimbola Akinajo

President, African Association of Urban Mobility Authorities [AUMA]
Managing Director, Lagos Metropolitan Transport Authority [LAMATA]



A MESSAGE FROM OUR PARTNER

PPIAF exists to help governments in developing countries create the conditions under which the private sector can play a productive, sustainable, and accountable role in infrastructure. Our support takes many forms: policy reform, regulatory design, institutional capacity building, and knowledge generation. What unites these activities is a shared conviction that better-governed infrastructure delivers better outcomes for governments, investors, and above all the people who depend on these services.

Bus stations may not be the first type of infrastructure that comes to mind when one thinks of private sector participation. Yet as this report demonstrates, the private sector is already deeply involved in the management and financing of bus stations across African cities, often informally and without a clear contractual framework, or in ways that serve private interests at the expense of public transport performance. The question is not whether the private sector should be involved in bus station governance. It already is. The question is whether that involvement is structured in a way that channels private capacity and resources toward public goals.

That is precisely what this report sets out to answer. By mapping the full spectrum of current management arrangements and identifying the conditions under which each type of private participation is appropriate, the report provides public authorities with the analytical tools to move from passive observation to active governance. PPIAF is pleased to have supported this work, developed in partnership with the Africa Transport Policy Program (SSATP), and we hope it will serve as a practical resource for transport authorities and private actors across Africa.

William Llewelyn Davies

Acting Program Manager, Public-Private Infrastructure Advisory Facility [PPIAF]





Executive Summary

Bus stations¹ are the primary interface between African cities and their public transport systems. They serve millions of passengers daily, anchor significant commercial activity, and support the livelihoods of transport operators, traders, and informal workers. Yet in most Sub-Saharan African cities, they are among the least well-governed pieces of urban infrastructure—congested, underfunded, poorly maintained, and managed by arrangements that have evolved without design and have never been seriously reformed.

This report argues that the underperformance of African bus stations is fundamentally a governance problem. The physical deficiencies visible at most stations—deteriorated surfaces, inadequate passenger facilities, unsafe road interfaces—are symptoms of institutional failure rather than causes in their own right. Addressing them requires not just capital investment but a restructuring of the roles, incentives, and accountabilities that determine how stations are managed. The central argument of this report is that public authorities must shift from passively collecting fees and tolerating informal management to actively defining clear institutional frameworks, assigning roles deliberately, and exercising meaningful oversight over the management of stations in their jurisdictions.

1. This paper uses the term "bus station" to refer to designated off-street facilities that serve as origin or destination points for multiple public transport routes, where vehicles load and depart in an organized or semi-organized manner. It focuses on stations for paratransit (informal) collective, road-based public transport vehicles—ranging from minibuses and midi-buses to larger coaches. The paper does not address on-street stops, depots used solely for overnight parking or maintenance, or services operated by individual motorcycles or three-wheelers (such as tuk-tuks or moto-taxis), except where these share facilities with collective vehicle operations. Key terms used in this paper are defined at the end of the Introduction chapter.

There is no universally optimal management model. The right arrangement depends on the institutional context, the station's revenue-generating capacity, the legal framework, and the public authority's capacity to oversee contracts. The report provides a practical framework for making that determination—a nine-step assessment tool that guides decision-makers through the conditions they need to evaluate before selecting a target arrangement and designing a transition pathway toward it.

This paper is a contribution to a wider agenda of informal public transport reform. The SSATP publication *Embracing Informal Transport* (2025)² identifies five levers through which cities can progressively reform paratransit systems: regulation, sector organization, vehicle financing, operations and maintenance, and supporting infrastructure and systems. Bus station governance sits within this fifth lever—yet it is arguably among the most operationally complex and most consistently overlooked of the five. Decisions about how stations are owned, managed, and financed shape the conditions under which all other reforms play out: a poorly governed station undermines regulatory enforcement, frustrates organized operators, and deters private investment. This paper addresses that gap directly, providing a diagnostic framework and a set of actionable institutional models for cities seeking to improve station performance as part of a broader reform process.

The report draws on fieldwork conducted at eight bus stations in four cities—Abidjan (Côte d'Ivoire), Dakar (Senegal), Dar es Salaam (Tanzania), and Maputo (Mozambique)—selected to represent a range of linguistic, institutional, and urban contexts across Sub-Saharan Africa. The eight stations span the full spectrum of management arrangements, from entirely informal operator-led management to formal private concession under public oversight, and their variety is one of the study's most valuable assets. This report draws on the case studies selectively to illustrate analytical points rather than document each station comprehensively.

Governance deficit and reinvestment gap

Most of the stations studied were not planned. They emerged in response to transport demand, on available public land near road junctions or commercial centers, and consolidated informally over time. The governance arrangements that subsequently developed reflect this informal genesis: no single entity holds clear responsibility for managing the station as an integrated system. Ownership, operational management, commercial management, and regulatory oversight are distributed across municipalities, transport authorities, operator associations, and informal actors—with limited coordination between them.

2. Arroyo-Arroyo, Fatima; Brendan Finn; Philip van Ryneveld. 2025. *Embracing Informal Transport: A New Paradigm for Urban Mobility. Transforming Challenges into Opportunities with Practical Tools and Strategies*. Washington, DC: SSATP.

TABLE 1**Key characteristics of the eight case study stations**

City	Station	Pax/day	Size	Vehicle types	Management
Dakar	Colobane	~49,400 [~1,560 vehicles]	1.91 ha	Midi-buses, minibuses, formal buses, taxis	Fragmented; no formal contract; jurisdiction disputed between two municipalities and CETUD
	Baux Maraichers	~10,100 [~1,350 vehicles]	10.5 ha	Interurban/ international coaches, minibuses	10-year private concession under CETUD oversight
Abidjan	Yaya Fofana	~19,700 [~1,315 vehicles]	0.5 ha	Shared taxis, 7-seaters, minibuses	Municipal ownership; private-built premises; ticketing system piloted
	Djéni Kobénan	~27,200 [~905 vehicles]	0.4 ha	Minibuses, shared taxis	Informal verbal arrangement with municipality; no formal infrastructure
Maputo	Zimpeto	~55,000 [~2,200 vehicles]	1.0 ha	Minibuses, large buses	Municipal company (EMME) + police + operator associations; fragmented fee collection
	Malhampsene	~46,300 [~1,850 vehicles]	2.81 ha	Minibuses, various buses	Entirely informal; operator- led; no public involvement; no infrastructure
Dar es Salaam	Makumbusho	~53,400 [~2,425 vehicles]	0.9 ha	Minibuses, motorcycles, tricycles	PPP (municipality + private partner); private focus on commercial revenues
	Mbezi	~34,500 [~1,400 vehicles]	2.3 ha	Minibuses, BRT buses, motorcycles, tricycles	Managed by TANROADS; dual yard (paved BRT level / unpaved local level)

Public authorities tend to act as passive landowners: they collect land-use fees or taxes but do not manage the station, invest in its infrastructure, or exercise meaningful regulatory oversight. In the most informal cases—such as Malhampsene in Maputo, which emerged without official sanction and has no formal relationship with the municipality—public authorities collect nothing and provide nothing in return. Where multiple public authorities are present—as at Colobane in Dakar, which straddles municipal boundaries and falls nominally under CETUD's oversight—responsibility diffuses to the point where no entity bears effective accountability.

In the absence of active public management, transport operator associations step into the governance vacuum and assume station management functions by default. Their primary obligation is to their members—ensuring that vehicles move and revenues are collected—not to station performance in any broader sense. Passenger experience, infrastructure maintenance, and long-term investment are systematically underweighted. The result is a recurring pattern: stations managed for operators rather than users, generating revenues that are captured by multiple actors and reinvested by none.

Stations generate substantial economic activity from two main sources: transport-related fees and commercial rents. Daily transport income collected by management bodies across the eight case study stations ranges from US\$37 at Malhampsene in Maputo to US\$7,902 at Baux Maraîchers in Dakar—a gap that reflects differences in traffic volume but above all the degree to which fee collection has been systematized and formalized. Despite this revenue generation, the institutional arrangements governing financial flows rarely allow for reinvestment in infrastructure. Revenues are divided among multiple collecting actors, absorbed into general budgets, or captured entirely by operator associations, with no mechanism for directing them toward maintenance or capital improvement. The physical deterioration of most stations is the direct consequence of this structural reinvestment gap.

Commuters at
an informal bus
stop in Maputo



The subordination of passengers

Passengers are the most important and least powerful stakeholder group at African bus stations. They are the primary source of revenue for the entire station ecosystem—fares paid to operators and purchases made from vendors are the origin of virtually all income flows—yet their needs are rarely articulated as management objectives. Stations are designed around vehicle movements, not passenger experience. In the absence of alternatives, passengers are captive users of paratransit; their patronage is taken for granted, and there is no governance mechanism that makes their experience a management priority.

This subordination has a gender dimension. The paratransit sector is overwhelmingly male—drivers, operators, association officials, and informal station managers are almost exclusively men. Women represent a large share of station users and vendors but their specific needs—adequate lighting, secure waiting areas, gender-separated sanitation—are systematically underweighted in management decisions. At Makumbusho in Dar es Salaam, non-functional lighting has made the station unsafe after dark, disproportionately affecting women. Yaya Fofana in Abidjan is the only station in the study with a functioning closed-circuit television (CCTV) system—and it is also the only one where a municipal administrator, rather than an operator association, holds management authority. Any reform process that does not explicitly incorporate passenger experience—including its gender dimension—as a management objective will replicate the shortcomings of existing arrangements in a more formalized institutional wrapper.



A bus loading passengers at Praça dos Trabalhadores in Maputo

©
Transitec
Consulting
Engineers

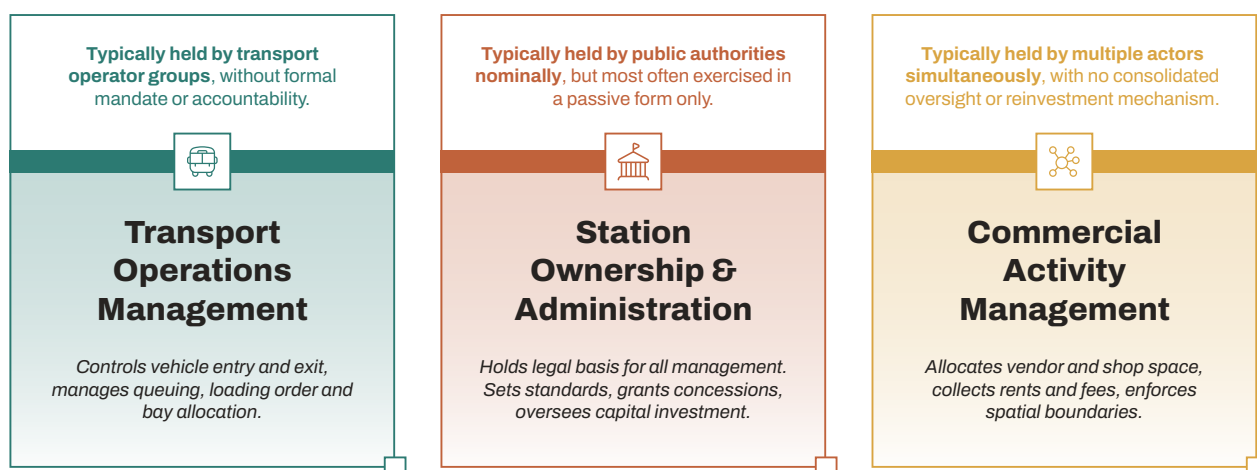
The spectrum of current management arrangements

The eight case studies cluster around four recognizable management models, organized by the degree to which management roles are formally defined and performed under explicit contractual obligations. At the informal end of the spectrum, stations are managed entirely by operator associations with no public authority involvement or with nominal public presence that fails to translate into effective governance. In the middle of the spectrum, some management roles have been partially institutionalized—a public company manages infrastructure while associations control operations, or a national agency provides oversight in some areas but not others—without the coordination framework needed to assign overall responsibility clearly. At the formally contracted end, stations operate under explicit agreements between a public authority and a private manager, with defined roles and—in principle—enforceable performance standards.

The most important finding from this spectrum is not that the formalized end performs better—though it generally does—but that the outcome of any given model depends critically on whether it is matched to the institutional context and whether the public authority has the capacity to enforce the arrangements it has put in place. Baux Maraîchers in Dakar, operating under a ten-year private concession managed by the Executive Council of Sustainable Urban Transport of Senegal (CETUD), demonstrates what a well-designed and actively monitored concession can achieve: unified management responsibility, systematized revenue collection, and sustained infrastructure maintenance. Makumbusho in Dar es Salaam, operating under a formally similar public-private partnership (PPP) structure, illustrates what happens when contract design is inadequate and enforcement capacity is absent: a commercially viable facility that underperforms as a transport station, with the public authority unable to enforce the obligations it nominally holds.

FIGURE 1

Schematic representation of the three main management roles to be fulfilled



Four alternative arrangements

Drawing on the case studies and on experience from comparable infrastructure contexts in Africa and beyond, the report presents four alternative institutional arrangements organized by the degree to which management roles are institutionalized and by the type of private actor involved.

- **Arrangement A—consolidated public management**—assigns unified responsibility for all management roles to a dedicated public entity, appropriate where commercial revenues are insufficient to attract private investment or where a period of public consolidation is needed before private-sector engagement becomes feasible (public ownership, public management).
- **Arrangement B—public ownership with contracted private operations management**—retains public ownership and oversight while contracting day-to-day management to a private operator (typically a specialized management company or formal association) under a formal performance agreement; it is the best-performing arrangement in the case study sample and the most appropriate for the majority of stations with sufficient revenue to sustain a private return (public ownership, contracted private management).
- **Arrangement C—shared investment with private construction and operations**—involves co-investment between public and private parties, typically a private developer or investor, through a Build-Operate-Transfer (BOT) structure, appropriate for stations with demonstrated commercial development potential but carrying the risk that the private investor prioritizes commercial returns over transport performance (mixed ownership, privately developed and operated, regulated by public authority).
- **Arrangement D—full private financing, construction, and operations**—is appropriate only for the small number of stations with very high and demonstrable commercial revenue potential sufficient to sustain a full private return without public subsidy, and where the private owner of station assets accepts binding regulatory obligations on transport performance (private asset ownership, private management, land and operations regulated).

The transition to electric mobility adds urgency to this choice: as charging infrastructure replaces paving and drainage as the critical investment challenges, the management arrangements capable of sustaining it need to be established now. This is addressed in the conclusion.

Conditions for transition

Selecting the right management arrangement is necessary but not sufficient. Three foundational preconditions must be in place before any reform can succeed, regardless of the target arrangement: secure land tenure, a clear and specific institutional mandate designating which public entity is legally responsible for station management, and basic contract management capacity within that entity. Where these preconditions are absent—as they are at most of the case study stations—establishing them is the first task of the reform process.

The sequencing of reform matters as much as its direction. Transitions are more likely to succeed when they move incrementally—beginning with public consolidation, formalizing one management role at a time, and extending the contractual framework progressively—rather than attempting a single large-step restructuring. Visible infrastructure improvement before governance reform is not merely pragmatic; it is politically necessary. A public authority that invests in paving, lighting, and sanitation establishes the credibility of its engagement and creates the social contract with operators and users that makes subsequent governance changes legitimate.

The political economy of reform must also be managed deliberately. Operator associations that currently control station access and revenue collection have a direct financial interest in resisting a clearer delineation of management roles that would reduce their influence. Reforms that create new stakeholders with a stake in the new arrangement—converting potential opponents into beneficiaries rather than displacing them—are more durable than those that attempt to impose change from above. The experience at Yaya Fofana in Abidjan, where former informal union workers were absorbed into the formal station management structure as employees, illustrates this principle. A station management committee—bringing together public authorities, operator associations, traders, and where applicable the private manager—provides a standing forum for conflict resolution and reform monitoring that reduces the risk of derailment without compromising management authority.

A nine-step assessment framework

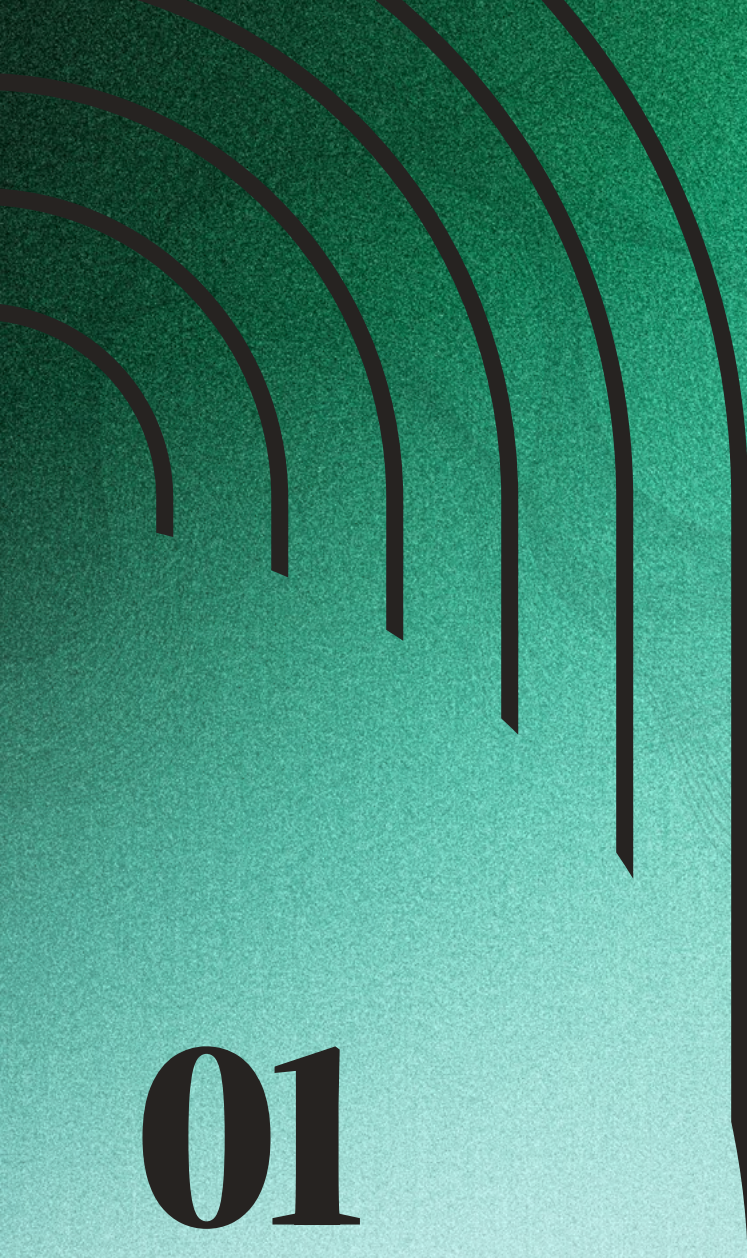
Chapter 5 provides a structured tool for matching a management arrangement to a specific context. The nine steps are organized in a deliberate sequence: four diagnostic steps establishing the current picture—infrastructure conditions, stakeholder roles and institutional arrangements, financial flows, and operator organizational capacity; two steps assessing the enabling environment—legal and regulatory framework, and land tenure; two steps assessing future potential—commercial development capacity, and the public authority’s contract management capacity; and a final synthesis step that selects the target arrangement and designs the transition pathway. The framework

is not a checklist—it is a consultative process that requires field data, stakeholder engagement, and honest assessment of institutional capacity. It is designed to be applied with external technical support in most contexts, and should be treated as a recurring diagnostic tool rather than a one-time exercise.

Policy priorities emerging from the analysis

Three priorities emerge from the analysis as the most consequential for decision-makers and their development partners. The first—and most foundational—is legal and regulatory clarification: national transport laws and metropolitan governance frameworks need to define explicitly what a bus station is, which tier of government is responsible for it, and under what legal basis a management concession can be granted. Without this, no public authority has unambiguous standing to act, and informal actors can resist reform by exploiting jurisdictional ambiguity. The second priority is contract management capacity: the case studies consistently show that the quality of governance arrangements depends less on the sophistication of the contract and more on the public authority's ability to monitor and enforce it. Building this capacity—through training, technical assistance, and dedicated institutional structures—is more valuable than designing elaborate contractual arrangements that cannot be implemented in practice. The third priority is integration into broader transport reform: bus station management should be a standard component of public transport investment programs, not an afterthought. The enabling conditions for better station governance can and should be built into the design of transport reform programs from the outset—ensuring that investments in new vehicles, BRT systems, and network restructuring deliver their intended value at the point where the transport system meets its users.

A well-governed station is not an end in itself. It is the point at which the transport system meets its users, and where the quality of that meeting is determined.

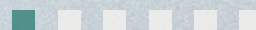


01

INTRODUCTION

Bus stations are among the most visible and economically active nodes in African cities. They serve as transfer points for millions of daily passengers and as commercial hubs supporting thousands of livelihoods—from formal shop operators to street vendors, mechanics, and food sellers. Stations connect workers to employment, neighborhoods to services, and local economies to regional markets. In cities where paratransit accounts for the majority of public transport trips, they are the primary interface between the transport system and its users.

Yet in most African cities, stations are also among the most poorly managed pieces of urban infrastructure. They emerged informally, operate without clear institutional frameworks, and receive little sustained investment. Understanding why this is the case—and what a better governance model would look like—is the central concern of this report.



1.1

THE CHALLENGE OF STATION MANAGEMENT IN AFRICAN CITIES

Most public transport stations across Sub-Saharan Africa were not planned. They developed organically in response to transport demand, on available public land near road junctions, markets, or commercial centers. Over time, they grew into complex, high-activity environments—handling tens of thousands of passengers a day, supporting hundreds of businesses, and generating substantial revenues—without the governance structures, institutional frameworks, or management capacity to match. Paratransit³ operators filled the vacuum left by absent public authorities, taking on management roles by default rather than by design. The result is a set of persistent, interrelated problems that this report examines through eight case studies in four cities.

Fragmented institutional responsibility

In most stations, no single entity is clearly responsible for managing the station as an integrated system. Ownership, operational management, commercial management, and regulatory oversight are distributed across multiple actors—municipalities, national transport authorities, operator associations, and informal actors—with limited coordination between them. Where stations straddle municipal boundaries, as at Colobane in Dakar, jurisdictional ambiguity compounds the problem: each authority avoids taking full responsibility, while each collects some form of revenue.

Public authorities tend to act as passive landowners or fee collectors rather than active infrastructure managers. In the most informal cases—such as Malhampsene in Maputo, which emerged entirely without official sanction—municipal authorities collect nothing at all and provide no maintenance, security, or investment in return. In other cases, revenues flow to general municipal funds with no earmarking for station operations or upkeep. The station as a managed asset has no institutional owner.

This fragmentation has a direct consequence for accountability. Where responsibility is diffuse, no entity has a clear incentive to maintain infrastructure, manage vehicle flows, enforce standards, or improve the user experience. The station functions—often tolerably—because operators and informal actors fill gaps in real time. But it does so despite its institutional environment, not because of it.

3. Also called informal or popular transport. See Box 1 for definitions.

Chronic underinvestment in infrastructure

The physical condition of most stations reflects the governance arrangements that govern them. Common deficiencies across the case studies include deteriorated or unpaved surfaces that flood in rain, lack of designated vehicle bays, inadequate waiting areas, poor lighting, and insufficient sanitation. Road access is frequently poor, generating congestion that extends well beyond the station perimeter and erodes the efficiency of the broader transport network.

The reinvestment problem is structural. Even where stations generate significant revenues from transport fees and commercial rents—as several of the case study stations do—those revenues rarely flow back into maintenance or capital improvement. They are captured by operator associations, absorbed into general municipal budgets, or divided among multiple fee-collecting actors. No entity has both the mandate and the financial means to reinvest. Infrastructure deficits therefore compound over time, reducing operational efficiency and deterring the private investment that could help address them.

Informal operations and unrealized economic potential

In the absence of formal management, stations are typically operated by transport operator associations or unions whose primary interest is organizing vehicle queues and collecting entry fees—not managing the station as a service facility. Operational decisions are driven by the interests of individual operators or associations rather than system-wide efficiency. Vehicle flows are managed informally, boarding and alighting practices are often unsafe, and maintenance is performed on an ad hoc basis, if at all.

This is not a failure of individual actors. Operator associations perform a real coordination function in environments where public institutions are absent. But their mandate is not station management, and their incentives do not align with passenger experience or infrastructure stewardship. The result is a persistent gap between the functions that stations perform and the management capacity brought to bear on them.

Stations occupy valuable urban land and generate substantial economic activity—from transport-related fees to commercial rents, informal trading, and ancillary services. Yet the revenues they produce are rarely captured in ways that benefit the station itself. Fragmented fee collection across multiple actors, the absence of reinvestment mechanisms, and weak contract enforcement mean that stations generate far less public value than their scale and location would support. Commercial activity compounds this picture: several stations function as significant economic nodes, hosting hundreds of businesses and serving as primary income sources for low-income households. Yet this commercial activity—and the revenues it generates—is

largely invisible to public authorities, uncaptured in public budgets, and unavailable for reinvestment. Private investors, faced with unclear governance and uncertain financial flows, have limited appetite for engagement—with the partial exceptions discussed later in this report.

A disconnect from broader transport reform

Across Sub-Saharan Africa, governments are investing in public transport improvement: vehicle recapitalization programs, Bus Rapid Transit systems, and network restructuring. Bus station management has received far less attention. This creates a structural gap. Vehicle and network improvements cannot deliver their intended impact if the stations where passengers access the system remain congested, unsafe, and poorly governed.

These challenges share a common root: public authorities lack clear frameworks for defining their role in station management, structuring private-sector participation, and sequencing reform over time. Technical and financial capacity is limited. And the informal governance arrangements that have evolved over decades are not simply inefficient—they represent entrenched interests and livelihoods that any reform process must engage rather than bypass.

This does not mean the status quo is fixed. Several of the stations examined in this study have developed management arrangements that perform markedly better—generating more revenue, maintaining infrastructure more reliably, and providing a better user experience. Understanding what distinguishes these cases is the starting point for the analysis that follows.



Passengers waiting at the Magufuri bus station in Dar es Salaam

©
Transitec
Consulting
Engineers

1.2

BUS STATION GOVERNANCE IN THE PARATRANSIT REFORM AGENDA

Efforts to reform informal public transport in African cities have increasingly converged around a shared understanding that no single intervention is sufficient. The SSATP publication *Embracing Informal Transport* (2025)⁴ synthesizes experience across the continent into five interdependent reform levers: (i) regulation—moving from laissez-faire arrangements to structured, government-overseen licensing and service agreements; (ii) sector organization—supporting operators to form legal entities capable of acting as accountable partners; (iii) vehicle financing—providing credible mechanisms for fleet renewal that the sector currently cannot access through conventional credit markets; (iv) operations and maintenance—improving efficiency, safety, and vehicle longevity; and (v) supporting infrastructure and systems—developing the physical and digital environment within which paratransit operates, including terminals, stops, priority infrastructure, and passenger information.

Bus station governance falls within this fifth lever. It is, however, a reform domain that has received disproportionately little analytical attention relative to its operational importance. Stations are the physical interface at which regulation is enforced, where organized operators must coordinate, and where the financial flows that sustain the sector are generated and distributed. A poorly governed station can undermine progress across all other reform levers: congestion at terminals negates the benefits of route rationalization; absent or contested management authority makes contractual arrangements with operators difficult to enforce; and underinvestment in station infrastructure deters the private sector engagement that reforms in organization and vehicle financing depend upon.

This paper addresses that gap. It does not replicate the broader reform agenda set out in *Embracing Informal Transport*, but situates itself as a concrete and actionable contribution to it—providing practitioners with a diagnostic framework and a set of institutional models specifically designed for the station governance challenge. It is intended to be read alongside the wider SSATP body of work as an operational entry point into the supporting infrastructure lever.

4. Arroyo-Arroyo, Fatima; Brendan Finn; Philip van Ryneveld. 2025. *Embracing Informal Transport: A New Paradigm for Urban Mobility. Transforming Challenges into Opportunities with Practical Tools and Strategies*. Washington, DC: SSATP.

1.3

ABOUT THIS REPORT

This report was produced by the Africa Transport Policy Program (SSATP) with support from the Public-Private Infrastructure Advisory Facility (PPIAF). It addresses a gap in the transport literature: while public transport reform in African cities has generated a substantial body of research on vehicles, routes, fares, and regulation, the governance of the physical stations through which passengers access these services has received comparatively little systematic attention.

The report draws on fieldwork conducted in four cities—Abidjan (Côte d'Ivoire), Dakar (Senegal), Dar es Salaam (Tanzania), and Maputo (Mozambique)—selected to represent a range of linguistic, institutional, and urban contexts across Sub-Saharan Africa. Participating transport authorities were identified through the African Association of Urban Mobility Authorities (AUMA). In each city, two stations were selected to capture variation in size, location, governance arrangements, and degree of formalization. The resulting eight case studies form the empirical foundation of the report. Detailed station profiles, including maps and stakeholder analyses, are provided in the appendix. Chapter 2 offers a thematic synthesis of the most analytically significant findings from the eight case studies.



Street vendors
in front of a bus
at Praça dos
Trabalhadores
in Maputo

©
Transitec
Consulting
Engineers

The research approach combined field visits, direct observation, vehicle and passenger counting, stakeholder interviews, and financial flow mapping. Data depth and quality varies across stations. Several key figures—particularly revenue estimates and vehicle volumes—are rough approximations, reflecting the difficulty of collecting precise financial data in environments where arrangements are often informal, verbal, or deliberately opaque. These limitations are acknowledged where relevant and do not materially affect the analytical conclusions.

The stations examined in this report accommodate a range of vehicle types, from minibuses and shared taxis to full-size buses. Vehicle size and mix vary by city and by the routes served: a single station may handle midi-buses and full-size buses simultaneously, or operate almost exclusively with minibuses (e.g., Colobane in Dakar and Malhampsene in Maputo, respectively). Several stations also serve as connection points with other transport modes—motorcycle taxis operate at the margins of some stations in the study, and some provide connectivity with rail networks (e.g., Colobane in Dakar). These multimodal dimensions are noted where relevant. The primary focus of this report, however, is on the management of paratransit collective services: the minibuses, midi-buses, and shared taxis that constitute the dominant mode of urban mobility across Sub-Saharan Africa and whose governance at station level remains the least studied and least reformed.

The rest of the report is structured around three analytical tasks. The first is diagnostic: Chapter 3 maps the stakeholders present at African bus stations, the roles they perform, and the conflicts that arise from current institutional arrangements. The second is typological: Chapter 4 characterizes the management models observed across the case studies and presents a set of alternative models drawing on experience from other infrastructure sectors. The third focuses on recommendations: Chapter 5 offers a nine-step assessment framework to help decision-makers evaluate their context and identify an appropriate management model and transition pathway. Chapter 6 concludes the report, and short case studies of the individual stations are presented in appendix.

The primary audience is transport authorities and municipalities in Africa considering how to improve the governance and performance of their stations. The report may also be of interest to development finance institutions, private sector operators, and researchers working on urban mobility and infrastructure governance.

BOX 1

Definition of key terms



Bus station (or “station” in this report) refers to a designated facility—formal or informal, purpose-built or organically established—that serves as an origin or destination point for multiple paratransit routes, where collective vehicles load, wait, and depart in an organized or semi-organized manner. The term “bus” is used broadly to encompass the range of collective road-based vehicles found in African cities: minibuses, midi-buses, shared taxis, and full-size buses. The term “station” is preferred over “terminal” for its neutrality—it carries no presupposition about the level of formality, infrastructure quality, or built environment of the facility. The paper does not address on-street stops, vehicle depots used solely for overnight parking or maintenance, or services operated exclusively by motorcycles or three-wheelers), except where these share facilities with collective vehicle operations.



Formalization refers to the degree to which a role or arrangement is defined in writing, recognized by a public authority, and subject to some form of accountability. Two terms used in this report emphasize different aspects of this process: institutionalization highlights the embedding of a role within a recognized organizational structure with defined responsibilities and some degree of durability; contractualization highlights the establishment of explicit obligations materialized by a written agreement between two parties, with defined roles and performance standards.



Management refers to the operational authority to direct day-to-day station functions, including vehicle access, fee collection, maintenance, and commercial activity. Ownership and management are treated as analytically distinct throughout this report, even where they are held by the same entity.



Ownership refers to legal title to station land and assets. In most cases examined, ownership is held by a public authority—a municipality, metropolitan authority, or national agency. Ownership confers the legal basis for all other management arrangements but does not in itself imply active management.



Paratransit refers to privately owned, demand-responsive passenger transport services that operate outside the formal public transport system, typically without public subsidy or operational oversight. In African cities, paratransit is the dominant mode of urban mobility, serving the vast majority of daily trips. Collective services are most commonly provided by minibuses, buses, and shared taxis, individually owned and operated on a daily rental basis, and organized through driver unions or owner associations.



Professionalization refers to the process by which actors performing management roles at a bus station develop and demonstrate the organizational capacity, competencies, and systems needed to fulfill those roles reliably and accountably. A professionalized management arrangement is not necessarily one that is formally contracted—it is one in which the manager has the internal capacity to fulfill its role: defined procedures, qualified staff, financial management systems, and mechanisms for monitoring and reporting performance. Professionalization is therefore a quality of the actors involved, whereas contractualization describes the nature of the agreement between them; the two are related but distinct.



02

STATIONS IN CONTEXT: EVIDENCE FROM FOUR CITIES

The eight case studies reveal a wide spectrum of management arrangements, from entirely informal to formally conceded, and a set of recurring governance challenges that cut across contexts. This chapter draws out the most analytically significant features.



2.1

HOW STATIONS COME INTO BEING

A striking feature of the eight stations is how few were planned. Most emerged in response to transport demand, on whatever land was available—road reserves, vacant plots, spaces adjacent to markets or fuel stations. Operators stopped there because passengers were there, and over time these locations solidified into stations by force of habit rather than design.

Malhampsene in Maputo is the clearest case. Operators occupied a plot along National Road 4 without public authorization; the station has never been formally constituted and has no fixed boundaries, no public infrastructure, and no relationship with municipal authorities beyond their mutual awareness of each other's existence. Djéni Kobénan in Abidjan has a similar character: the owner of an adjacent fuel station progressively extended his operations onto neighboring public land—road reserve left over from a highway interchange—and a station crystallized around that foothold. The land tenure situation remains unresolved.

Even stations that were formally created often developed in ways their designers did not anticipate. Zimpeto in Maputo was built by the Municipal Mobility and Parking Company (EMME) as part of the infrastructure package for the 2011 African Olympic Games. Demand rapidly exceeded its design capacity, and its interface with the surrounding road network—never adequately planned—has remained a source of congestion ever since. Colobane in Dakar was originally structured to host three distinct vehicle types under the oversight of the Executive Council of Sustainable Urban Transport (CETUD); within a short period, CETUD was effectively removed from the management circuit, and the station fragmented into the jurisdictionally ambiguous arrangement that persists today.

Some notable exceptions offer valuable lessons. The Baux Maraîchers station in Dakar was designed from the outset as a large interurban transport facility, financed by the state and managed by CETUD under a formal concession. Mbezi in Dar es Salaam was developed by the Tanzania National Roads Agency (TANROADS) on road reserve land, with paved parking, shelters, and BRT integration built in by design. Yaya Fofana in Abidjan was the result of a deliberate political decision by the Mayor of the municipality of Koumassi, who identified a vacant plot and commissioned a private developer to build and operate a purpose-built facility. These planned stations are not uniformly better managed than their informal counterparts—Makumbusho in Dar es

Salaam, modernized in 2014 under a PPP agreement, has struggled operationally despite its planned origins—but they tend to start with clearer institutional mandates and legal frameworks that informal stations must subsequently construct, if they construct them at all.

The manner in which a station comes into being shapes the governance conditions it inherits. Stations with spontaneous or clandestine origins carry a structural deficit: no authority was ever assigned responsibility for them, no legal framework governs their operation, and the informal arrangements that fill the vacuum are resistant to reform. This is the context in which the management arrangements described in the sections that follow must be understood.

TABLE 2

Key characteristics of the eight case study stations

City	Station	Pax/day [~vehicles]	Size	Vehicle types	Management
Dakar	Colobane	~49,400 [~1,560 vehicles]	1.91 ha	Midi-buses, minibuses, formal buses, taxis	Fragmented; no formal contract; jurisdiction disputed between two municipalities and CETUD
	Baux Maraîchers	~10,100 [~1,350 vehicles]	10.5 ha	Interurban/ international coaches, minibuses	10-year private concession under CETUD oversight
Abidjan	Yaya Fofana	~19,700 [~1,315 vehicles]	0.5 ha	Shared taxis, 7-seaters, minibuses	Municipal ownership; private-built premises; ticketing system piloted
	Djéni Kobénan	~27,200 [~905 vehicles]	0.4 ha	Minibuses, shared taxis	Informal verbal arrangement with municipality; no formal infrastructure
Maputo	Zimpeto	~55,000 [~2,200 vehicles]	1.0 ha	Minibuses, large buses	Municipal company (EMME) + police + operator associations; fragmented fee collection
	Malhampsene	~46,300 [~1,850 vehicles]	2.81 ha	Minibuses, various buses	Entirely informal; operator-led; no public involvement; no infrastructure
Dar es Salaam	Makumbusho	~53,400 [~2,425 vehicles]	0.9 ha	Minibuses, motorcycles, tricycles	PPP (municipality + private partner); private focus on commercial revenues
	Mbezi	~34,500 [~1,400 vehicles]	2.3 ha	Minibuses, BRT buses, motorcycles, tricycles	Managed by TANROADS; dual yard (paved BRT level / unpaved local level)

2.2

A SPECTRUM OF MANAGEMENT ARRANGEMENTS

The eight stations present a continuum of management arrangements, from entirely operator-led informality to formal private concession under public oversight. Three broad groupings emerge from the case studies.

The informal end of the spectrum

Stations are managed by transport operator associations with little or no public authority involvement. Malhampsene in Maputo is the limiting case: associations organize vehicle queues, collect daily fees from drivers, and perform whatever maintenance occurs—all without a formal mandate, a contract, or any relationship with the municipality. The station functions because operators need it to, not because any entity manages it in any meaningful institutional sense. No public investment has ever been made; no revenue flows to municipal budgets. The associations' authority derives not from any legal instrument but from their practical control over vehicle access—a form of governance that is stable under current conditions but has no mechanism for improvement.

Colobane in Dakar presents a different form of informality—one that is more visible, more contested, and in some ways more resistant to reform. The station is large and heavily used, and CETUD, the transport authority, has a formal role on paper. In practice, management is fragmented across two municipal jurisdictions and an informal station manager who holds a contract with one municipality but not the other. CETUD exercises limited oversight. Each authority collects some fees; none assumes responsibility for maintenance or investment. The station's value as an intermodal hub—connecting paratransit services with the regional rail network—is substantially undermined by the governance vacuum at its center. Its dysfunction is not technical but political: multiple actors benefit from the current arrangement and have limited incentive to reform it.

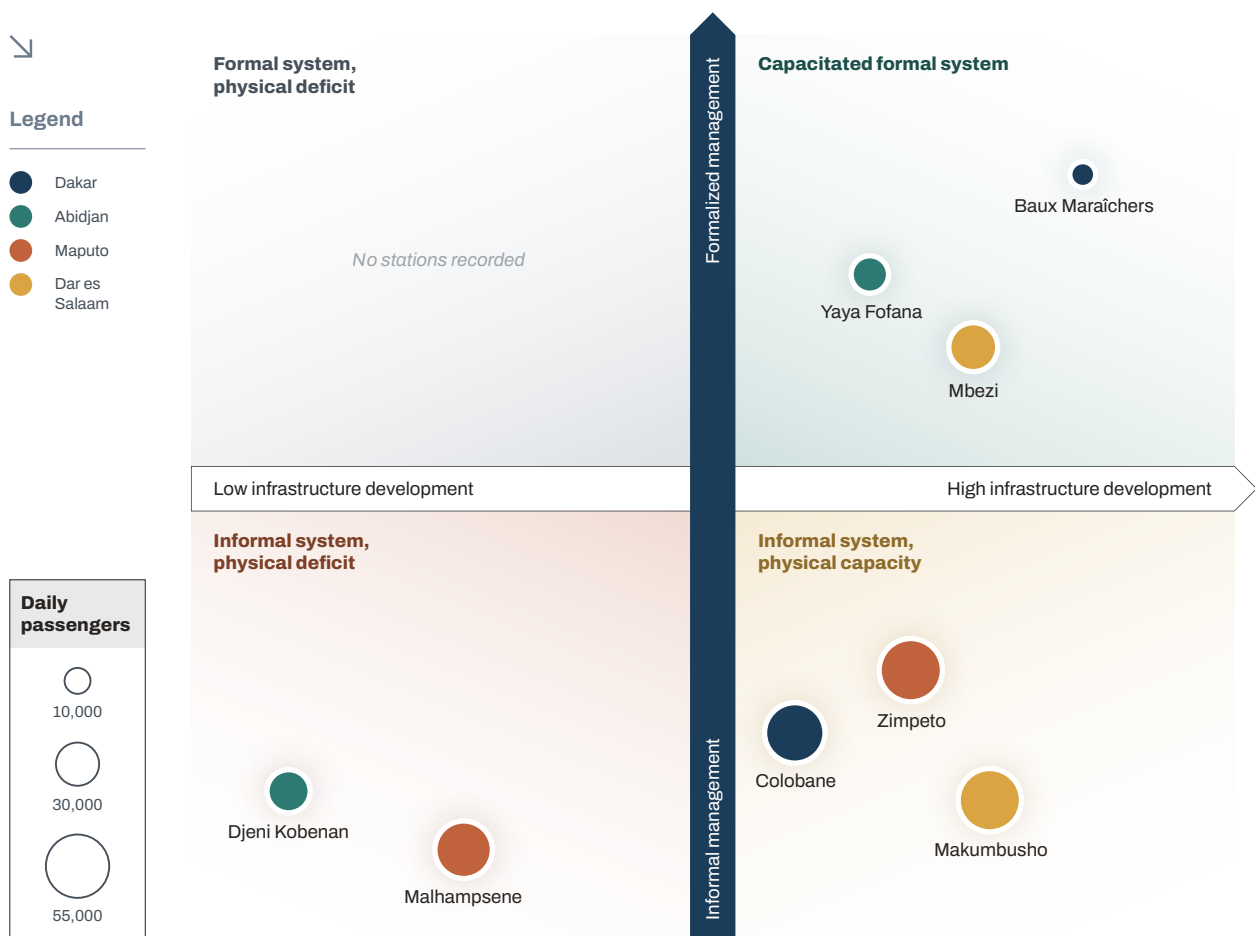
The middle of the spectrum

Several stations operate under partially formalized arrangements where public authorities are present but management roles remain divided. At Zimpeto in Maputo, the municipal company EMME manages the physical infrastructure and the municipal

police collect transport fees, while operator associations retain control over vehicle scheduling and departure management. This division of labor functions tolerably, but responsibility for maintenance falls into the gap between the two: a section of deteriorated pavement at the entrance of the station has remained unrepaired for years because no party accepts ownership of the problem. The arrangement is stable but self-limiting—it produces no institutional incentive to invest or improve.

Mbezi in Dar es Salaam is managed by TANROADS, the national road agency, giving it a formally public character unusual among the case study stations. Its upper level—connected to the BRT system operated by DART—is of a noticeably higher infrastructure standard than its lower level, which serves local paratransit routes under less systematic management. The station illustrates how a single facility can host two

FIGURE 2 Governance and infrastructure status of the eight stations



governance regimes simultaneously, with markedly different outcomes for users. It also raises a broader question about the appropriate level of government for station management: national road agencies bring resources and technical capacity, but their mandate does not naturally extend to the day-to-day operational demands of a busy urban bus station.

Djéni Kobénan in Abidjan occupies an unusual position on the spectrum. It sits on land whose ownership is legally ambiguous—part private, part public road reserve—and is managed by an individual from the paratransit sector under a verbal arrangement with the municipality. Management is informal and non-neutral: the manager is associated with one of the operator unions, creating a structural conflict of interest in a facility that serves multiple associations. This arrangement has persisted because it is convenient for all parties in the short term, but it offers no pathway toward improved infrastructure or service standards.

The professionalized end of the spectrum

Baux Maraîchers in Dakar and Makumbusho in Dar es Salaam have both undergone formal governance restructuring, though with very different results. Baux Maraîchers operates under a ten-year concession granted by CETUD to a private company. The concessionaire manages all transport operations, collects fees, maintains the facility, and operates commercial spaces—a unified management structure that eliminates the fragmentation found elsewhere. The station is paved, organized by vehicle type, and visibly well maintained. It generates the highest revenues of any station in the study by a wide margin. Critically, the concession structure gives the private operator a financial incentive to maintain quality: fee revenues depend on operators choosing to use the station, which in turn depends on the station providing a reliable and orderly environment.

Makumbusho was redeveloped in 2014 under a PPP agreement between Kinondoni Municipality and a private partner, Eastern Capital Ltd., which built and now operates a four-story commercial building with paved parking. The infrastructure improvement over the previous station was real. In transport management terms, however, the outcome has been less successful. The private partner's interests are primarily commercial; responsibility for the transport operating environment—lighting, pavement maintenance, bay management—sits in a governance gap between the municipality and the operator. The contract does not clearly assign these obligations, and they have gone unmet. Makumbusho is a commercially viable facility that underperforms as a transport station. It illustrates a risk that recurs across the study: that PPP arrangements designed primarily around real estate development tend to neglect the transport function they are meant to serve.

Yaya Fofana in Abidjan adds a further cautionary note. Purpose-built by a private developer under a “build-and-operate” contract with Koumassi Municipality, it was developed with a host of functionalities—designated parking bays, passenger waiting areas, a car wash, mechanical workshops, and childcare facility. The municipality deliberately removed operator associations from management to reduce conflict, hiring former association members as station employees instead. Upper-floor commercial premises have remained largely vacant, revealing a gap between the investor’s revenue logic and the actual behavior of users that no governance arrangement has been able to correct after the fact. This is a reminder that station design and governance design need to proceed together.

2.3

FINANCIAL FLOWS AND THE REINVESTMENT GAP

Stations generate revenue from two main sources: transport-related fees—parking, entry, and per-departure charges paid by vehicle operators—and commercial income from rents and vending fees paid by businesses operating within the station perimeter. In most of the case study stations, both streams are collected by multiple actors simultaneously, with no single entity controlling the full financial picture.

The scale of revenues varies enormously. Daily transport-related revenue collected by those in charge of managing the eight stations ranges from less than US\$40 at Malhampsene in Maputo to close to US\$8,000 at Baux Maraîchers in Dakar.⁵ This gap is not simply a function of traffic volume—Malhampsene handles substantial vehicle movements—but of how completely and systematically fee collection has been organized. At the more formalized stations, a single manager controls access and collects fees from all entering vehicles; at the most informal ones, collection is fragmented across associations, municipal agents, and informal collectors, each capturing a share with limited transparency or accountability.

5. Revenue figures are expressed in US dollars (USD) to allow comparison across countries. Local currency amounts have been converted at the following rates: West African CFA franc (FCFA) 587.17 per USD; Mozambican metical (MT) 45.7 per USD; Tanzanian shilling (TZS) 2,723.69 per USD. For stations where no formal accounting records exist, figures represent approximations derived from vehicle counting and fee schedules reported by station managers and operator association representatives during fieldwork; they should be read as orders of magnitude rather than precise accounting values.

What is consistent across almost all stations is what does not happen with these revenues: they are not reinvested in infrastructure. Transport fees collected by operator associations flow to their members or to association operating costs. Municipal revenues enter general budgets and are not earmarked for station maintenance. Private managers focus on extracting returns on their initial investment rather than on ongoing capital improvement. The entity responsible for the station's physical

TABLE 3**Daily operator fee collection and distribution across case study stations**

Station	Daily station fees collected ⁶	Share paid to station manager	Share paid to transport operator groups	Fee collection mechanism	Sources of commercial revenue
Baux Maraîchers	~\$7,902	100%	0%	Centralized-concessionaire	101 [99 stalls, 14 street vendors]
Zimpeto	~\$1,346	28%	72%	Dual- municipal police + associations	155 [61 stalls, 94 street vendors]
Colobane	~\$1,098	76%	⁷	Cash / hand-to-hand per vehicle type	101 [94 stalls, 7 street vendors]
Djéni Kobénan	~\$427	22%	0%	Daily cash fees per operator	47 [14 shops, 28 stalls, 5 street vendors]
Yaya Fofana	~\$349	100%	0%	Ticketing counter	49 [all brick and mortar shops]
Makumbusho	~\$154	57% (municipality)	43% (union)	Parking fee + union trip fee	157 [40 shops, 30 stalls, 57 street vendors]
Mbezi	~\$69	58% (TANROADS)	42% (union)	Parking fee + union trip fee	223 [145 built, 42 stalls, 36 street vendors]
Malhampsene	~\$37	0%	100%	Hand-to-hand daily fee; no institutional involvement	96 [25 stalls, 71 street vendors]

6. Daily station fees collected include parking, entry and departure charges levied on operators; farebox revenues paid by passengers to drivers are excluded.

7. At Colobane, revenues nominally attributed to the station manager are effectively captured by professional bodies and unions linked to the management structure.

infrastructure—often a public body—either collects no revenue at all or lacks the mandate to ring-fence it for reinvestment. The result is a structural reinvestment gap: stations generate cash flows that could fund their own maintenance and improvement, but the governance arrangements controlling those flows prevent reinvestment from occurring.

Baux Maraîchers discussed in detail in section 4.1 is the partial exception that illustrates what a different arrangement can achieve, one where the financial incentive and the maintenance responsibility are held by the same entity. At Makumbusho, a similar PPP logic was attempted but the contract did not clearly assign maintenance obligations; the result is that revenues flow to the private partner while infrastructure deteriorates at the municipality's expense.

The broader implication is that the reinvestment gap is not primarily a resource problem. Several of the case study stations generate revenues that, if captured and directed appropriately, would be sufficient to fund basic maintenance. The problem is institutional: the governance arrangements controlling financial flows were not designed with reinvestment in mind and reforming them requires precisely the kind of clear role assignment and contractual discipline that subsequent chapters of this report address.

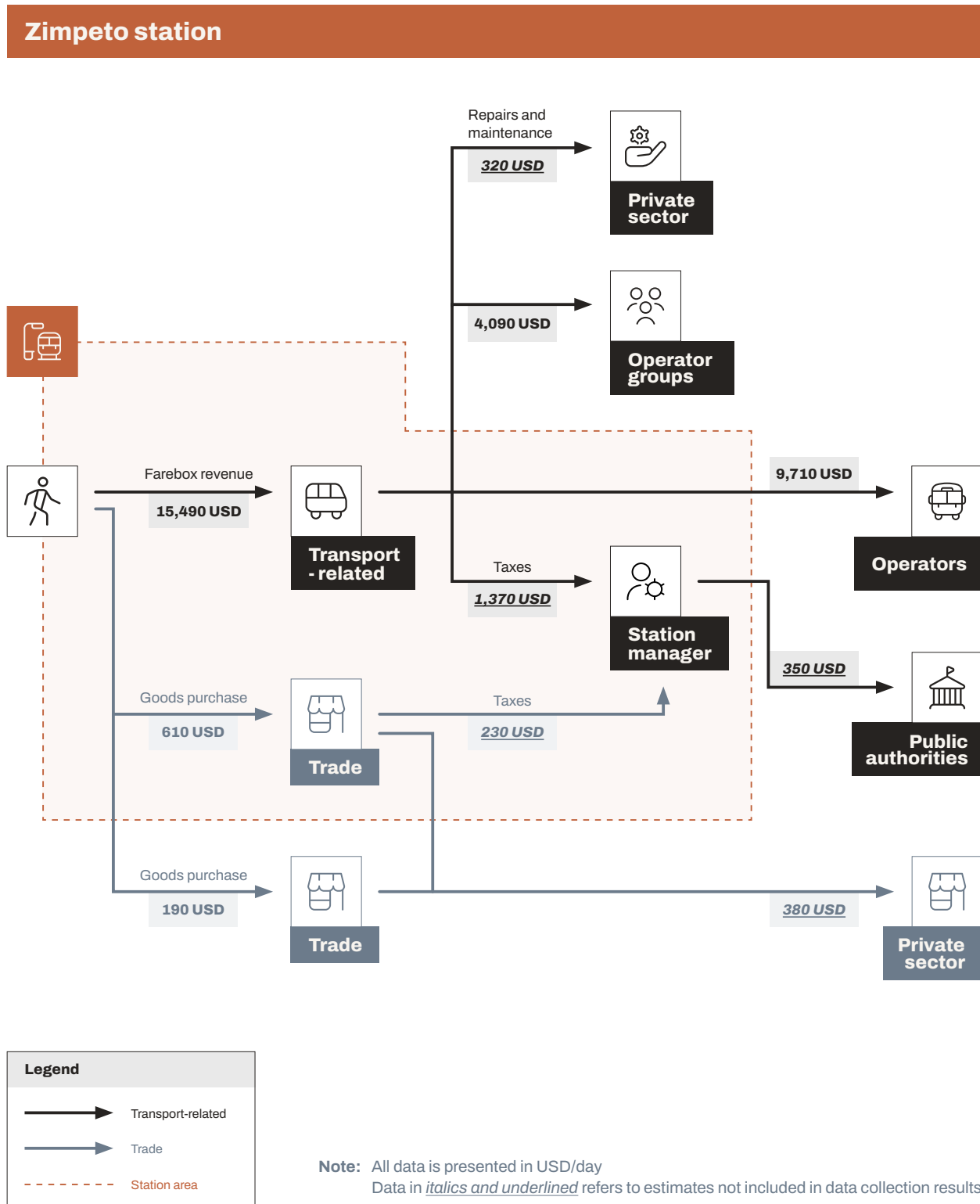


Ndiaga Ndiaye
(paratransit) vehicles
loading passengers
in Dakar



©
Transitec
Consulting
Engineers

FIGURE 3
Illustration of detailed financial flows at Zimpeto station





03

WHO DOES WHAT: STAKEHOLDERS, ROLES, AND CONFLICTING INTERESTS

Bus stations concentrate a diverse set of actors—public authorities, transport operators, commercial interests, and users—each with distinct mandates, resources, and incentives. Understanding who does what, and where interests diverge, is the foundation for diagnosing why current management arrangements underperform and for designing better ones. This chapter maps the main stakeholder groups present at bus stations in African cities, the management roles that need to be performed for a station to function effectively, and the conflicts that arise when those roles are poorly assigned or left to informal negotiation.



3.1

A TYPOLOGY OF STAKEHOLDERS

Five broad categories of stakeholders are present at bus stations, each playing a different role in how the station functions—or fails to.

Public authorities

They are present at multiple levels. Municipalities and “communes” typically hold ownership of the land on which stations sit and bear nominal responsibility for infrastructure. Metropolitan transport authorities—such as Dakar’s metropolitan Transport Authority, the Conseil Executif des Transports Urbains Durables (CETUD), the Urban Mobility Authority of Greater Abidjan (AMUGA), or the Dar es Salaam Rapid Transit Agency (DART)—hold regulatory and planning functions over the transport services using the station. National agencies—such as Tanzania National Roads Authority (TANROADS)—occasionally own or manage station infrastructure directly, as at Mbezi in Dar es Salaam.

In practice, these levels of government do not always coordinate effectively, and their respective roles at any given station are often undefined or simply unenforced. The most common outcome is that public authorities act as passive landowners: they collect land-use fees or taxes but do not actively manage the station, invest in its infrastructure, or exercise meaningful regulatory oversight. The fees they collect flow into general budgets rather than being earmarked for station maintenance. Where multiple public authorities are present—as at Colobane, where the station straddles two municipalities and falls nominally under CETUD’s oversight—responsibility diffuses to the point where no authority bears effective accountability. Each entity collects some revenue; none assumes the cost or obligation of management.

This passivity is not always a product of indifference. In many cases, public authorities lack the technical capacity, staffing, and legal instruments to act as active station managers. Transport authorities are generally geared towards planning, managing, and regulating networks, not operating facilities. Municipalities carry responsibility for a wide range of urban services with limited budgets. And the institutional framework for bus station management—defining who is responsible for what, under what legal basis, with what financial means—is simply absent in most cities studied. The consequence is a governance vacuum that other actors fill, not always well.

In cities where formal public transport services—such as BRT or publicly operated bus networks—coexist with paratransit, these services are typically managed directly by public authorities and operate from physically distinct infrastructure. Because formal and informal modes rarely share station facilities, formal public transport does not emerge as a distinct stakeholder category in this analysis; its integration with paratransit at the network level will be the subject of an upcoming SSATP publication.

Transport operators

At African bus stations, they are, in most cases, paratransit operators: owners and drivers of minibuses, shared taxis, and midi-buses that provide the majority of urban public transport trips. Their relevant form is collective: unions, associations, and cooperatives that organize their members' access to the station, manage vehicle flows on a day-to-day basis, and in many cases collect fees from drivers. In the absence of formal management structures, these bodies assume management functions (queue management, allocation of departure slots, basic security) by default rather than by design.

The fill-and-go system that governs departures at most paratransit stations—whereby a vehicle departs only once it is full—means that associations must actively manage the order in which vehicles load. This gives them a natural and necessary coordinating role. At the ground level, this coordination is often carried out by specialized individuals: route managers who oversee departure order for a specific line and ensure the first-to-come, first-to-fill principle is respected; and, in Maputo specifically, *modjeiros*—informal workers who solicit passengers for specific destinations and help organize queuing and loading in exchange for a small per-vehicle fee.

The coordinating role of operator associations easily extends, however, into broader control over station access and revenue collection. At Malhampsene in Maputo, Colobane in Dakar, and Djéni Kobénan in Abidjan, associations are effectively the station managers—not as a temporary measure but as a settled, entrenched arrangement. Their primary obligation is to their members: to ensure that vehicles move, that revenues are collected, and that the association maintains its position. Passenger experience, infrastructure maintenance, and long-term investment are secondary concerns—not because associations are indifferent to these matters, but because their mandate does not extend to them and their financial model does not reward them. Wherever operator associations fill the governance vacuum, passenger interests are systematically subordinated to the operational and financial priorities of those who control access.

Traders and vendors

This category encompasses all commercial actors who generate income from the station's footfall: shopkeepers occupying fixed premises, food and drink sellers, hawkers moving through the vehicle and waiting areas, and service providers such as mechanics, car washers, and money changers. Their presence is a defining feature of African bus stations—in many cases, the commercial activity they generate exceeds the transport activity in terms of visible intensity and economic value to surrounding households. They pay fees—daily or monthly, formal or informal—to whoever controls access to the space they occupy, whether that is a municipal agent, an operator association, or a private manager.

In more informal stations, vendors' tenure is precarious and their spatial boundaries are negotiated informally and continuously. In stations with more structured commercial arrangements, as at Baux Maraîchers or Yaya Fofana, commercial space is formally allocated and rents are contractually defined. In both cases, vendors' spatial competition with vehicles is a persistent source of operational friction: without active spatial zoning and enforcement, commercial activity tends to encroach progressively on transport space, degrading both functions over time.

Private investors and concessionaires

They form a distinct category whose presence fundamentally changes the governance equation. These are entities—such as Eastern Capital Ltd. at Makumbusho or the private concessionaire at Baux Maraîchers—that have made a capital investment in station infrastructure under a contractual arrangement with a public authority, and that derive revenue from operating the station commercially. They bring financial resources and professional management capacity that public authorities typically lack. Their primary interest, however, is a return on investment, which may or may not align with the transport performance objectives of the public authority. How the contract between the two parties is structured—particularly regarding maintenance obligations, revenue sharing, and performance standards—determines whether the arrangement serves the station's transport function or subordinates it to commercial logic.

Users and passengers

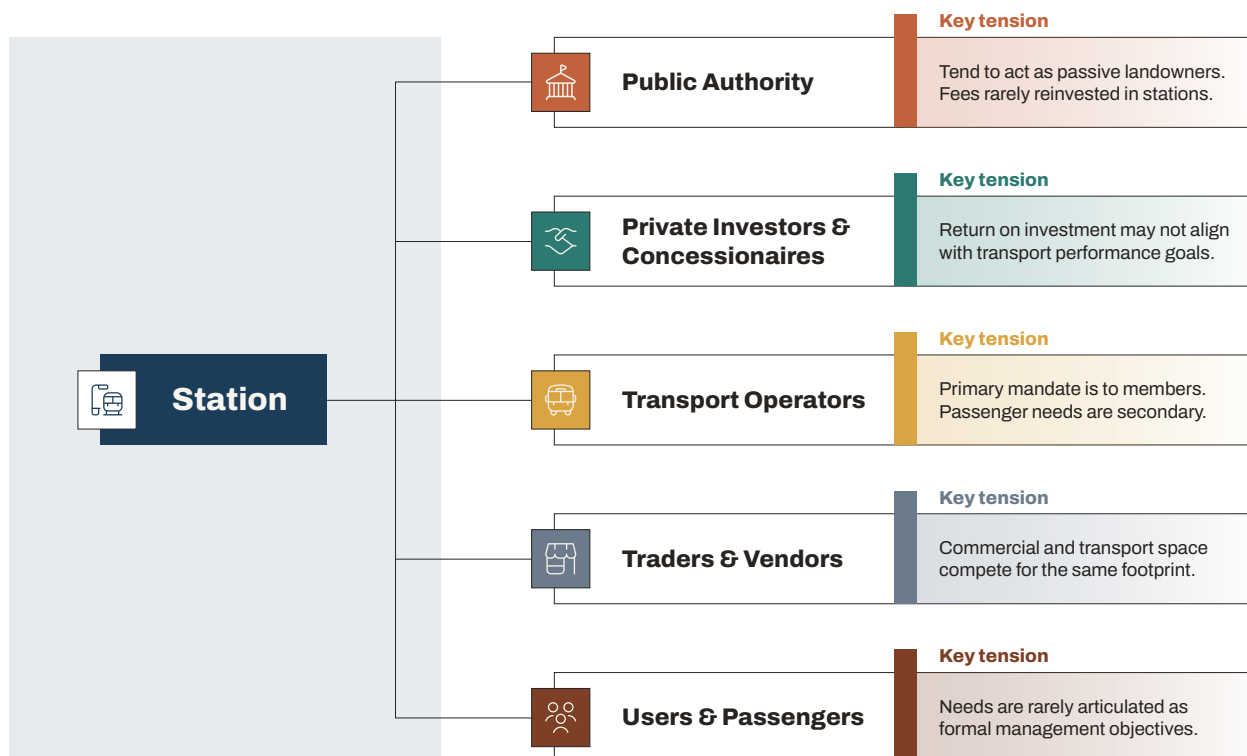
They are, in a meaningful sense, the reason stations exist—and the stakeholder group least represented in their governance. Passengers are the primary source of revenue for the entire station ecosystem: fares paid to operators and purchases made from vendors are the origin of virtually all income flows. Yet their needs—for safety, shelter, information, predictable journey times, and accessible facilities—are rarely articulated

as management objectives. Stations are designed around vehicle movements, not passenger experience.

This marginalization has a gender dimension that the case studies make visible. The paratransit sector is overwhelmingly male: drivers, operators, association officials, and informal station managers are almost exclusively men. Women represent a large share of station users and vendors, but their needs—adequate lighting, secure waiting areas, gender-separated sanitation—are systematically underweighted in management decisions. At Makumbusho, non-functional lighting has made the station unsafe after dark, affecting women disproportionately. Yaya Fofana is the only station in the study with a functioning closed-circuit television system, and it is notable that it is also the only one where a municipal administrator—rather than an operator association—holds management authority. The correlation is not coincidental.

FIGURE 4

Main stakeholders' categories and their challenges



3.2

KEY MANAGEMENT ROLES

Identifying who the stakeholders are is only part of the diagnostic picture. A functioning bus station requires a specific set of management tasks to be performed reliably, day in and day out. These tasks can be grouped into three core roles: transport operations management, commercial activity management, and station ownership and administration. In practice, these roles may be held by the same entity or divided across several—but they cannot be left unperformed. When they are, the consequences are visible in congestion, deteriorating infrastructure, revenue leakage, and declining service quality.

Transport operations management

Transport operations is the most immediately visible management function. It encompasses the day-to-day organization of vehicle flows: controlling entry and exit, managing queuing and loading order, allocating bay space to different routes and vehicle types, and enforcing operational rules. In a paratransit context governed by the fill-and-go principle, these tasks require continuous, on-the-ground coordination. A vehicle arriving at a station needs to know where to queue, in what order it will load, and when it can depart—decisions that must be made in real time, for dozens or hundreds of vehicles simultaneously. At stations handling more than 2,000 vehicle entries per day—as at Makumbusho and Zimpeto—this is a demanding logistical function.

At the ground level, route managers and *modjeiros*, described in section 3.1, provide this coordination, performing functions that no public authority currently assumes. These roles are unregulated and formally unrecognized, but they perform a real and necessary function that no public authority currently provides.

Beyond flow management, the transport operations role also covers basic upkeep of the transport operating environment: ensuring that bays are usable, that circulation areas are not obstructed by parked vehicles or vendor stalls, and that the interface between the station and the surrounding road network does not generate congestion that spills into adjacent streets. This last point is frequently neglected. At Zimpeto in Maputo, vehicles queuing to enter block the access road while others struggle to exit over broken pavement—a failure of road-station interface planning that no entity has taken responsibility for resolving. At Djéni Kobénan in Abidjan, vehicles routinely bypass the station during peak hours to avoid congestion on the adjacent highway interchange, forcing passengers to board from the roadside at significant risk to their safety.

In most of the case study stations, transport operations management is performed by operator associations—by default, and without a formal mandate. This produces a specific and recurring distortion. At Djéni Kobéna, the station manager accepts only vehicles from his own association or affiliated unions, effectively excluding competitors. At Malhampsene, associations control all access and revenue collection, with no mechanism for accountability to passengers or public authorities. The transport operations function is performed but its terms are set entirely by those who benefit from it. Yaya Fofana in Abidjan offers a partial counterexample: when the municipality removed operator associations from management and appointed its own station manager by decree—hiring former association members as station employees to reduce conflict—operational order improved markedly. The contrast with nearby Djéni Kobéna, where association control remains unchallenged, is instructive.

Commercial activity management

This category covers the allocation, administration, and maintenance of spaces used for trading and services within the station perimeter—fixed shops, market stalls, food and drink vendors, car washes, mechanical workshops, and other ancillary services. The primary tasks are space allocation, rent or fee collection, enforcement of spatial boundaries, and upkeep of commercial infrastructure. In stations with a significant commercial footprint, this is a substantial management function in its own right: for instance, Mbezi in Dar es Salaam hosts 223 businesses, and Makumbusho features a four-story commercial building managed by Eastern Capital Ltd., whose primary financial interest lies in maximizing occupancy and rental income.

The commercial management role matters for a further reason: it is the revenue stream most amenable to professionalization. Transport fees are often small, collected in cash from individual drivers, and practically difficult to systematize in a fragmented paratransit environment. Commercial rents, by contrast, can be formalized through written contracts, collected monthly, and subjected to audit. Stations that have formalized their commercial space management tend to generate substantially more revenue than those that have not. At Baux Maraîchers, where the private concessionaire manages both transport and commercial operations under a single contract, revenues reflect the combined effect of systematized fee collection and fully occupied commercial premises. At Colobane, where commercial activity is informally organized and spatially contested, revenues are collected by multiple actors but reinvested by none.

The tension between commercial and transport management is persistent and structural. Vendors need space; vehicles need space; and the station's physical footprint is finite. At Zimpeto in Maputo, informal vendors have progressively

occupied vehicle parking bays and station entrances, contributing to congestion that has resulted in accidents. At Colobane in Dakar, the queue of Ndiaga Ndiaye vehicles waiting to load generates congestion that undermines the commercial viability of adjacent shops—a dynamic that neither the transport manager nor the commercial actors have the authority or incentive to resolve alone. In the absence of a management entity with authority over both functions simultaneously, the boundary between commercial and transport space tends to shift progressively in favor of traders, who are present continuously and whose occupation of space is difficult to reverse once established.

At Makumbusho, the separation of transport and commercial management between two distinct entities—the municipality and a management agent—has produced precisely this outcome. The private partner's focus on commercial revenues has left basic transport infrastructure, such as pavement maintenance, bay management, and lighting, in a governance gap. Hence, the repair of each item sits between the municipality's mandate and the operator's commercial focus so none gets done. City police remove street vendors to protect the commercial tenants' interests, but no entity takes responsibility for the infrastructure failures that make the station unsafe after dark.

Station ownership and administration

This dimension is the third core role, and in principle the most authoritative. The station owner—typically a public authority—holds the legal basis for all other management arrangements: the right to allocate space, grant concessions, set operational standards, and enforce compliance. In practice, this role is the most systematically underperformed of the three. Public authorities tend to exercise ownership in its most passive form—collecting land-use fees or issuing informal authorizations—without translating their legal position into active management authority.

The consequences of this passivity are well illustrated by the case study stations. At Malhampsene, the municipality has never asserted ownership over a station that sits on municipal land: it collects nothing, provides nothing, and exercises no oversight. At Colobane, two municipalities both claim partial jurisdiction but neither assumes management responsibility; the result is a station that is nominally public but effectively ungoverned. At Djéni Kobénan, a private individual has effectively appropriated public road reserve land—building infrastructure, establishing management arrangements, and extracting revenues—without any formal concession or contractual framework, because the relevant public authority has never exercised its ownership rights.

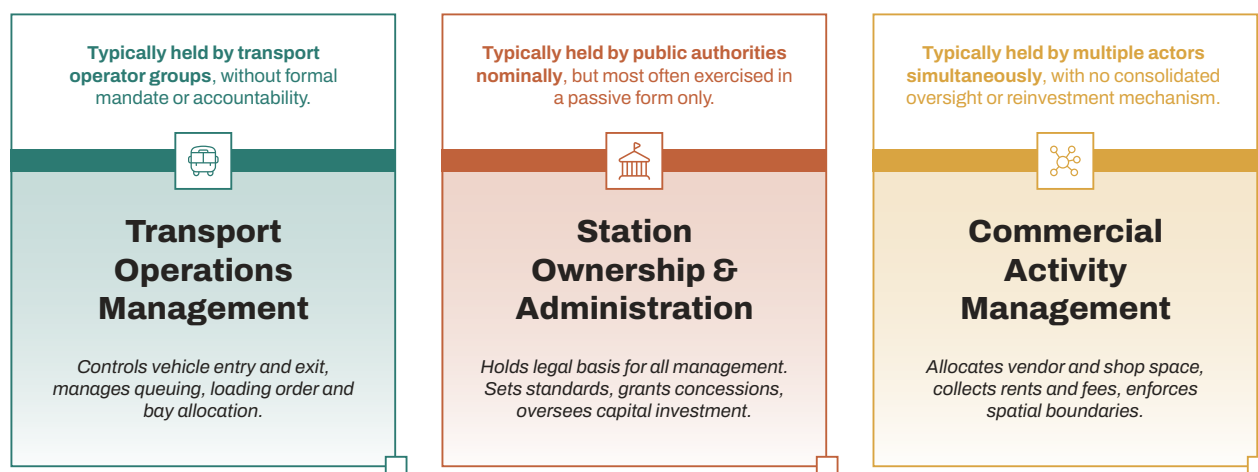
The ownership role also carries responsibility for major infrastructure investment: paving, drainage, shelters, lighting, sanitation, and the station's interface with the

surrounding road network. These are not operational tasks but capital decisions that require planning, procurement, and financing. In most of the case study stations, no entity has both the mandate and the financial means to perform this function. Public authorities lack the budget; private investors lack the mandate; operator associations lack both. The result is the chronic infrastructure deficit documented across the study—most visibly at Malhampsene, where an unpaved surface that floods in the rainy season has remained unaddressed for decades, and at Makumbusho, where broken lighting and potholes go unrepaired because the contract between the municipality and the private partner does not clearly assign responsibility for them.

Where ownership and administration are exercised actively—as at Baux Maraîchers, where CETUD defined the concession terms, selected the operator through a competitive process, and retains oversight responsibility—the outcomes are markedly better. The lesson is not that public authorities must operate stations directly, but that they must exercise their ownership role deliberately: defining the framework within which others operate, monitoring compliance, and retaining the institutional capacity to intervene when arrangements fail. The chapters that follow explore what this means in practice.

FIGURE 5

Schematic representation of the three main management roles to be fulfilled



3.3

COMPETITION AND SERVICE QUALITY

The stakeholder categories described in the previous sections do not operate in isolation. They compete for resources—space, revenue, and control—within a governance environment that rarely provides clear rules for resolving those competitions. Three categories of conflict occur consistently across the case studies.

Competition for space

Bus stations are physically constrained environments in which transport operations and commercial activity compete for the same finite footprint. Vehicles need circulation space, queuing lanes, and loading bays; traders need selling space close to passenger flows; and passengers need waiting areas and pedestrian access. In the absence of a management entity with authority over spatial allocation and the capacity to enforce it, these competing uses are negotiated informally—and the outcome tends to favor whoever is most persistently present.

At Zimpeto in Maputo, informal vendors have progressively occupied vehicle parking bays and station entrances, contributing to congestion severe enough to have caused accidents at the station's main access point. At Colobane in Dakar, mechanics occupy vehicle circulation areas to service vehicles in situ, blocking access for arriving and departing buses. At Djéni Kobénan in Abidjan, minibuses park on the roadside kerb for lack of space within the station, forcing pedestrians into the path of moving traffic. In each case, the root cause is the same: no entity holds both the authority to allocate space and the operational capacity to enforce spatial boundaries consistently.

The spatial conflict also operates at a slower timescale. Over months and years, commercial encroachment gradually erodes transport space in stations without active management. Once informal spatial claims are established—a vendor occupying a bay, a mechanic working in a circulation lane—they are difficult to reverse without confrontation. The practical implication is that spatial conflicts, left unresolved, are self-reinforcing: the longer a management vacuum persists, the harder it becomes to fill.

Competition for revenue

Financial flows at bus stations are contested at every level. Transport fares, commercial rents, parking charges, and informal levies are collected by multiple actors simultaneously—operator associations, municipal agents, private managers, and

informal collectors—with limited transparency and no consolidation. At Zimpeto, the municipal police collect a fee from vehicles until 10:00 AM; the transport associations collect a separate, higher fee for the remainder of the day. Both fees are paid by the same vehicles; neither is reinvested in station maintenance.

This fragmentation is not simply inefficient—it is also self-perpetuating. Each entity that collects revenue has an interest in preserving its share of the income stream. Reforming financial arrangements requires displacing established interests, which generates resistance. The station manager role is, as the background research for this report puts it, “highly sensitive” precisely because it sits at the nexus of financial flows. Whoever controls access to the station controls revenue collection, which is why operator associations defend their management role with particular tenacity and why transitions toward professional management tend to provoke conflict.

At Colobane, the station manager holds a contract with one municipality—chosen deliberately over CETUD, whose oversight would have been more constraining—and collects fees independently of the other municipality that shares jurisdiction. The arrangement was designed to maximize the manager's income and autonomy, not to serve the station's users or the public authority's interests. It persists because each party extracts sufficient benefit from the current arrangement to avoid the cost of changing it.

Passengers as indirect users

The most structurally embedded governance challenge concerns passengers. As the ultimate beneficiaries of station services and the source of virtually all revenue flows—through fares and commercial spending—passengers are the economic foundation of the entire station ecosystem. Yet they are also its most indirect users: operators and vehicles are the primary direct users of station infrastructure, generating measurable throughput and paying fees that make their presence legible to managers. Passengers, by contrast, experience the station but leave no auditable trace in management accounts. This is not a conflict of interests—passengers, operators, and public authorities all nominally want well-functioning stations. The problem is structural: no governance mechanism translates passenger experience into management incentives or penalties.

The consequences are visible across the case studies. Lighting is broken at Makumbusho and goes unrepaired because neither the municipality nor the private operator accepts responsibility for the cost—a failure that affects passenger safety but imposes no financial penalty on either party. At Djéni Kobénan, some vehicles bypass the station entirely during peak hours to avoid congestion, forcing passengers to board from the roadside. At most stations, sanitation facilities are inadequate, waiting

areas are nonexistent, and passenger information is absent. These are not marginal concerns: they determine whether a station functions as a public service or merely as a vehicle management facility.

The incentive structure of current management arrangements offers no mechanism for correcting this imbalance. Operator associations are accountable to their members, not to passengers. Private investors are accountable to their financial returns, not to service quality. Public authorities, who are in principle accountable to citizens, have in most cases withdrawn from active management. Until governance arrangements create a direct link between management incentives and passenger outcomes—through contractual performance standards, user feedback mechanisms, or regulatory enforcement—passengers will remain the station's most important and least powerful stakeholder.



Passengers
and vendors
at Magufuri station
in Dar es Salaam

©
Transitec
Consulting
Engineers



04

MANAGEMENT MODELS: FROM INFORMALITY TO PROFESSIONALIZATION

The diagnostic work of Chapter 3 reveals a consistent pattern: underperformance at African bus stations is less a technical problem than a governance one. The physical deficiencies, financial leakage, and operational disorder documented across the case studies are symptoms of poorly defined institutional

arrangements—unclear role assignment, absent oversight, and misaligned incentives. This chapter turns from diagnosis to analysis, asking what management models exist, what alternatives are available, and under what conditions transitions between them are feasible.



4.1

THE SPECTRUM OF CURRENT MODELS

The eight case study stations do not represent eight distinct management models. They cluster around four recognizable arrangements that together describe a spectrum from entirely informal to formally organized management. Understanding where a station sits on this spectrum—and why—is the starting point for any reform process.

Model 1: Transport operator-led management

At the informal end of the spectrum, stations are managed entirely by informal transport operator associations, with no meaningful public authority involvement. Malhampsene in Maputo is the clearest example: associations organize vehicle access and queuing, collect daily fees from drivers, and perform whatever maintenance occurs—all without a mandate, a contract, or any oversight. The station has no legal boundary, no formal infrastructure, and no financial relationship with the municipality. It functions because operators need it to, and it is managed exclusively in their interest.



Taxis parked during the off-peak period in Dakar

The financial picture at Malhampsene illustrates both the economic activity happening at the station and the governance failure that surrounds it. Daily farebox revenues generated by operators using the station are estimated at US\$4,040—a significant volume of economic activity flowing through a single node. Parking fees collected by associations amount to approximately US\$240 per day; commercial revenues from vendors add a further US\$510. None of this flows to the municipality. None is reinvested in infrastructure. The station generates substantial economic activity from which only two parties benefit: operators and informal traders.

This model is more common across Sub-Saharan Africa than the literature acknowledges. It emerges wherever public authorities are absent—whether through indifference, incapacity, or the simple fact that the station was never formally constituted. Its defining characteristic is that management authority derives not from any legal instrument but from physical control over station access: the association or union that controls the gate controls the station. This produces a stable but self-limiting arrangement—the station functions at a basic level, but there is no mechanism for improvement, no reinvestment, and no accountability to users.

Model 2:

Loose management with limited public presence

The second model involves some degree of public authority involvement—a municipal permit, a management contract with one of several jurisdictions, or nominal oversight by a transport authority—without that involvement translating into effective governance. Colobane in Dakar and Djéni Kobénan in Abidjan represent this model.

At Colobane, a station manager holds a contract with one of two municipalities bordering the station—the Gueule Tapée *commune*—while the neighboring HLM municipality⁸ has no contractual relationship with any station manager, and CETUD's oversight role is nominal. Daily vehicle entries total approximately 1,600, including Ndiaga Ndiaye paratransit vehicles, the Association for the Financing of Urban Transport Professionals (AFTU) mid-size buses, taxis, and Dakar Dem Dikk formal bus services, generating estimated daily transport fees of US\$1,098. Professional bodies and unions jointly collect approximately US\$401,000 per year from station operations—revenues that flow to their members rather than to maintenance or infrastructure. The station's position as an intermodal hub connecting paratransit with the regional rail network is undermined daily by congestion that no entity is mandated to resolve.

8. HLM is the name of a *commune* within the Dakar department (formerly a *commune d'arrondissement*). The name derives from the subsidized social housing development (*Habitations à Loyer Modéré* - HLM) built in the area during the 1950s and 1960s; the housing designation subsequently became the informal and then official toponym for the district. It should not be read as a generic reference to social housing tenure.

At Djéni Kobénan in Abidjan, the station occupies 0.4 hectares on land whose ownership is legally ambiguous—part private, part public road reserve—and handles approximately 905 vehicle entries per day, the lowest traffic volume in the study. The manager, an individual with links to one of the transport unions, charges daily fees to vehicles and vendors under a verbal arrangement with the municipality. Daily transport income is estimated at US\$427. The municipality sends a daily field team to manage vehicle circulation but exercises no oversight over fee collection or infrastructure. Vehicles regularly bypass the station during peak hours to avoid congestion on the adjacent interchange, forcing passengers to board from the roadside.

What distinguishes Model 2 from Model 1 is not the quality of governance but its form: there is a nominal public framework, but it is too fragmented, too partial, or too poorly enforced to constitute real oversight. The practical consequences are similar—no reinvestment, no accountability, contested revenues—with the addition of jurisdictional complexity that makes reform harder. Multiple actors each hold a piece of the governance picture; none holds enough to act decisively.

Model 3: **Partially organized management**

The third model involves a meaningful—if incomplete—public institutional presence. At least one management role has been assigned to a defined entity with a formal mandate: a public company manages the infrastructure, a national agency collects fees, or a transport authority exercises regulatory oversight. But the three management roles identified in Chapter 3—transport operations, commercial management, and station ownership and administration—remain divided among different actors without a coordinating framework.

Zimpeto in Maputo illustrates this fragmentation in detail. The station was built by the municipal company EMME as part of the 2011 African Olympic Games infrastructure program; demand exceeded its design capacity within five years. Today, two separate fees are collected from the same vehicles each day: the municipal police collect 20 meticaïs (approximately US\$0.44) per vehicle until 10am, passing those revenues to EMME; operator associations then collect a separate fee of 50 meticaïs (approximately US\$1.09) per vehicle for the remainder of the day. The total daily transport income generated is estimated at US\$1,346—of which US\$383 flows to EMME through the municipal police, and US\$963 flows to operator associations. Neither stream is earmarked for station maintenance or investment. With 155 commercial businesses operating within the station, 61 percent of them street vendors whose progressive encroachment on vehicle circulation areas has contributed to accidents at the station's main access point, the spatial conflict between transport and commercial uses remains

unresolved. The arrangement is stable because it distributes revenues in a way that satisfies all collecting parties—but it allocates responsibility for maintenance to no one.

Mbezi in Dar es Salaam presents a different version of Model 3. Managed by TANROADS, it has a formally public character that is unusual among the case study stations, and it shows: the upper level, connected to the BRT system operated by DART, is paved, structured, and maintained to a noticeably higher standard than most stations in the study. Daily vehicle entries total approximately 1,400 daladalas, alongside intercity buses using the wider facility. Parking fees of 1,000 Tanzanian shillings per day are collected by the station manager, generating approximately US\$40 in daily transport income—a figure that reflects the low fee level rather than low traffic volumes. The lower level of the station, serving local paratransit routes under less systematic management, receives less investment. The station illustrates both the potential of active public management and its limits: TANROADS brings resources and technical capacity, but its mandate as a roads agency does not naturally extend to the operational demands of a busy urban paratransit station.

Model 3 stations perform better on average than Models 1 and 2: they are more likely to be paved, more likely to have defined vehicle bays, and more likely to generate revenues that at least partially reach a public authority. But partial formalization without a coordinating governance framework generates its own dysfunctions. The more actors hold defined but partial roles, the more negotiation is required to resolve conflicts—and the more opportunities exist for each actor to evade responsibility by pointing to another.

Model 4: **Organized management with formal private-sector involvement**

At the professionalized end of the spectrum, stations operate under formal contractual arrangements between a public authority and a private manager, with defined roles, revenue-sharing arrangements, and—at least in principle—enforceable performance standards. Baux Maraîchers in Dakar, Makumbusho in Dar es Salaam, and Yaya Fofana in Abidjan represent this model, though with considerably different outcomes.

Baux Maraîchers is the study's clearest example of Model 4 functioning as intended. CETUD granted a ten-year concession to a private company through a competitive process, with the concessionaire assuming responsibility for all transport and commercial operations under a unified management structure. The station spans 10.5 hectares, handles approximately 1,400 vehicle entries per day—primarily interurban and international services—and generates daily transport income of US\$7,902, by far the highest of any station in the study. Its 101 commercial businesses, 98 percent of them in fixed built premises, generate additional income that the concessionaire

reinvests in maintenance under its contractual obligations. The station is organized by vehicle type into distinct zones, is visibly maintained, and operates with a degree of predictability that stands out in the regional context. The key to its performance is not the involvement of private capital per se, but the institutional clarity of the arrangement: one entity is responsible for everything, accountable to CETUD, and financially incentivized to maintain quality.

Makumbusho and Yaya Fofana demonstrate that Model 4 does not automatically deliver these outcomes. At Makumbusho, which handles approximately 2,425 vehicle entries per day—the highest of any station in the study—operators pay a daily parking fee of 1,000 Tanzanian shillings (approximately US\$0.37), generating total daily parking income of around US\$154, split 75/25 between the municipality and Eastern



Passengers and vehicles waiting at Mbezi station during the off-peak period

Capital Ltd. Union and association fees collected separately by the transport operator union add a further US\$66 per day. Commercial rents from the four-story building are collected exclusively by Eastern Capital Ltd., which retains 85 percent of net profits; the actual figures were not made available for this study. The revenue picture is therefore incomplete, but sufficient to confirm that Makumbusho generates substantial income—distributed across multiple actors with no reinvestment mechanism and no consolidated oversight. At Yaya Fofana, which operates on just 0.5 hectares and handles approximately 1,315 vehicles per day, a centralized ticketing system—unusual in the regional context—generates daily transport income of US\$349. The station is well-organized by local standards, though its commercial performance has fallen short of the developer’s initial projections.

The spectrum from Model 1 to Model 4 is not a linear progression toward an optimal endpoint. Each model represents a response to a specific institutional context, and each has failure modes as instructive as its successes. The relevant question for a decision-maker is not which model is best in the abstract, but which is appropriate for a given context—and what transition pathway from the current arrangement to a better one is feasible. Section 4.3 and Chapter 5 address these questions directly. Section 4.2 first presents the full range of institutional alternatives available to public authorities seeking to improve station management.

TABLE 4

Spectrum of current management models across case study stations

Model	Example stations	Key feature	Public sector involvement	Institutionalized private sector involvement
1. Operator-led	Malhampsene [Maputo]	No public authority involvement. Associations control access and collect all fees.	None	None
2. Loose public presence	Colobane [Dakar] Djéni Kobénan [Abidjan]	Nominal public framework, too fragmented to constitute real oversight.	Partial with fee collection only	None
3. Partial formalization	Zimpeto [Maputo] Mbezi [Dar es Salaam]	At least one role formally assigned, but management remains divided with no coordinating framework.	Active but incomplete	None
4. Formal private involvement	Baux Maraîchers [Dakar] Makumbusho [Dar es Salaam] Yaya Fofana [Abidjan]	Formal contract between public authority and private manager. Outcome depends on contract quality and enforcement capacity.	Owner and oversight authority	Operator under concession or PPP

4.2

ALTERNATIVE INSTITUTIONAL ARRANGEMENTS

The previous subsection was descriptive: it mapped what exists in practice across the eight case study stations, identifying four recognizable management models along a spectrum of public engagement and private-sector involvement. This section is forward looking: it sets out four institutional arrangements that public authorities can actively pursue as reform pathways, grounded in the case study evidence but not limited to it. The four alternative arrangements presented here are designed to be realistic next steps from the models observed in practice, not abstract ideals.

Two axes define the space of alternatives. The first is the degree of public engagement: how actively does the public authority define, monitor, and enforce the management framework? The second is the degree of contractualization of private actors' roles: are private parties involved as informal operators, contracted service providers, or investors with formal financial exposure? The four arrangements presented below represent distinct positions on these two axes. Each arrangement has conditions under which it performs well and conditions under which it does not. The task of matching an arrangement to a specific context is addressed in section 4.3 and developed further in Chapter 5.

A prior condition applies to all four arrangements: the legal and regulatory framework must be adequate to support them. Legal frameworks governing station management in Sub-Saharan Africa are frequently ambiguous, unspecific, or silent on which tier of government holds the mandate to develop, operate, or delegate station management. In Abidjan, there is no legal definition of a public transport station—its required size, its necessary facilities, or the conditions under which it can be privately operated. In Maputo and Dar es Salaam, the division of responsibility between national road agencies, metropolitan transport authorities, and municipal governments is undefined at station level. This legal ambiguity is the reason that informal actors are able to occupy public land, collect revenues from public infrastructure, and resist reform with limited risk of legal challenge. Any reform process must begin by clarifying the institutional mandate—identifying which public entity has the legal authority and the operational responsibility for station management—before the choice of arrangement can be meaningfully made.

Arrangement A:

Consolidated public management

In this arrangement, a public authority—a municipality, a transport authority, or a dedicated public company—assumes direct and unified responsibility for all three management roles: transport operations, commercial management, and station ownership and administration. The private sector is present as tenants and service users, not as managers or investors. The public entity collects revenues, maintains infrastructure, and enforces operational standards.

This arrangement is appropriate where commercial revenues are insufficient to attract private investment, where the station has high strategic importance for the public transport network, or where the institutional environment makes formal contracting with private partners impractical. It is also the appropriate starting point for a station currently in Model 1 or Model 2, where a period of public consolidation—establishing land tenure, formalizing revenue collection, defining operational standards—is needed before private-sector involvement becomes feasible.

Mbezi in Dar es Salaam approximates this model under TANROADS management, with results that are above average for the regional context but constrained by the mismatch between a road agency's mandate and the day-to-day operational demands of a busy urban station. The model performs best where the public entity has a specific mandate for station management, adequate technical capacity, and a ring-fenced revenue mechanism that allows reinvestment. Where these conditions are absent—as in most of the case study cities—direct public management tends to reproduce the passivity and fragmentation of the status quo rather than improving on it.

The key implication for Sub-Saharan African cities is that Arrangement A is more demanding than it appears. It does not simply mean that the municipality takes over—it means that a specifically mandated and adequately resourced public entity assumes unified management responsibility, develops the technical capacity to perform it, and establishes the financial mechanisms to sustain it. In cities where that institutional capacity does not yet exist, Arrangement A may be an aspiration rather than an immediate option, and the relevant question is what preconditions need to be built toward it. These preconditions—clear land tenure, defined institutional mandate, ring-fenced revenues, and basic contract management capacity—are not specific to Arrangement A; they are the foundation on which any of the four arrangements must rest.

BOX 2

Rabat Bus Station, Morocco

[Arrangement A: Consolidated Public Management]

The Rabat bus station in Morocco offers a more fully realized version of this arrangement. Completed in 2022 as part of an urban modernization program, it replaced the old Kamra terminal—a congested, informally managed facility that had long been a source of city-center traffic dysfunction and passenger discomfort. The new station covers eight hectares, accommodates up to 10,000 passengers per day across 46 bus platforms, and integrates a shopping center with 40 commercial units and a dedicated parking facility. Advanced traffic management systems regulate vehicle flow across the site, a function that at the old Kamra terminal had been left to informal negotiation between drivers and associations. The station is managed by a dedicated local development company—80 percent owned by the Municipality of Rabat and 20 percent by the national logistics company SNTL—whose mandate is specifically station management rather than general municipal services. Revenues from bus operators, vendors, and commercial tenants are consolidated under a single manager, maintenance obligations are defined and monitored, and commercial income is available for reinvestment in operations rather than absorbed into a general municipal budget. Financing was structured across three public sources—the municipality, SNTL, and the regional development company Rabat Région Aménagement—a model that distributed fiscal pressure while keeping ownership and governance firmly public.

FIGURE 6

Rendering of the new Rabat interurban and regional public transport station



The institutional design—a purpose-built public company with a specific mandate, rather than a general-purpose municipality or national road agency—is the critical factor. It resolves the mandate gap that undermines public management in most of the case study cities, and does so without requiring private investment. The model is nonetheless demanding: it presupposes a specifically mandated and adequately resourced public entity with the technical and administrative capacity to perform unified management. Those conditions are not easily replicated, and the Rabat experience should be read as a demonstration of what consolidated public management can achieve when properly structured—not as a template that can be transferred without equivalent institutional investment.

Arrangement B:

Public ownership with private operations management

In this arrangement, the public authority retains ownership of the station and defines the governance framework—operational standards, fee structures, performance requirements—but contracts the management of transport operations, commercial activity, or both to a private operator under a formal agreement. The public sector finances construction and major infrastructure investment; the private operator assumes day-to-day management risk and operational responsibility.

Baux Maraîchers, described in section 4.1, is the study's clearest example of Arrangement B functioning as intended—a formal concession in which unified management responsibility, systematized revenue collection, and reinvestment obligations are held by a single private operator accountable to the public authority. Its defining advantage is the alignment of financial incentives with management responsibility: the private operator's revenue depends on the station performing well, which creates a direct incentive to maintain infrastructure, manage vehicle flows efficiently, and develop commercial activity.

The CETUD concession at Baux Maraîchers succeeds in part because it assigns all three management roles to a single operator under a unified framework, and retains the transport authority's power to dismiss and replace the concessionaire based on specific performance targets. This oversight capacity is the mechanism through which public objectives are enforced in a privately operated facility. Signing a contract is not sufficient; the public authority must have the institutional capacity to monitor it, to identify non-compliance, and to enforce penalties or terminate the relationship when performance standards are not met. Without this capacity, Arrangement B risks becoming a revenue transfer to a private operator with no accountability for service quality—which is precisely what the Makumbusho experience illustrates in a different contractual form.

Key contractual provisions under Arrangement B include: clear assignment of all three management roles to a single operator; defined maintenance obligations with specified response times—a contractual requirement that broken lighting or drainage failures be repaired within 24 hours with financial penalties for non-compliance ; a revenue-sharing or concession fee formula that aligns the private operator's financial incentive with station performance; performance indicators covering transport operations, commercial activity, and infrastructure standards; and a regular audit or reporting mechanism that gives the public authority real-time visibility over financial flows and operational outcomes. Each of these provisions addresses a specific failure mode documented across the case studies—the broken lights at Makumbusho, the revenue leakage at Colobane, the spatial encroachment at Zimpeto—and their inclusion in any contract under Arrangement B is a requirement.

BOX 3

Pierre Plantée Station, Vitrolles, France

[Arrangement B: Management Contract]

Internationally, the Pierre Plantée multimodal station in Vitrolles, France, offers an instructive variant of Arrangement B. Owned by the metropolitan authority (Métropole Aix-Marseille-Provence), it is managed through a nine-year public service delegation contract with Transdev (a transport operator), which subcontracts daily management to a specialized operator. The station itself is modest in scale—ten bus bays, a taxi area, a bicycle shelter, and a mobility agency—but the contractual structure it demonstrates has broad relevance. The private partner receives a fixed operating fee from the public authority, shielding it from revenue risk, while ticket and ancillary revenues are remitted to the authority. This management contract sub-option, as opposed to a full concession, is more appropriate in lower-revenue environments where private partners are unlikely to accept full revenue risk. The choice between a management contract and a concession should be driven by the station's demonstrated revenue-generating capacity: concessions are appropriate where the operator can sustain a return from collected revenues; management contracts are more appropriate where commercial revenues are uncertain or insufficient—which describes the majority of stations in the African cities covered by this study.

FIGURE 7

Photo of the Vitrolles Pierre Plantée Multimodal Station



source: marseille.aeroport.fr

Arrangement C:

Shared investment with private construction and operations

In this arrangement, public and private parties co-invest in station infrastructure, with the private partner taking the lead on construction and assuming responsibility for operations over a defined period—typically through a BOT or similar structure. The public authority contributes land, permitting, and possibly a capital subsidy; the private partner contributes construction financing and management capacity and recoups its investment through revenues over the contract period.

Yaya Fofana in Abidjan approximates this model, and its experience illustrates the principal risk of Arrangement C: that private investors whose return depends on commercial revenues will design and manage the station primarily as a commercial asset rather than as a transport facility. Where commercial revenues are sufficient to drive a positive return, this misalignment can be managed through contract terms that impose transport performance obligations on the private operator alongside commercial rights. Where commercial revenues are uncertain—as proved to be the case at Yaya Fofana, where upper-floor commercial space remains largely vacant—the private operator finds itself financially exposed, and transport management obligations become an additional burden rather than a priority.

A practical challenge with Arrangement C is identifying private partners with both the capital to finance construction and the operational competence to manage a bus station effectively. In the African context, investors with access to real estate finance tend to be more interested in the commercial building than in the transport facility—producing the Yaya Fofana outcome, where the developer's primary competence is in construction and commercial leasing rather than station operations. Structuring the concession so that transport performance obligations are legally binding, financially penalized, and actively monitored is more demanding under Arrangement C than under Arrangement B, precisely because the private partner has made a capital investment that gives it greater leverage in any renegotiation.

A variant of Arrangement C with particular relevance to the African context is the grouping of multiple stations under a single private operator. Managing stations individually makes it difficult to attract professional private operators, who need sufficient scale to justify the overhead costs of professional management: accounting, legal compliance, maintenance staffing, and operational monitoring. A single station generating moderate daily revenues may not support a professional manager on its own; ten stations with comparable revenues under a single concession may do so comfortably. This approach was discussed in the context of a project involving 32 new bus stations in Abidjan, where the recommendation was to structure the concession into three lots of approximately ten stations each—giving each concessionaire

BOX 4

Koudougou Bus Station, Burkina Faso

[Arrangement C: Shared Investment]

The Koudougou station in Burkina Faso illustrates both the potential and the risks of Arrangement C. The station was developed through a BOOT (Build, Own, Operate, Transfer) model in which major private transport operators invested in their own facilities within the station perimeter. Critically, this outcome emerged more by circumstance than by deliberate design: the PPP framework was, in the words of one assessment, “set up by coincidence,” without a clearly articulated risk-sharing framework, a long-term viability assessment, or a broad stakeholder consultation process. Governance is split between the Autonomous Board for the Management of Market Infrastructures of Burkina Faso (RAGIM), responsible for collecting parking and rental fees—and a management committee composed of transport union delegates that receives 20 percent of RAGIM’s collected revenues monthly. The relationship between the two bodies has been tense, a direct consequence of insufficient upfront consultation, and service quality has reflected these governance shortcomings: lighting is inadequate, dust management is poor, and security concerns remain unresolved.

FIGURE 8

Photo of the Koudougou bus station in Burkina Faso



Yet despite these shortcomings, the Koudougou arrangement has features conspicuously absent from most of the African stations in this study: an explicit revenue-sharing formula, a defined reinvestment mechanism, and formal representation of transport operators in governance. The failures at Koudougou are largely failures of process—of preparation, consultation, and design—not failures of the underlying model. The lesson for other cities is not to avoid this arrangement, but to invest in the stakeholder alignment and institutional design that Koudougou lacked.

sufficient scale to mutualize management costs while allowing competition between operators at the portfolio level. Implementing this model requires a metropolitan transport authority with the institutional capacity to structure and manage a portfolio-level concession—a significant precondition, but also the kind of institutional development that the concession design process itself can help drive. The Economic Interest Grouping (GIE) model used for paratransit operator corporatization in Senegal offers an analogy: grouping small operators into formal entities of sufficient scale to access financing, management systems, and professional services.

Arrangement D: **Full private financing, construction, and operations**

At the far end of the spectrum, a private entity finances, builds, and operates the station with minimal public investment, typically under a long-term BOT concession that eventually transfers the asset to the public authority. The public role is primarily regulatory: granting the concession, setting minimum performance standards, and monitoring compliance. The private partner recoups its investment and generates a return entirely from station revenues—transport fees, commercial rents, parking, and ancillary services. This arrangement is appropriate only for stations with very high and demonstrable commercial revenue potential, sufficient to attract private financing without a public subsidy and to sustain a private return over the concession period.

In the Sub-Saharan African context, stations meeting the threshold for Arrangement D are rare. High-traffic, commercially strategic stations in major cities—Baux Maraîchers being the closest approximation in the study, though it operates under Arrangement B rather than D—represent the upper bound of what the current market can sustain without public financial support. Attempting to apply Arrangement D in lower-revenue environments, where private investors must be incentivized with public subsidies, land grants, or non-transport revenue streams to make the numbers work, tends to produce arrangements that are privately profitable but publicly costly, with the transport function subordinated to the commercial logic of the investor.

The broader lesson from the case studies is that the degree of private financial exposure in a station management arrangement should be calibrated to the station's genuine, verified revenue-generating capacity—not to the ambitions of a development proposal or the political appeal of a private-sector solution. Overstretching toward Arrangement D in an environment suited to Arrangement B produces the Makumbusho outcome in a more expensive form: a station that generates private returns while its transport function deteriorates, with the public authority lacking the contractual leverage to demand otherwise.

BOX 5

Avenida de América Interchange Station, Madrid, Spain

[Arrangement D: Full Private Financing]

The Avenida de América interchange in Madrid represents Arrangement D at its most developed. A private concessionaire invested USD 27.56 million upfront under a 25-year BOT contract to build an underground interchange across four levels, with 37 bus bays and 40,000 square meters of floor space directly connected to four metro lines. Costs are recovered from a diversified revenue base—intercity bus operator fees, long-distance user charges, commercial leases, and parking revenues—and demand increased by 30 percent within the first two years as reduced transfer times attracted new users. Crucially, the arrangement includes a guaranteed minimum revenue provision tied to passenger numbers, a public backstop that proved necessary in practice: in 2017, when passenger numbers reached only 70 percent of the projected target, the public authority was required to compensate the concessionaire for the shortfall.

FIGURE 9

Photo of the Avenida de America interchange station in Madrid



That episode deserves emphasis. Even in Madrid—with a large, commercially proven station, a sophisticated regulatory environment, and strong contract management capacity on the public side—the private sector required an explicit public risk-sharing commitment to make the investment viable. That condition should be the starting point for any consideration of Arrangement D in African cities, where revenue bases are smaller, regulatory frameworks are less developed, and the institutional capacity to structure, monitor, and honor a minimum revenue guarantee over a 25-year horizon is rarely present.

Choosing between these four arrangements is not a matter of preference or political ambition — it requires a structured assessment of the station's current institutional context, its revenue base, and the capacity of the public authority to define and enforce a management framework. The nine-step assessment tool presented in chapter 5 is designed precisely for this purpose. It guides a decision-maker through the questions that determine which arrangement is appropriate for a given context, what preconditions must be in place before a transition can succeed, and how the gap between the current situation and the target arrangement should be managed. The four arrangements presented above provide the destination; the framework provides the route.

TABLE 5

Alternative institutional arrangements for bus station management

Arrangement	Private involvement	Appropriate when	Key risk	Examples
A. Consolidated public management	None	Revenue too low to attract private investment; public consolidation needed first; high strategic importance	Public entity lacks mandate or capacity; tends to reproduce passivity of status quo	Mbezi [Dar es Salaam] Rabat bus station [Morocco]
B. Public ownership, private operations	Moderate; private operator manages day-to-day under contract	Sufficient revenue to sustain a private return; public authority has oversight capacity	Contract design inadequate or enforcement too weak; private operator gains autonomy without accountability	Baux Maraichers [Dakar] Makumbusho [Dar es Salaam]
C. Shared investment, private construction & operations	High; private partner co-invests and operates under BOT structure	High commercial development potential; public authority lacks capital for construction	Private investor prioritizes commercial returns over transport function; commercial revenues may be overestimated	Yaya Fofana [Abidjan] Koudougou [Burkina Faso]
D. Full private financing & operations	Full; private entity finances, builds and operates	Very high and demonstrable commercial revenue potential; no public subsidy needed	Threshold rarely met in African cities; transport function risks being subordinated to investor logic	Avenida de América [Madrid]

4.3

CONDITIONS FOR SUCCESSFUL TRANSITION

The four alternative arrangements presented in section 4.2 describe what improved station management could look like. This section addresses a prior question: under what conditions is a transition from current arrangements to better ones actually feasible? The case studies and the background research for this report converge on a set of preconditions, sequencing principles, and political economy considerations that decision-makers need to address before selecting a target arrangement and committing to a reform pathway.

Preconditions that must be in place

Three foundational conditions are required for any reform process to succeed, regardless of the target arrangement:

- The first precondition is clarity of land tenure. Stations built on land whose ownership is contested, ambiguous, or legally unresolved cannot be reformed—they cannot attract private investment, sustain a concession, or support a capital improvement program because the legal basis for any of those actions is absent. Djéni Kobénan in Abidjan, built partly on public road reserve occupied without authorization, illustrates the problem: no public authority can grant a formal concession over land it does not legally control, and no private investor will commit capital to a facility on land whose title is disputed. Establishing secure land tenure—through formal boundary demarcation, municipal decree, or resolution of competing claims—is the necessary first step for any station where the current situation is legally ambiguous. This is not a technical task but a political and legal one, often requiring negotiation with established actors who benefit from the current ambiguity.
- The second precondition is a clear and specific institutional mandate. Which public entity—municipality, transport authority, or national agency—is legally responsible for station management? In most of the case study cities, this question has no clear answer. Legal frameworks governing station management are frequently ambiguous or silent on jurisdiction, creating the conditions under which no entity assumes responsibility and informal actors fill the vacuum. Reform requires, as a starting point, a formal designation of the responsible public authority—a municipal decree, a ministerial instruction, or a modification to the transport authority's mandate—that gives one entity the legal standing to act. Without this, any investment in infrastructure or governance is exposed to challenge by other actors claiming competing authority.

- The third precondition is basic contract management capacity. Arrangements B, C, and D all require the public authority to negotiate, monitor, and enforce contracts with private partners. This is a specific institutional skill—distinct from the technical skills of transport planning or the administrative functions of municipal government—and it is frequently absent. Signing a contract is not sufficient; the public authority must be able to verify that contractual obligations are being met, identify non-compliance, and enforce penalties or terminate the relationship when performance standards are not maintained. Where this capacity does not exist, private-sector involvement tends to produce arrangements that serve the private partner’s interests at the expense of public objectives—as at Makumbusho, where the municipality’s inability to enforce maintenance obligations gave the private agent effective operational autonomy over a publicly owned facility.

FIGURE 10

Three preconditions to reforming management models



The sequencing of reform

Even where preconditions are in place, transitions between management models are more likely to succeed if they are sequenced incrementally rather than attempted in a single step. The distance between Model 1—entirely informal, operator-led—and Arrangement B—formal concession with private operations management—is large. Attempting to bridge it directly, without an intermediate period of public consolidation, tends to fail. Operator associations that have managed a station informally for decades will not accept displacement by a private concessionaire without resistance that can derail the reform process entirely. A more realistic sequencing moves in stages.

At a station currently in Model 1 or Model 2, the first stage is public consolidation: the responsible authority asserts its institutional mandate, regularizes land tenure, formalizes revenue collection, and invests in basic infrastructure—paving, drainage, lighting—sufficient to demonstrate public engagement and to generate the revenue data on which a future concession can be based. This stage does not require private-sector involvement; it requires political will and a modest public investment that establishes the enabling environment for subsequent steps.

The second stage is the professionalization of at least one management role. Rather than attempting to restructure all three management roles simultaneously—transport operations, commercial management, and administration—a transitional arrangement might formalize commercial management first, appointing a professional manager for commercial spaces and establishing a transparent rent collection system, while retaining the existing transport management arrangement in the short term. This generates revenue, builds institutional experience with contract management, and demonstrates the financial benefits of formalization to skeptical stakeholders without triggering the full political economy challenge of displacing operator associations from the transport operations function.

The third stage is the progressive extension of that contractual framework to cover all three management roles—moving toward a unified management arrangement under Arrangement A or B, depending on the public authority's capacity and the station's commercial profile.

The case of Yaya Fofana in Abidjan illustrates a more compressed version of this sequencing. The municipality made a deliberate political decision to remove operator associations from management entirely, appointing a professional station manager by mayoral decree. Rather than displacing former association workers—the *gnambros* (informal union workers who had previously managed vehicle loading and passenger soliciting at ground level)—the municipality converted them into formal station employees, assigning them roles in security and fuel services. This approach managed the political economy challenge by giving potential opponents a direct financial stake in the new arrangement. It required sustained political commitment from the Mayor of Koumassi and direct intervention in stakeholder arrangements that had previously been self-organizing. It also depended on a specific enabling condition—a newly built station without entrenched informal governance—that is absent from most reform contexts. At existing stations with established operator arrangements, a more gradual approach is typically necessary.

The political economy of reform

The most technically well-designed reform will fail if it does not adequately address the interests of actors who benefit from current arrangements. Operator associations that currently control station access and revenue collection have a direct financial interest in resisting a shift toward professional management roles. Private individuals who occupy public land—as at Djéni Kobénan—have an interest in resisting formalization. Multiple public authorities collecting partial fees from the same station—as at Colobane—have an interest in preserving arrangements that each finds tolerable, even if none finds them optimal.



Passengers queuing
to board a bus at
Mbezi bus station
in Dar es Salaam

Two principles emerge from the case studies for managing this political economy. The first is that reform is more likely to succeed when it creates new stakeholders with a stake in the new arrangement rather than simply displacing existing ones. The Yaya Fofana approach—hiring former association members as employees—is one version of this. The Koudougou model—giving operator representatives formal membership of the station management committee—is another. These approaches do not eliminate the tension between old and new arrangements, but they reduce the incentive for active resistance.

The second principle is that targeted, visible infrastructure investment can be an important instrument through which a public authority establishes its legitimacy over a station before attempting broader governance reform. In contexts where the public sector has been largely absent—as a passive landowner rather than an active manager—operators and commercial actors have little reason to accept a new governance framework imposed without prior demonstration of public commitment. A modest but tangible investment in paving, lighting, or sanitation asserts the authority's active presence and signals that it has both the will and the capacity to improve conditions. This legitimacy, once established, creates the political and institutional foundation for defining more robust governance arrangements—clarifying mandates, formalizing roles, and setting performance standards. Those arrangements are in turn the necessary precondition for larger-scale investment, such as the full construction or rehabilitation of a station and the contracting of all parties within it. The sequencing logic is therefore iterative: limited public investment establishes legitimacy, governance reform creates the framework, and larger investment follows—each cycle reinforcing the public authority's capacity and credibility to take on the next.

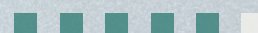
A final consideration is the scale of ambition relative to institutional capacity. The most common failure mode in the case studies is not that reform was attempted and defeated by opposition, but that formal arrangements—contracts, concessions, PPP agreements—were put in place without the institutional capacity to make them function. Makumbusho has a PPP contract; it lacks the contract management capacity to enforce it. Colobane has a station manager with a formal contract; the contract covers only one of two municipalities and does not define performance obligations. The lesson is consistent: a simpler arrangement that is well designed and actively monitored will outperform a sophisticated arrangement that is poorly enforced. Reform should be calibrated to the institutional capacity available, with more complex arrangements reserved for contexts where that capacity has been demonstrated rather than assumed. Chapter 5 provides a structured tool for navigating from that diagnosis to a specific reform decision.

05

A FRAMEWORK FOR SELECTING A MANAGEMENT MODEL

The preceding chapters have established two things. First, that the underperformance of African bus stations is primarily an institutional problem: the wrong actors hold the wrong roles, incentives are misaligned, and governance arrangements that have evolved informally are resistant to improvement from within. Second, that a structured set of alternative management arrangements exists — from consolidated public management to full private concession — each suited to a different institutional context, each with specific preconditions, and each representing a realistic reform pathway from one or more of the observed models described in section 4.1. The task for a decision-maker is to identify which arrangement is appropriate for their specific station, and to understand what it will take to get there.

This chapter provides decision-makers with a structured tool for navigating the space between these two points: a nine-step assessment framework that guides a public authority through the questions it needs to answer before selecting a target management arrangement and designing a transition pathway toward it. The framework does not prescribe an outcome—it does not tell a decision-maker which arrangement to choose. It ensures that the right questions are asked in the right order, that preconditions are evaluated before commitments are made, and that the gap between the current situation and the target arrangement is honestly assessed before a reform program is designed.



5.1

ASSESSING INSTITUTIONAL READINESS

The central premise of this report is that there is no universally optimal management model for bus stations. The right arrangement depends on a combination of factors—the station’s traffic volumes and commercial potential, the legal and regulatory environment, the capacity of the public authority to exercise oversight, the organizational maturity of transport operators, and the political conditions under which reform is attempted. These factors vary significantly across cities and even across stations within the same city. An arrangement that performs well at Baux Maraîchers in Dakar—a large, high-revenue station managed by a capable transport authority with a clear legal mandate—would not be appropriate for Malhampsene in Maputo, where land tenure is unresolved, the municipality is institutionally absent, and the revenue base is insufficient to sustain a private concessionaire.

The concept of institutional readiness captures this variation. A public authority’s readiness for a given management arrangement is determined by the extent to which the preconditions for that arrangement are in place—legal, financial, organizational, and political. Readiness is not binary. It exists on a spectrum, and a station that is not yet ready for Arrangement B—formal concession with private operations management—may be ready for a transitional step toward it, such as formalizing commercial management under a municipal contract or establishing a ring-fenced revenue account. The assessment framework presented in this chapter is designed to locate a station on that spectrum and identify the most appropriate next step, whether that is a direct transition to a target arrangement or a sequenced progression through intermediate stages.

The framework addresses eight dimensions of institutional readiness, which together determine both the ceiling of ambition—how far along the spectrum toward professionalization a given context can realistically reach—and the floor of feasibility—the minimum conditions that must be in place before any reform is attempted. These dimensions are not assessed in isolation: the result of each step informs the scope of the next, and the framework as a whole is designed to be applied as an integrated process rather than a checklist. A station that scores well on commercial potential but poorly on land tenure clarity is not a candidate for a formal concession, regardless of the financial case. A station managed by a public authority with no contract management capacity is not a candidate for a complex PPP arrangement, regardless of political will.

Three observations are relevant to how the framework should be applied in practice:

- The first observation is that the assessment process is inherently consultative. Each of the eight dimensions requires information that cannot be gathered from a desk review alone. Financial flow data requires engagement with associations and vendors who have every incentive to withhold information. Stakeholder interests and reform constraints can only be understood through direct conversation with the actors who hold them. Land tenure status requires legal review and often political clarification. The framework should be applied through a structured fieldwork process, with adequate time for stakeholder engagement at each step. Rushing the assessment—treating it as a procedural formality before a decision that has already been made—is the most common way in which reform processes are undermined before they begin.
- The second observation is that the framework should not be applied once and treated as definitive. Institutional readiness changes over time—political conditions shift, capacity is built, legal frameworks evolve, and financial flows respond to external pressures. An assessment conducted in 2025 may reach different conclusions from one conducted in 2027, after a new municipal administration has taken office or a national transport law has been amended. The framework is best understood as a recurring diagnostic tool rather than a one-time exercise—a basis for monitoring progress toward the preconditions for a target arrangement as well as for selecting that arrangement in the first place.
- The third observation concerns the role of external technical assistance. Many public authorities responsible for bus station management in Sub-Saharan Africa lack the internal capacity to apply a framework of this complexity without support. The institutional readiness assessment itself—let alone the design of a concession contract or a PPP structure—requires legal, financial, and operational expertise that municipal transport departments do not typically possess. Development partners and technical assistance providers have a critical role to play in supporting authorities through this process, not by applying the framework on their behalf, but by building the institutional knowledge and analytical capacity that allows authorities to apply it themselves over time. The most durable reforms documented in the case studies—the Baux Maraîchers concession in Dakar—were accompanied by sustained technical support from CETUD's institutional partners over a period of years. One-off assessments without follow-through rarely produce lasting change.

5.2

STEP-BY-STEP ASSESSMENT FRAMEWORK

The nine steps of the assessment framework are organized in a deliberate sequence. The first four steps are diagnostic: they establish the factual picture of the station's current situation—its infrastructure, its institutional arrangements, its financial flows, and the organizational capacity of its transport operators. Steps 5 and 6 address the enabling environment: the legal and regulatory framework within which reform must operate, and the land tenure situation that determines what kinds of intervention are legally possible. Steps 7 and 8 assess the station's future potential—its commercial development capacity and the public authority's capacity to oversee a reformed management arrangement. Step 9 synthesizes the findings of the preceding steps into a management model selection and a transition pathway.

The steps are described below with sufficient detail to guide a practical assessment. Each step includes the key questions that the assessment must answer, the information sources and methods most likely to yield reliable data, and the decision points that determine how the findings of that step shape subsequent ones.

Step 1: **Assess infrastructure conditions**

The first step is a systematic assessment of the station's physical infrastructure—not to produce a detailed engineering survey, but to establish a baseline picture of the infrastructure conditions that any management reform will need to address or build upon.

The key questions are: What is the current state of the station's physical infrastructure—paving, drainage, lighting, sanitation, shelters, and vehicle bays? Does the current layout support organized operations, or does the physical configuration itself generate congestion and spatial conflict? What is the quality of the interface between the station and the surrounding road network—are entry and exit points adequate for current vehicle volumes, and does the station generate congestion that spills into adjacent streets? Is existing infrastructure sufficient to support basic commercial activity, or would commercial development require significant capital investment?

Infrastructure assessment is typically conducted through direct observation during site visits, supplemented by vehicle and passenger counting at entry and exit points to establish volume data. The output should be a concise infrastructure diagnosis—

identifying the most critical deficiencies and estimating their impact on operational efficiency—rather than a comprehensive engineering report. The purpose of Step 1 is to inform the assessment of commercial potential in Step 7 and the public authority's investment obligations in Step 8, not to produce a capital works plan.

A key decision point emerges from the infrastructure assessment: is the station's physical configuration a binding constraint on reform, or a manageable challenge? Some stations—Djéni Kobénan in Abidjan, for example—are so constrained by their physical footprint and their road access that no governance reform can deliver meaningful improvement without prior or concurrent physical investment. In these cases, the infrastructure assessment may determine the minimum public investment required before a reformed management arrangement becomes viable. Other stations—Malhampsene in Maputo—have physical deficiencies that are serious but addressable through incremental investment once governance arrangements are clarified. Distinguishing between these two situations is the primary output of Step 1.

Step 2:

Assess stakeholder roles and current institutional arrangements

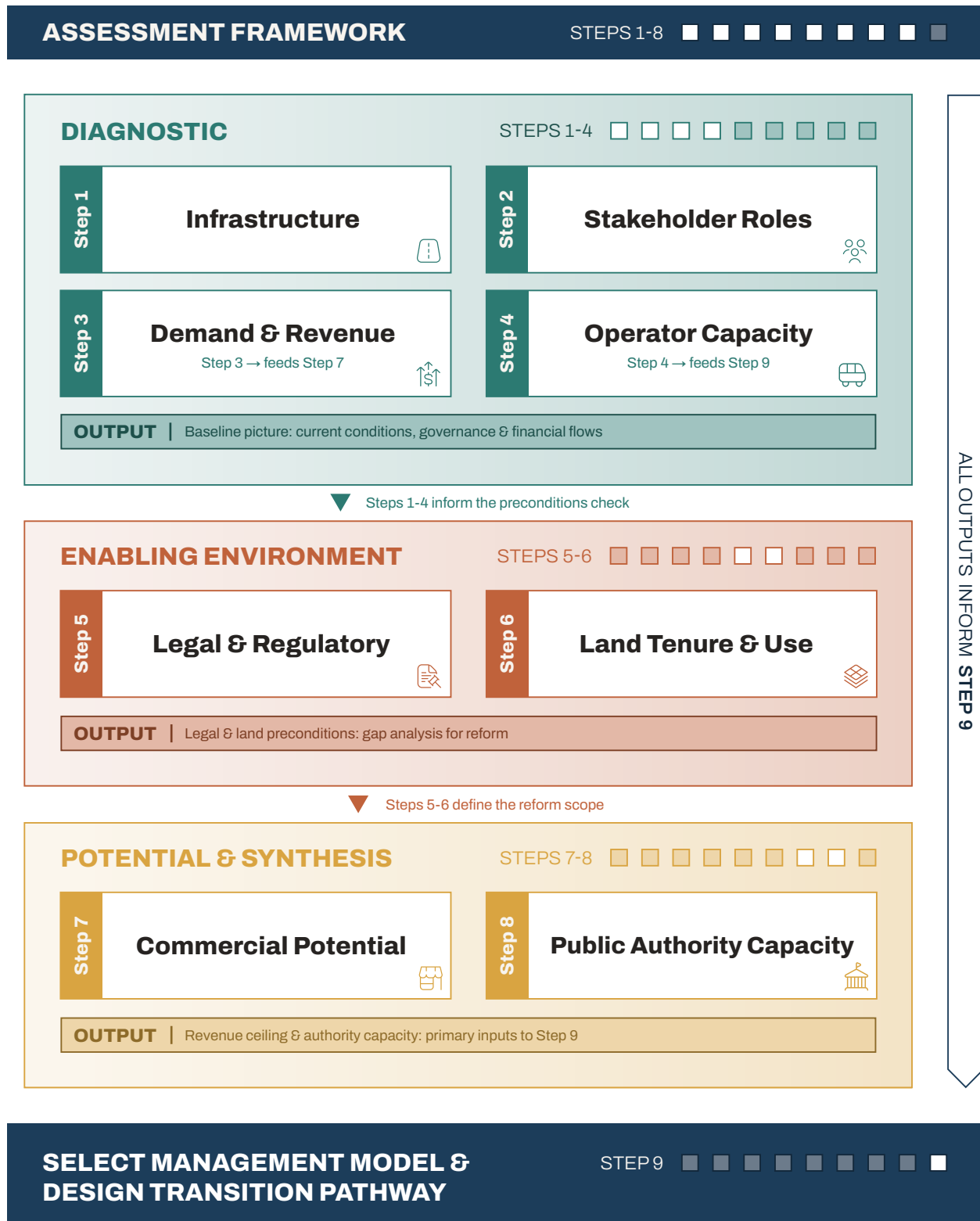
The second step maps the current governance landscape of the station: who does what, under what mandate, with what financial arrangements, and with what accountability to whom. This is the diagnostic equivalent of the stakeholder typology developed in Chapter 3, applied to a specific station rather than to the case studies as a whole.

The key questions are: Who currently manages transport operations at the station—which entity controls vehicle access, manages queuing and departure, and collects transport fees? Who manages commercial activity—which entity allocates vendor and shop space, collects rents or daily fees, and enforces spatial boundaries? Who holds ownership or administrative authority over the station—which public entity holds the land title, issues management mandates, and bears nominal responsibility for infrastructure? Are there overlapping or contested mandates—multiple public authorities claiming partial jurisdiction, as at Colobane in Dakar, or informal actors occupying roles that properly belong to public authorities?

Information for Step 2 must be gathered through structured stakeholder interviews rather than document review alone. The formal governance picture—which entity holds which mandate on paper—frequently diverges from the operational reality. At Colobane, CETUD's formal oversight role is clearly defined in its institutional mandate; in practice, it has been effectively displaced from station management for years. Understanding the gap between formal mandate and operational reality is the central purpose of Step 2.

FIGURE 11

Nine-step assessment framework



The output of Step 2 should include a clear identification of which of the four management models described in Chapter 4 best characterizes the current arrangement, and which management roles—if any—are performed by an entity with a clear mandate and adequate capacity. This mapping determines the starting point on the spectrum of arrangements and, combined with the findings of subsequent steps, informs the realistic scope of transition.

Step 2 should also document the current position of passengers in the governance landscape—not as a stakeholder group with formal representation, which they rarely have, but as the end-users whose experience provides the most direct indicator of whether current arrangements are functioning. Where user feedback mechanisms exist, however informally, they should be recorded; where they are absent, this gap should be noted as a governance deficit to be addressed in the design of any reformed arrangement.

A critical secondary output is the identification of the station transport manager role: who currently sits at the nexus of financial flows, exercises de facto control over station access, and would be most directly affected by a governance reform. As noted in Chapter 3, this role is critical—whoever holds it controls the station’s revenue streams and has a direct financial interest in the governance arrangements that control them. Any reform process that does not account for the interests and likely responses of the current station manager would be poorly designed.

Step 3: **Assess transport demand, revenue streams, and financial viability**

The third step establishes the financial picture of the station: how much economic activity it generates, how revenues are currently distributed across stakeholders, and whether the revenue base is sufficient to sustain a professional management arrangement.

The key questions are: What are the current traffic volumes—how many vehicles enter and exit per day, and what is the mix of vehicle types and routes? What revenues are generated from transport-related fees—parking charges, entry fees, per-departure levies—and who collects them? What revenues are generated from commercial activity—rents, daily vendor fees, ancillary services—and who captures them? What is the total daily income generated by the station, and what share of it reaches a public authority? Is the revenue base sufficient to sustain a professional management arrangement—including a private operator’s margin, basic maintenance costs, and a public authority oversight function?

Revenue data is the most difficult information to obtain reliably in informal station

environments. Associations and informal collectors have no incentive to disclose what they collect; vendors do not maintain accounts; municipal fee collectors may report receipts that differ significantly from actual collections. The most reliable approach combines direct vehicle counting—which gives an independent basis for estimating parking fee revenues from observed volumes and published fee levels—with vendor enumeration, structured interviews with association representatives, and comparison with stations of similar scale and management type. Passenger volumes and user satisfaction should be recorded alongside revenue data where possible. Daily passenger throughput provides an independent check on financial estimates—and, critically, a baseline against which the performance of any reformed management arrangement can eventually be measured.

The output of Step 3 is a financial flow diagram that maps revenue generation and distribution across all stakeholder groups, alongside a financial viability assessment that estimates whether a reformed management arrangement—at the level of ambition suggested by the findings of Steps 1 and 2—is financially sustainable from station revenues alone, or whether public subsidy or supplementary revenue sources would be required. This assessment is the primary input to Steps 7 and 9: it establishes the revenue ceiling that constrains the range of feasible management arrangements and identifies the minimum revenue threshold below which professional management—whether public or private—is not financially viable without external support.

Step 4:

Assess the organizational capacity of transport operators

The fourth step evaluates the organizational maturity of the transport operator associations currently managing or using the station—a dimension of institutional readiness that is frequently overlooked in station reform processes but is critical to their outcome.

The key questions are: How are transport operators organized at this station—as informal associations, registered unions, cooperatives, or formal companies? Do operator organizations maintain accounts, collect dues systematically, and enforce discipline among their members? Have operators engaged previously in formal contractual relationships with public authorities—in vehicle recapitalization programs, service contracts, or route licensing schemes? Are there established channels of communication between operator organizations and the relevant public authority, and do those channels produce productive dialogue or adversarial confrontation?

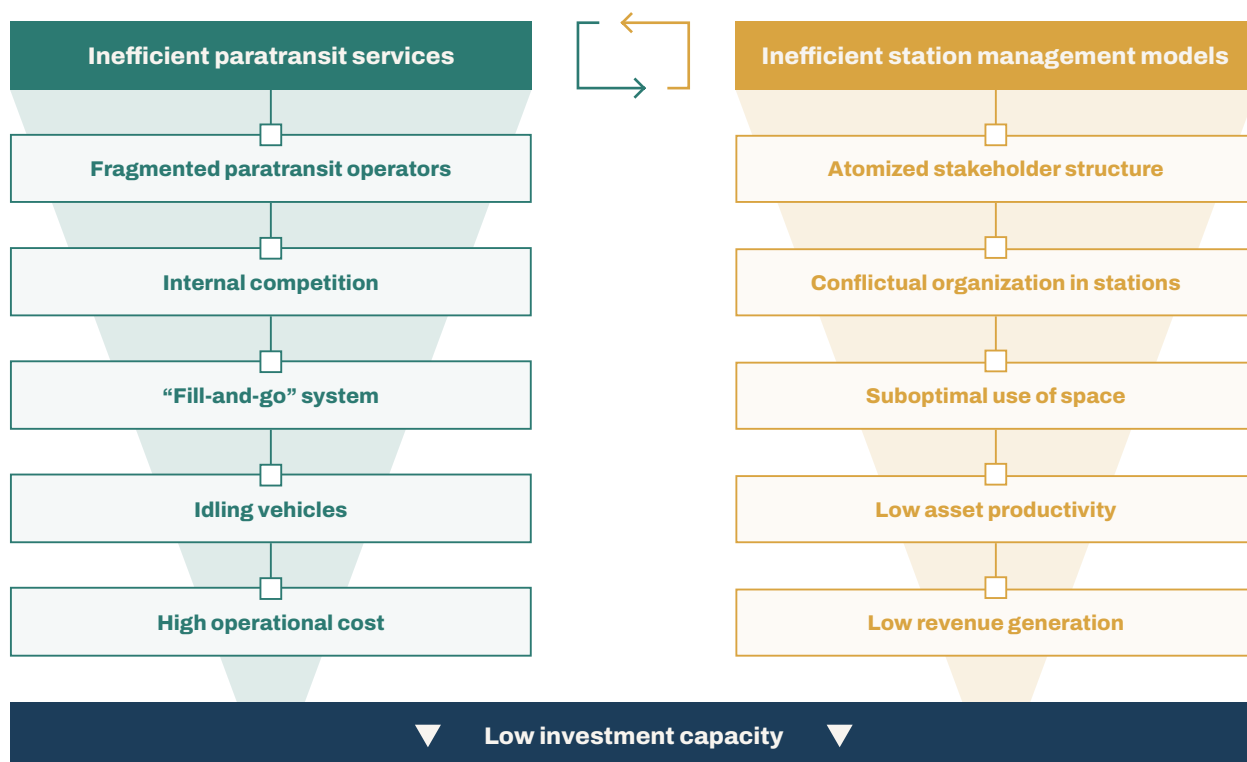
The rationale for this step is that the feasibility of different management arrangements depends in part on whether operator organizations are capable of being integrated into a reformed governance framework as partners rather than adversaries. A station where

operators are organized in a single, well-governed cooperative with a track record of contractual engagement is a fundamentally different reform environment from one where multiple competing associations operate without formal membership or financial management. In the former, operators may be willing and able to accept a reformed management arrangement that defines their rights and obligations contractually; in the latter, the reform process must first support the consolidation of operator organizations before a governance restructuring is feasible.

The stakes of this assessment are illustrated by the vicious cycle that characterizes most underperforming stations in the region. Fragmented operators, organized around individual vehicle ownership rather than collective service delivery, drive the internal competition and fill-and-go behaviors that generate idling, inflate operational costs, and—combined with the revenue leakage produced by atomized station governance—leave the system without the investment capacity needed to improve. Addressing operator fragmentation is therefore not a precondition to reform in an administrative sense only; it is the entry point to breaking a structural cycle that perpetuates underperformance on both the service and the management sides simultaneously.

FIGURE 12

Relationship between paratransit professionalization and station management improvement



The assessment of operator organizational capacity also informs the design of the transition pathway in Step 9. Where operator organizations are strong and well-governed, the reform process can engage them as co-designers of the new arrangement—as at Koudougou, where transport union delegates hold formal membership of the station management committee. Where they are fragmented and informally organized, the reform process must account for the time required to build organizational capacity before formal governance structures can be established. Attempting to impose a formal PPP arrangement on a station where operators are atomized and un-coordinated is likely to produce conflict rather than compliance.

Step 5: **Assess the legal and regulatory framework**

The fifth step evaluates the legal and regulatory environment within which station management reform must operate—identifying both the legal instruments available to public authorities and the gaps or ambiguities that constrain their ability to act.

The key questions are: Does the national or municipal legal framework define what a public transport station is, who is responsible for its management, and under what legal basis a public authority can grant a management concession or enter into a PPP arrangement? Is there a clear legal designation of which tier of government—national, metropolitan, or municipal—holds the mandate for bus station management, and is that designation consistent with the operational reality on the ground? Does the legal framework allow for the types of contractual arrangement envisaged in the reform—management contracts, concessions, Build-Operate-Transfer agreements—and does it provide adequate mechanisms for enforcement and dispute resolution? Are there existing regulations governing transport operator associations—their legal status, their rights at stations, and the conditions under which they can be excluded or restructured—and are those regulations enforced?

As noted in section 4.2, legal frameworks governing station management in Sub-Saharan Africa are frequently ambiguous, unspecific, or silent on this matter. In Abidjan, there is no legal definition of a public transport station—its minimum size, its required facilities, or the conditions under which it can be privately operated. In Maputo and Dar es Salaam, the division of responsibility between national road agencies, metropolitan transport authorities, and municipal governments is undefined at station level. This ambiguity is not merely a technical problem: it is the primary mechanism through which informal actors resist reform, claiming that no public authority has the legal standing to displace them.

The output of Step 5 is an assessment of the legal preconditions for the target management arrangement identified in Step 2, and a gap analysis identifying the legal

instruments—municipal decrees, ministerial instructions, amendments to transport authority mandates—that would need to be put in place before a formal management arrangement could be legally constituted. Where legal gaps are significant, the reform pathway designed in Step 9 must include a legal and regulatory reform component as a precondition, not a parallel track.

Step 6: **Assess land tenure and land-use conditions**

The sixth step addresses land tenure—the legal status of the land on which the station sits and the rights that flow from it. As established in section 4.3, secure land tenure is a foundational precondition for any reform: without it, no public authority can grant a formal management concession, no private investor can commit capital with confidence, and no institutional reform is legally defensible against challenge by actors who benefit from the current ambiguity.

The key questions are: Who owns the land on which the station sits—a municipality, a national agency, a private individual, or some combination? Is the land title clear, registered, and legally uncontested? If the station occupies public road reserve—as at Djéni Kobénan in Abidjan, where an individual built infrastructure on road reserve without authorization—what is the legal process for asserting public authority over that land and regularizing or terminating informal occupation? Are there competing ownership claims or jurisdictional disputes—as at Colobane, where the station straddles two municipal boundaries—and what legal mechanism exists for resolving them?

Two secondary questions are particularly important for stations with development potential. First, what land-use constraints apply—zoning regulations, proximity to a high-speed road, or adjacency to other infrastructure—and how do they affect what can be built or operated on the site? And where the land is owned by a national agency rather than the municipality, is there a clear framework for resolving the potential conflict between the landowner's authority and the municipality's planning and permitting role? At Mbezi in Dar es Salaam, for example, TANROADS owns the station land; the municipality issues building permits; but neither entity has a clear mandate to authorize commercial development within the station perimeter, creating a gap that has effectively blocked private investment in commercial infrastructure. Second, is there potential for land value capture—betterment taxes, development levies, or transfers of development rights—that could generate public revenue from the station's urban location without relying on transport fees or commercial rents? These instruments require advanced regulatory frameworks and are rarely applicable in the short term in the African context, but they represent a long-term revenue option for high-value urban stations that the assessment should flag.

The output of Step 6 is a land tenure assessment—a concise legal characterization of the station’s land situation—and a gap analysis identifying the specific legal steps required to regularize it: municipal decree, land title registration, resolution of competing claims, or formal termination of informal occupancy. Where these steps are simple and low-cost, they can be completed before the reform process moves further. Where they are complex—requiring political negotiation, legal challenge, or legislative action—they must be incorporated into the reform pathway as a long-term precondition.

Step 7: **Assess commercial development potential**

The seventh step evaluates the station’s capacity to generate revenues beyond transport fees—through commercial rents, parking, advertising, ancillary services, and potentially land value capture—and assesses whether that revenue potential is sufficient to sustain a professional management arrangement, attract private investment, or cross-subsidize transport operations.

A final note on the relationship between the framework and the assessment of commercial potential. Several of the steps in the framework—particularly Steps 6, 7, and 8—require financial data on current revenue flows and projections of future commercial income. In the informal station environments that characterize most of the case study cities, this data is difficult to obtain reliably. The framework provides guidance on how to approximate these figures through vehicle and passenger counting, vendor enumeration, and comparison with stations of similar scale and type. But decision-makers should approach revenue projections in informal station environments with caution. The most common failure mode in station PPP design is an overestimate of commercial revenue potential—producing a private partner who cannot achieve the projected return and either renegotiates the contract to the public authority’s disadvantage or exits the arrangement altogether. Conservative revenue assumptions are a structural feature of good concession design, not a mark of timidity.

The key questions are: What is the daily passenger throughput of the station—the number of passengers passing through rather than just vehicle entries—and is it sufficient to attract retail and service investment? What commercial activity currently exists within the station perimeter, and what does it reveal about the demand for commercial space at this location? Is the surrounding urban area commercially active—is the station embedded in a dense, economically vibrant neighborhood, or is it in a peri-urban or low-income context with limited retail demand? What physical space is available for commercial development—existing buildings, vacant land within the perimeter, or air rights above transport infrastructure—and what investment would be

required to develop it? Are there examples of comparable stations in the city or region that have successfully developed commercial activity, and what revenue levels have they achieved?

The assessment of commercial potential should be grounded in observed data wherever possible—vendor enumeration, revenue estimates from comparable stations, analysis of surrounding property values—and should explicitly avoid the optimism bias that has produced overestimated revenue projections in multiple case study stations. The Yaya Fofana experience is instructive: the station’s upper-floor commercial space was designed on the assumption that foot traffic would distribute vertically through the building, an assumption that proved incorrect when users concentrated at ground level. Commercial development projections should be tested against behavioral evidence from similar contexts rather than derived from theoretical demand models.

A specific question worth addressing in Step 7 is whether the commercial potential of the station justifies grouping it with neighboring stations under a portfolio concession. As discussed in section 4.2, individual stations with moderate revenue potential may not attract professional private management; a portfolio of ten to fifteen stations under a single concessionaire may do so. The commercial potential assessment should therefore consider not only the individual station but its position within the broader network of stations in the city—identifying whether a portfolio approach would unlock management arrangements that individual station economics cannot sustain.

The output of Step 7 is a revenue potential estimate—covering both transport-related and commercial income—and a preliminary assessment of whether the station’s financial profile is compatible with the management arrangement indicated by the findings of the preceding steps. This output is the primary financial input to Step 9, and it determines the degree to which private-sector involvement is financially viable without public subsidy.

Step 8:

Assess public authority capacity

The eighth step evaluates the institutional capacity of the public authority responsible for station management—its financial resources, technical expertise, operational capacity, and—critically—its ability to negotiate, monitor, and enforce contracts with private partners. This assessment is the most consequential of the nine steps, because the feasibility of every management arrangement above Model 1 depends on the public authority’s capacity to exercise effective oversight.

The key questions are: Does the public authority have clear legal standing to act as station manager or to grant a management concession—and if not, what steps are required to establish it? Does it have the financial resources to fund basic infrastructure investment—paving, lighting, drainage, sanitation—without which no governance reform will deliver meaningful improvement? Does it have the technical staff to manage transport operations directly under Arrangement A, or to monitor a private operator's compliance with contractual obligations under Arrangements B, C, or D? Has it previously entered into formal contracts with private partners—management contracts, concessions, service agreements—and does it have experience monitoring and enforcing them? Does it have access to legal counsel capable of drafting and reviewing concession contracts? And does it have the political will—at the level of elected officials and senior management—to sustain a reform process through the resistance that governance change typically generates?

Contract management capacity deserves particular emphasis. Across the case studies, the most consistent failure mode in formally structured arrangements is the gap between the ambition of the contract and the public authority's capacity to enforce it. Makumbusho is the clearest illustration of this failure. The PPP contract assigns maintenance obligations to a professional agent—but the municipality lacks the inspection capacity to verify compliance, the key performance indicators framework to measure performance, and the legal confidence to impose penalties. The result is that the contract's transport performance provisions are effectively unenforceable, and the private partner operates as if they do not exist. This is a predictable consequence of designing a contract whose enforcement requirements exceed the capacity of the authority charged with enforcing it, and it recurs wherever formal arrangements outpace institutional capacity.

The practical implication is that the management arrangement selected in Step 9 must be calibrated to the public authority's actual capacity—not to its aspirations. A simpler arrangement that is well designed and actively monitored will consistently outperform a sophisticated arrangement that is poorly enforced. Where contract management capacity is limited, the reform pathway must include a capacity-building component—training, technical assistance, institutional restructuring—delivered before or alongside the introduction of new management arrangements, not as an afterthought.

A useful analytical tool for Step 8 is a simple capacity matrix that maps the public authority's performance against four dimensions: financial resources, technical expertise, contract management experience, and political commitment. Each dimension is rated on a three-point scale—limited, moderate, or strong—producing a profile that guides the selection of an appropriate arrangement in Step 9. An authority rated “limited” across all four dimensions is a candidate for Arrangement A, with

significant external technical assistance. An authority rated “strong” across all four is a candidate for Arrangements B or C, with the design of the concession or PPP structure calibrated to the specific features of the station. An authority with moderate capacity overall but strong political commitment—which is the most common profile in the case study cities—is a candidate for an incremental transition, beginning with public consolidation and moving toward private-sector involvement as capacity is built through experience.

Step 9: **Select a management arrangement and design the transition pathway**

The ninth and final step synthesizes the findings of the preceding eight steps into two outputs: a selection of the most appropriate management arrangement from the four alternatives presented in Chapter 4, and a transition pathway that specifies the sequence of actions required to move from the current situation to the target arrangement.

The selection of a management arrangement is determined by the intersection of three findings from the preceding steps: the station’s revenue potential (Step 7), the public authority’s institutional capacity (Step 8), and the preconditions that are already in place—land tenure, legal mandate, operator organizational capacity—versus those that still need to be established (Steps 5, 6, and 4). The decision logic is as follows.

Where revenue potential is low and public authority capacity is limited, the target arrangement is Arrangement A—consolidated public management—with significant external technical and financial support. The priority is establishing the foundational preconditions: land tenure, legal mandate, ring-fenced revenues, and basic infrastructure investment. Private-sector involvement is deferred until these preconditions are in place and the station is generating sufficient revenue to attract a credible private partner.

Where revenue potential is moderate and public authority capacity is moderate or strong, the target arrangement is Arrangement B—public ownership with private operations management—structured as a management contract rather than a full concession if revenue risk is significant, or as a concession if the revenue base is sufficient to sustain a private return. The priority is contract design: ensuring that all three management roles are assigned to a single private operator, that maintenance obligations are specifically defined and financially penalized, and that the public authority has the monitoring capacity to enforce them.

Where revenue potential is high and there is demonstrated commercial development interest from the private sector, Arrangement C—shared investment with private

construction and operations—becomes viable, particularly if the public authority lacks the capital to finance station construction or major rehabilitation. The priority is transaction design: structuring the concession so that transport performance obligations are as legally binding and financially penalized as commercial rights are lucrative, and ensuring that the risk of commercial underperformance is borne by the private partner rather than transferred to the public authority through renegotiation.

Arrangement D—full private financing, construction, and operations—is reserved for the small number of stations where commercial revenue potential is very high and demonstrably sufficient to sustain a full private return without public subsidy. In most Sub-Saharan African cities, and for most of the station types covered in this study, this threshold is not met.

The transition pathway specifies the sequence of actions required to move from the current arrangement to the target. It should cover four dimensions. First, the legal and regulatory steps required to establish the institutional mandate and land tenure status necessary for the target arrangement—municipal decrees, ministerial instructions, land title registrations. Second, the infrastructure investments required to bring the station to a condition compatible with the target arrangement—basic paving, lighting, drainage, and road-station interface improvements that demonstrate public commitment and generate the operational conditions under which a private partner can function. Third, the stakeholder engagement process required to build the political conditions for reform—structured dialogue with operator associations, transparent communication about the reform’s objectives and timeline, and where possible the design of transition arrangements that convert potential opponents into stakeholders in the new system. Fourth, the institutional capacity-building measures required to enable the public authority to exercise effective oversight of the target arrangement—contract management training, technical assistance for concession design, and the establishment of monitoring mechanisms that can track performance against contractual obligations in real time.

The transition pathway should specify a realistic timeline for each component, identify the entities responsible for each action, and flag the dependencies between them—the steps that must be completed before others can begin. It should also identify the risks that could derail the transition—political change, operator resistance, commercial underperformance, legal challenge—and specify the contingency measures that would be activated if those risks materialize.

A final recommendation concerns the establishment of a station management committee at each station undergoing reform—a governance body that brings together all relevant stakeholders: the public authority, operator associations, traders and vendors, and where applicable the private manager or concessionaire. The committee

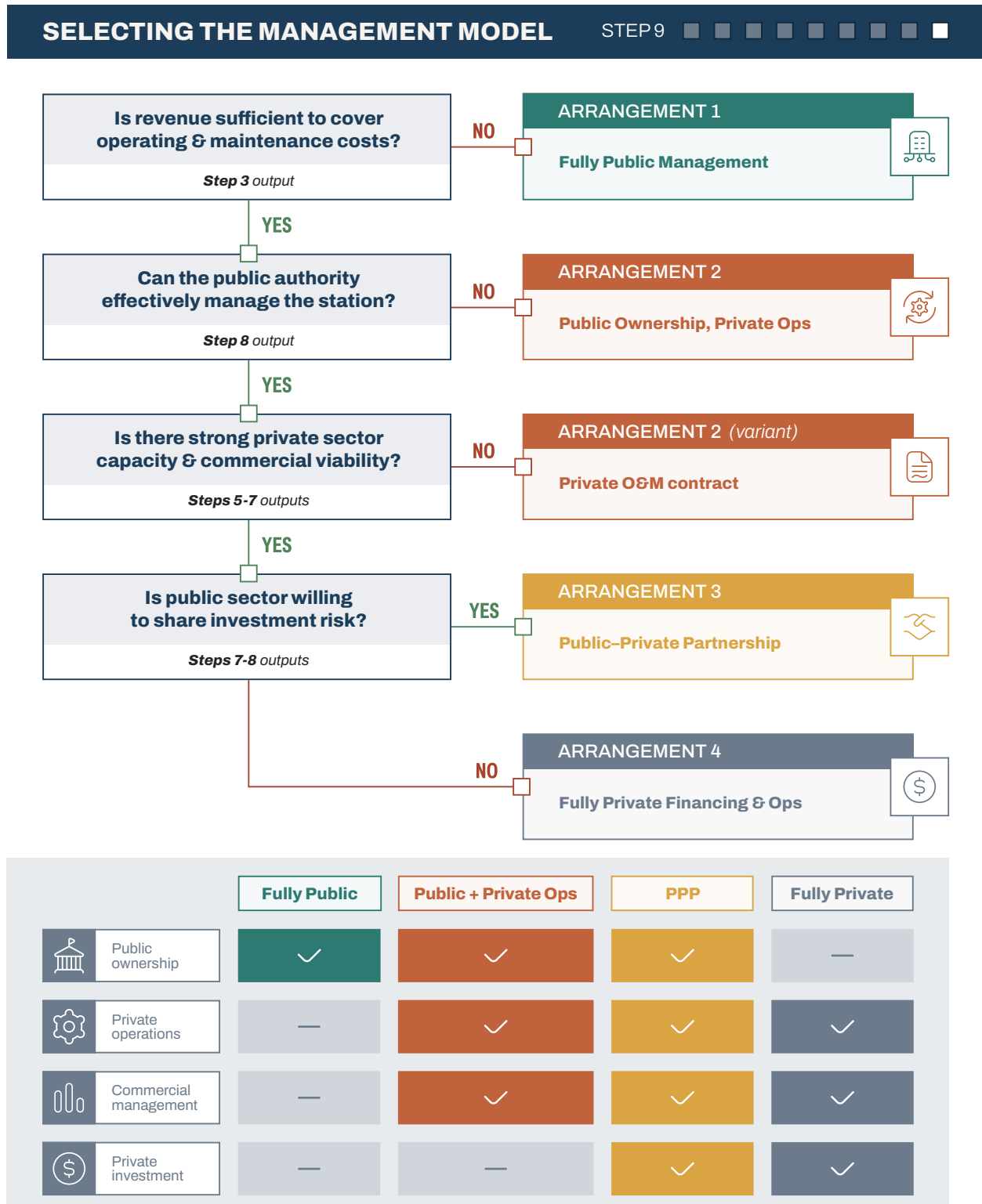
does not hold management authority; that is the private operator's or public authority's domain. Its function is to provide a structured forum for information sharing, conflict resolution, and the monitoring of reform progress. The experience from Koudougou, where transport union delegates hold formal membership of the management committee, suggests that this kind of inclusive governance structure reduces the risk of reform being derailed by stakeholder opposition—not by eliminating conflict, but by providing a legitimate channel through which it can be expressed and resolved.



Gbakas (collective minibuses) parked at Djéni Kobénan station in Abidjan

FIGURE 13

Decision tree for the selection of a management model





06

CONCLUSION

Bus stations are not a peripheral concern in African urban transport. They are the nodes through which the majority of urban passengers access public transport services, the sites where transport operators organize their daily operations, and the locations where informal economies generate income for hundreds of thousands of households across

the continent. Their poor performance—congested, underfunded, poorly maintained, and governed by arrangements that serve operators rather than users—is not an inevitable feature of the African urban context. It is the product of institutional arrangements that have evolved without deliberate design and have never been seriously reformed.



This report has argued that improving station performance is fundamentally a governance challenge. The physical deficiencies documented across the eight case study stations—deteriorated infrastructure, inadequate passenger facilities, unsafe road interfaces—are symptoms of institutional failure rather than causes in their own right. Addressing them requires not just capital investment but a restructuring of the roles, incentives, and accountabilities that determine how stations are managed. Capital invested in a station without a capable management arrangement to maintain it will not produce durable improvement—as the experience of several formally developed stations in the study demonstrates.

The report's central argument is that public authorities must move from passive to active: from collecting fees and tolerating informal management to defining clear institutional frameworks, assigning roles deliberately, and exercising meaningful oversight over whoever manages the station on the public authority's behalf. This shift does not require public authorities to manage stations directly—in many cases, private management under public oversight will deliver better outcomes than direct public operation. But it does require public authorities to act as system planners: selecting management arrangements appropriate to the context, designing contracts that align private incentives with public objectives, and building the institutional capacity to monitor and enforce those contracts over time.

What the case studies reveal

The eight stations examined in this study span a wide range of institutional arrangements and performance outcomes, and their variety is one of the report's most valuable findings. They demonstrate that formalization is possible—that African cities can move from entirely informal operator-led management to professionally organized station operations—but that the pathway from one to the other is neither automatic nor linear.

Baux Maraîchers in Dakar shows what a well-designed concession can achieve: unified management responsibility, systematized revenue collection, reinvestment in infrastructure, and a level of operational order that stands out in the regional context. But it also reflects a specific enabling environment—a capable transport authority with a clear legal mandate, a competitive selection process, and sustained institutional support—that is not yet present in most of the cities studied.

Makumbusho in Dar es Salaam shows the cost of a formal arrangement without adequate contract design and enforcement capacity. The PPP structure was in place; the institutional capacity to make it function was not. The result is a privately profitable facility that underperforms as a transport station, with the public authority unable to enforce the obligations it nominally holds. This is the most common failure mode in

station reform—not that reform is attempted and defeated by opposition, but that formal arrangements are put in place without the institutional conditions to make them work.

Yaya Fofana in Abidjan shows that even ambitious, purpose-built stations with centralized management can fail commercially if their design does not reflect how users actually behave. And Colobane in Dakar shows that jurisdictional complexity—multiple authorities with overlapping and contested roles—is as disabling as outright institutional absence. The range of failure modes is as instructive as the range of successes.

The limits of this study

The conclusions of this report rest on eight case studies in four cities—a sample sufficient to identify patterns and develop a framework, but not to make claims about the full diversity of station management contexts across Sub-Saharan Africa. The cities studied—Abidjan, Dakar, Dar es Salaam, and Maputo—are among the continent’s larger urban centers, with relatively developed transport authority structures and, in some cases, prior experience of paratransit reform. The findings may not transfer directly to smaller cities, or to cities with significantly different political economy conditions.

The financial data underlying the analysis is also imperfect. Revenue estimates at the most informal stations are approximations derived from vehicle counting and interview data; several key figures—notably commercial revenues at Makumbusho—could not be obtained because private operators declined to share them. The qualitative findings of the report—about governance fragmentation, role confusion, and incentive misalignment—are more robust than the specific revenue figures, which are best used for illustrative purposes rather than as a basis for financial projections.

Priorities for policy and reform

Three priorities emerge from the analysis as the most consequential for decision-makers in African cities and for the development partners supporting them:

- The first priority is legal and regulatory clarification. The absence of a clear legal framework governing bus station management—defining what a station is, which tier of government is responsible for it, and under what legal basis a management concession can be granted—is the single most important structural barrier to reform. Without this, no public authority has unambiguous standing to act, and informal actors can resist reform by exploiting jurisdictional ambiguity. National transport laws and metropolitan governance frameworks need to be updated to

address this gap explicitly. This is a legislative and regulatory reform agenda, not a technical one, and it requires political engagement at the national level alongside the station-level work that most reform programs focus on.

- The second priority is contract management capacity. The case studies consistently show that the quality of governance arrangements depends less on the sophistication of the contract and more on the public authority's capacity to monitor and enforce it. Building this capacity—through training, technical assistance, and the establishment of dedicated station management units within transport authorities—is more valuable than designing elaborate PPP structures that cannot be enforced in practice. Development partners investing in bus station reform should allocate resources to capacity building as systematically as they allocate resources to infrastructure investment.
- The third priority is the integration of station management into broader public transport reform programs. Across the continent, governments are investing in BRT systems, vehicle recapitalization programs, and network restructuring. These investments consistently deliver less than their potential because the stations through which passengers access the improved services remain ungoverned and poorly functioning. Station management reform should be a standard component of public transport investment programs—not an afterthought. The enabling conditions for better station governance—institutional mandates, ring-fenced revenues, basic infrastructure investment—can and should be built into the design of transport reform programs from the outset.

Looking ahead

Two emerging trends will reshape the context for bus station management in African cities over the coming decade. The first is electric mobility. The transition to electric buses and minibuses—already underway in several African countries—will make station infrastructure significantly more expensive and more operationally critical. Charging facilities, electrical connections, and load management systems require capital investment of a different order from paving and drainage. The management arrangements that can attract and sustain investment at that scale—formal concessions, PPP structures with long-term horizons, dedicated public companies with access to development finance—need to be established now, before the transition accelerates and the infrastructure gap widens. None of the eight case study stations currently has electric charging infrastructure, and none is governed by an arrangement that would easily accommodate the investment decisions required to provide it.

The second trend is the ongoing corporatization and professionalization of the paratransit sector in several African cities. As operators move from individual

vehicle ownership toward cooperative or corporate structures—through programs such as the GIE model in Senegal or vehicle recapitalization schemes in Côte d'Ivoire and Tanzania—their relationship with station management changes. Corporatized operators are better placed than individual owner-drivers to engage in formal contractual relationships with station managers and public authorities, to accept revenue-sharing arrangements, and to invest in station infrastructure as part of their broader operational model. Station governance reform and operator professionalization are not separate agendas—they are mutually reinforcing, and policy frameworks that address them together will deliver more durable results than those that treat them in isolation.

The governance of bus stations is unglamorous work. It does not attract the political visibility of a new BRT line or the technical interest of a fleet electrification program. But it is foundational. The reforms described in this report—clarifying mandates, designing contracts, building capacity, sequencing transitions—are the conditions under which all other investments in African urban transport deliver their intended value. A well-governed station is not an end in itself. It is the point at which the transport system meets its users, and where the quality of that meeting is determined.

APPENDICES

Presentation of the Eight Case Studies

[Dakar,
Senegal]



Colobane
Baux Maraîchers

[Abidjan,
Côte d'Ivoire]



Yaya Fofana
Djéni Kobénan

[Maputo,
Mozambique]



Zimpeto
Malhampsene

[Dar es Salaam,
Tanzania]



Makumbusho
Mbezi

Colobane Station

[Dakar, Senegal]



Station Profile

Colobane station is an urban and metropolitan-scale station located near the end of the Dakar peninsula, roughly 5 km from the city center, close to the communes of Dakar-Médina and Dakar-Plateau. It covers approximately 1.91 hectares and benefits from strong intermodal positioning, sitting adjacent to a TER (regional express train) station and a BRT line. Originally planned for three modes—formal/institutional buses, paratransit midi-buses (Ndiaga Ndiaye), and metered taxis—the station has since evolved: professionalized AFTU minibuses were added, while the metered taxi area has fallen largely out of use.

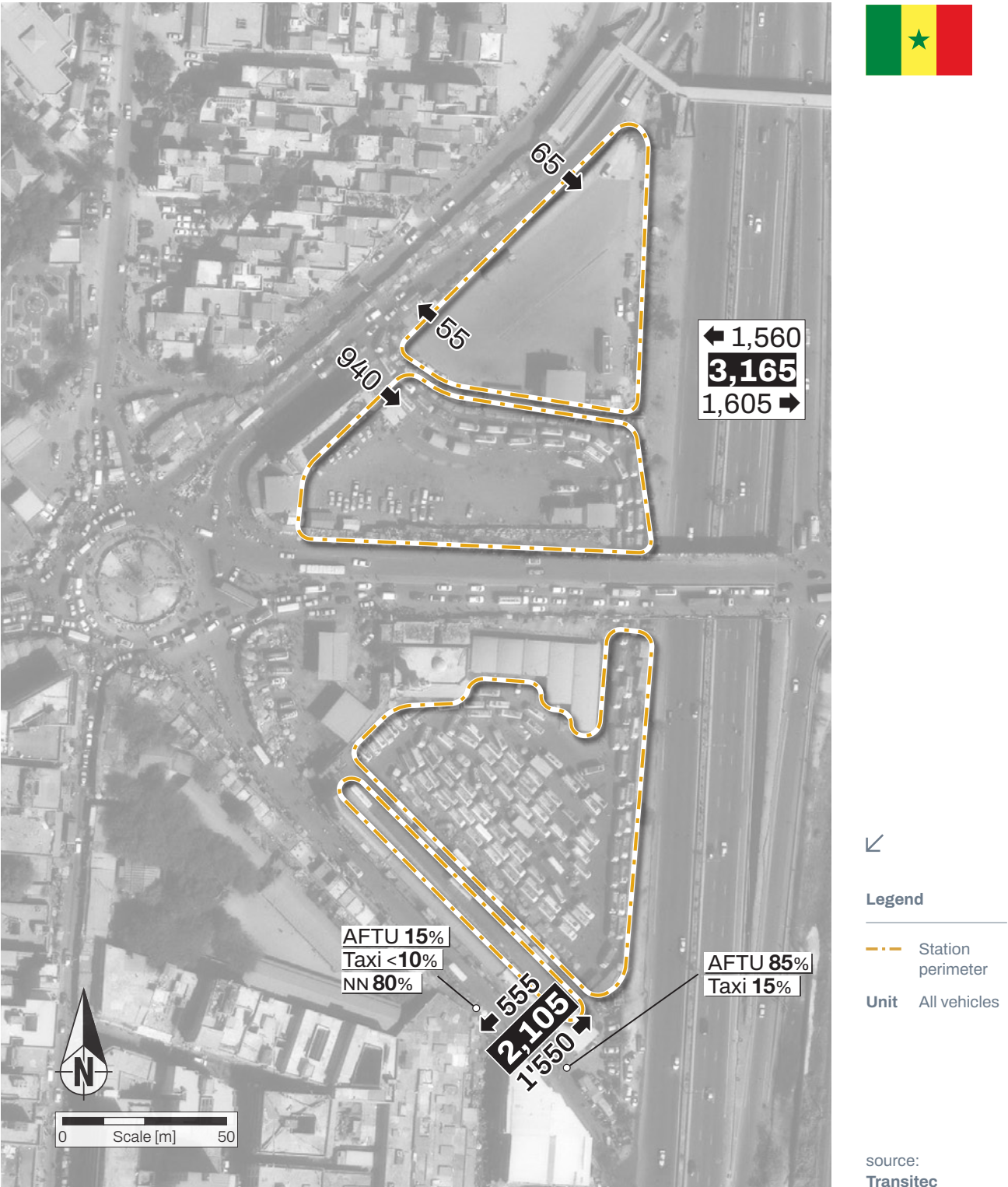
On a typical day, Colobane handles about 1,500 vehicle entries and exits, of which 90.5% are paratransit and 9.5% institutional transport services. Ndiaga Ndiayes account for the largest share (444 vehicles/day), followed by AFTU (83), Dakar Dem Dikk (65), and metered taxis (56). Based on an estimated 35 passengers per paratransit vehicle, the station serves approximately 49,400 passengers per day, most of them commuters traveling between Greater Dakar and the city center.

Infrastructure & Physical Conditions

Colobane's infrastructure is in poor condition relative to its traffic volume. The station faces extreme pressure from heavy vehicle traffic, resulting in chronic congestion where queues of Ndiaga Ndiaye vehicles frequently extend from the station entry back to the motorway. This density leads to significant noise and environmental pressure on the surrounding neighborhood. There is no wayfinding signage, no perimeter fencing, no toilet facilities, no waste management, and no roof or seating in the boarding area. Mechanics have occupied former circulation areas, in some cases blocking vehicle access. Parking patterns reflect a “fill-and-go” model, with vehicles frequently forced into extended waiting times.

FIGURE 14

Daily vehicle flows entering and exiting Colobane station [5AM to midnight]



AFTU waiting
buses at
Colobane station

©
Transitec
Consulting
Engineers



Governance & Institutional Framework

Colobane's governance is fragmented and contested. Land ownership is split between two municipalities—Gueule Tapée and HLM—while the transport authority (CETUD) holds a formal but largely sidelined jurisdictional claim. The station manager operates under a contract with the Gueule Tapée commune rather than with CETUD, reflecting a historical shift in which CETUD was effectively excluded from the governance arrangement. HLM is nominally the owner of the northern half of the plot but plays a marginal role, and its relationship with transport operators is difficult. Dakar Dem Dikk manages its own operations largely independently, with limited interaction with the station manager.

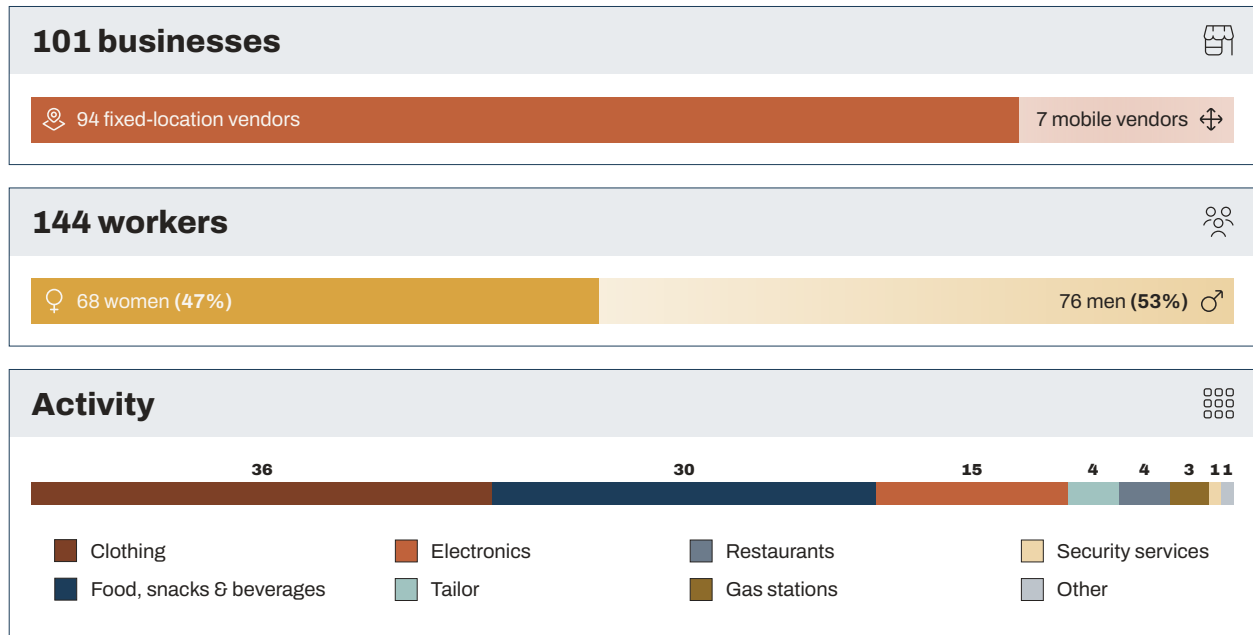
The overall arrangement is best described as “affermage” (lease-style management), in which public institutions are present mainly as income recipients rather than active managers. In the study's typology, Colobane is classified under “Institutional ownership with operators' management.”

Financial Model & Revenue Flows

Passengers pay a fare to operators for transport services; operators pay a daily parking fee to the station manager, plus separate fees to their route associations or union per departure. The station manager remits a share of income to the Gueule Tapée commune. AFTU pays a daily infrastructure fee to the station manager but not to route associations; Dakar Dem Dikk pays nothing to the station manager. Commercial vendors pay weekly fees for space, with the municipality collecting additional taxes on commercial activity. Daily income from transport operations is estimated at 645,000 CFA francs (FCFA; US\$1,098).

FIGURE 15

Commercial activity characteristics at Colobane station



Private Sector Participation

Private sector involvement at Colobane is informal and operator-led. The station manager's contract with Gueule Tapée functions as a de facto lease, but with no formal delegation framework, performance standards, or investment obligations. Transport operators and their unions carry an outsized management burden—handling informal upkeep, dispatch, and fare-setting—while receiving little institutional support or capital investment in return.

Key Findings

Colobane illustrates how institutional fragmentation—rather than any single design flaw—can be the primary driver of station underperformance. Divided and unclear land ownership between two municipalities and CETUD has produced a governance vacuum in which no institution is accountable for physical conditions or investment, despite a daily throughput of some 49,400 passengers. The “affermage”-style arrangement channels institutional involvement almost exclusively toward revenue collection, leaving infrastructure and passenger amenities unaddressed. The exclusion of CETUD from active governance means station-level standards are set informally, undermining consistency with citywide transport planning. Any reform pathway will need to start with resolving land ownership and re-establishing CETUD's role before other improvements can take hold.

Baux Maraîchers Station

[Dakar, Senegal]



Station Profile

Baux Maraîchers is an urban, interurban, and international station situated outside Dakar's city center, adjacent to the toll motorway and positioned between the rail infrastructure (TER) and the highway. At approximately 10.5 hectares, it is substantially larger than Colobane and serves a much wider range of modes: international buses, scheduled interurban medium-capacity buses, AFTU midibuses, Dakar Dem Dikk formal buses, collective taxis, and metered taxis. It was built with State funding at an estimated cost of 7.5 billion FCFA (roughly US\$12.77 million) and opened in September 2014.

On a typical day, Baux Maraîchers handles around 1,350–1,400 vehicle entries and exits, dominated by interurban and international buses (approximately 950 entries/day), alongside AFTU minibuses (215) and metered taxis (185). Despite its large footprint, parking occupancy analysis shows roughly 800 vehicles parked on site during the day, reflecting extended dwell times outside of rush hours. Estimated daily passenger flow is approximately 10,100 passengers—considerably lower than Colobane's figure, reflecting the interurban rather than mass urban commuter profile of the station.

Infrastructure & Physical Conditions

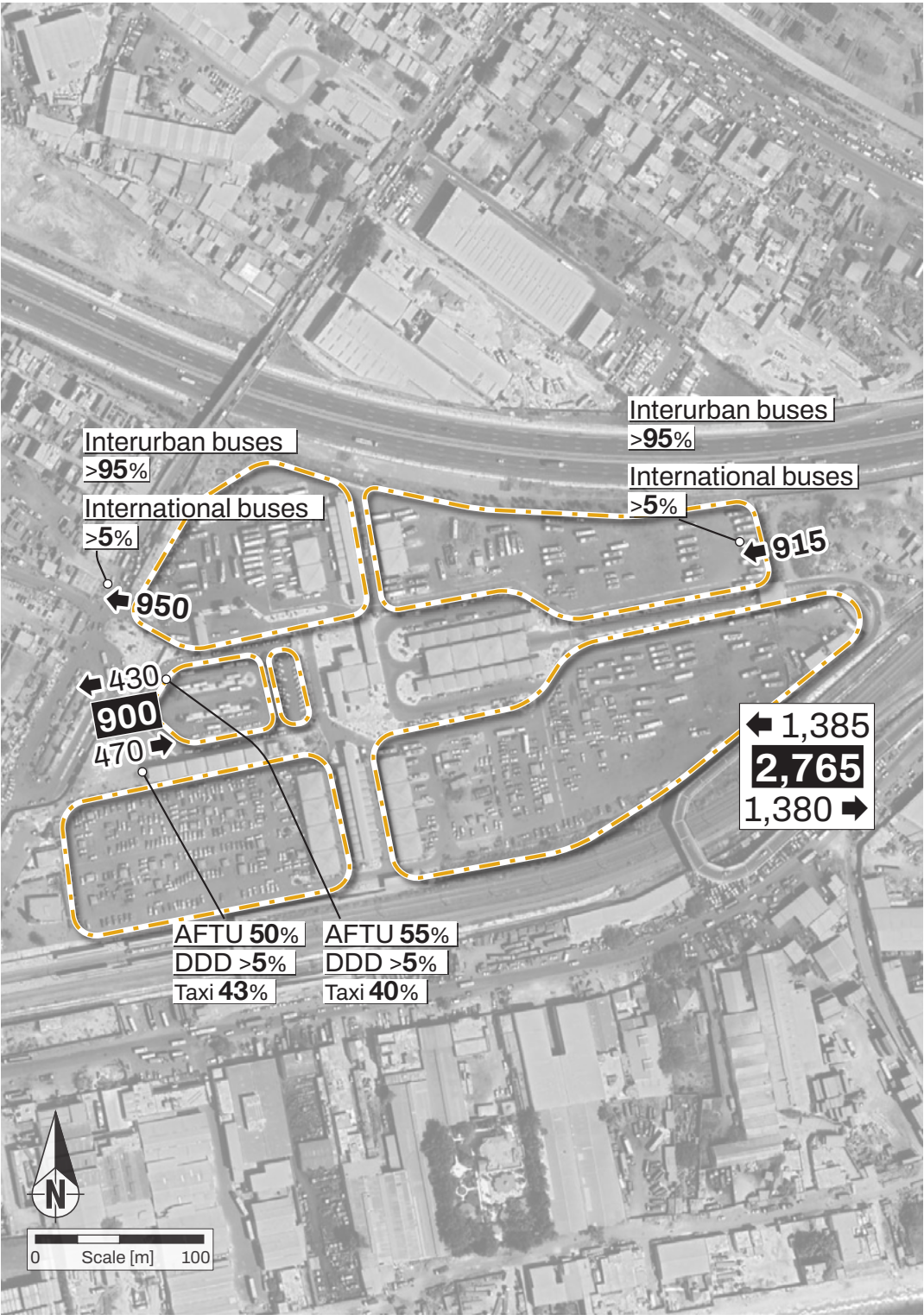
Baux Maraîchers has a planned layout organized into four distinct transport zones and offers more amenities than most stations in this study—including passenger counters, a car wash, a driving license desk, operator welfare services, a mechanic workshop, and a mosque. Constructed by the State to offer a qualitative experience for passengers, the station features a well-planned layout with four distinct quadrants. While the site is large (10.5 hectares), it is often used for extended parking and fleet stocking during off-peak hours rather than just passenger transit.

Governance & Institutional Framework

Baux Maraîchers stands out in the study as the clearest example of formal, uncontested institutional governance. Land ownership and management authority are both vested in CETUD, the urban transport authority, which financed the station's construction through State funds. CETUD has delegated daily management operations to a private company under a formal 10-year concession

FIGURE 16

Daily vehicle flows entering and exiting Baux Maraîchers station [5AM to midnight]



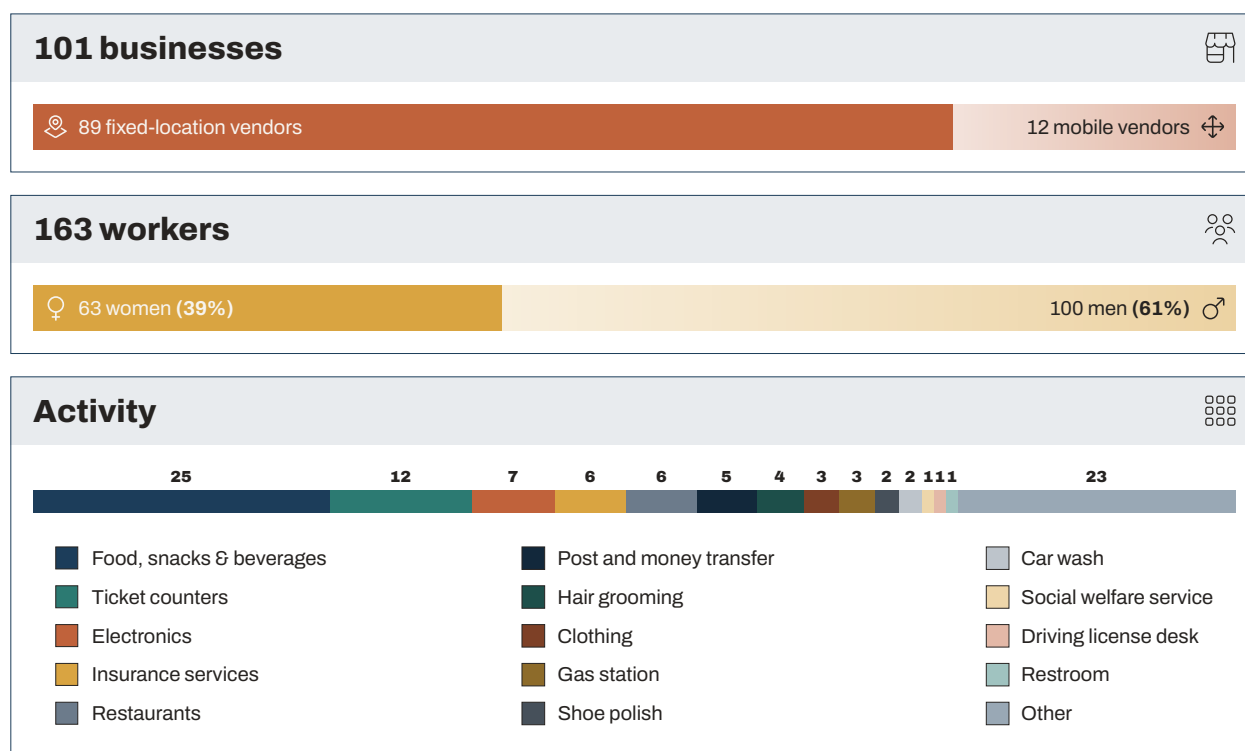
contract—a model classified in the study’s typology as “Institutional ownership with private management.” CETUD retains the authority to set performance targets and to terminate the concession, giving it meaningful oversight leverage that is absent in most other stations in this study.

Financial Model & Revenue Flows

Revenue flows are consolidated under the private concessionaire, which collects fees from all transport operators and commercial tenants. Parking fees are charged daily by vehicle type: international buses pay 30,000 FCFA per day (US\$51.10), interurban buses FCFA per day (approx. US\$8.52), Ndiaga Ndiaye 5,000 FCFA per day, Dakar Dem Dikk 4,500 FCFA per day (US\$7.66), and AFTU 500 FCFA per day (approx. US\$0.85). The concessionaire also collects monthly rents from commercial businesses operating within the station. Total estimated daily collection from transport operations is approximately 4,640,000 FCFA (approx. US\$7,902.45)—significantly higher than at Colobane, reflecting both the volume of interurban operators and the higher fee rates. The concessionaire uses these revenues for station maintenance and operations, without making payments to transport associations or local institutions.

FIGURE 17

Commercial activity characteristics at Baux Maraîchers station





View of the
Baux Maraîchers
station in Dakar

©
Transitec
Consulting
Engineers

Private Sector Participation

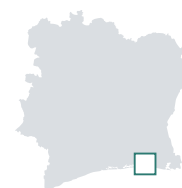
Baux Maraîchers represents the most formalized private sector participation model among the Dakar stations. The private concessionaire acts simultaneously as transport station manager and manager for commercial activities, operating under a structured 10-year contract with clear accountability to CETUD. This stands in contrast to the informal, association-driven arrangements at Colobane: here, a single professional entity is responsible for both transport revenue collection and commercial space management, creating a unified management structure and reducing the fragmentation that plagues less formal stations.

Key Findings

Baux Maraîchers demonstrates that a clearly defined institutional ownership structure—with a single public authority as owner and a formal private concessionaire as manager—can significantly reduce governance conflict and produce a more stable operating environment. The model is broadly accepted by operators and gives the public authority meaningful contractual leverage over management quality. However, the station also illustrates that good governance alone does not guarantee operational success: despite its formal management structure and large size, physical performance is hindered by its landlocked position, which leaves its qualitative infrastructure and intermodal potential underutilized. This leads to acute peak-hour congestion at its limited access points. The gap between station's governance and these operational bottlenecks suggests that investment obligations and infrastructure standards need to be built more explicitly into the concession contract, and that coordination with adjacent transport infrastructure (TER, highway) requires dedicated attention beyond the station's perimeter.

Yaya Fofana Station

[Abidjan, Côte d'Ivoire]



Station Profile

Yaya Fofana station is located in Koumassi, one of the 13 municipalities of Abidjan, on a site that formerly served as a wasteland and informal market. Built in 2018 following a political decision by the Koumassi mayor—in consultation with transport unions—the station replaced informal paratransit operations at the congested Espérance intersection 2.5 km to the west. At 0.5 hectares, it is the second smallest station in this study, with a compact layout organized into two zones: a small client parking and commercial area, and a larger zone dedicated to transport operations and a gas station. It primarily serves paratransit modes—woro-woros (communal shared taxis), picknicks (7-seater vehicles), and taxicabs—while gbakas (informal minibuses) are excluded but may stop nearby. Roughly 1,500 vehicles use the station daily, with approximately 1,350 dedicated to paratransit operations such as woro-woros, picknicks, and communal taxis.

Infrastructure & Physical Conditions

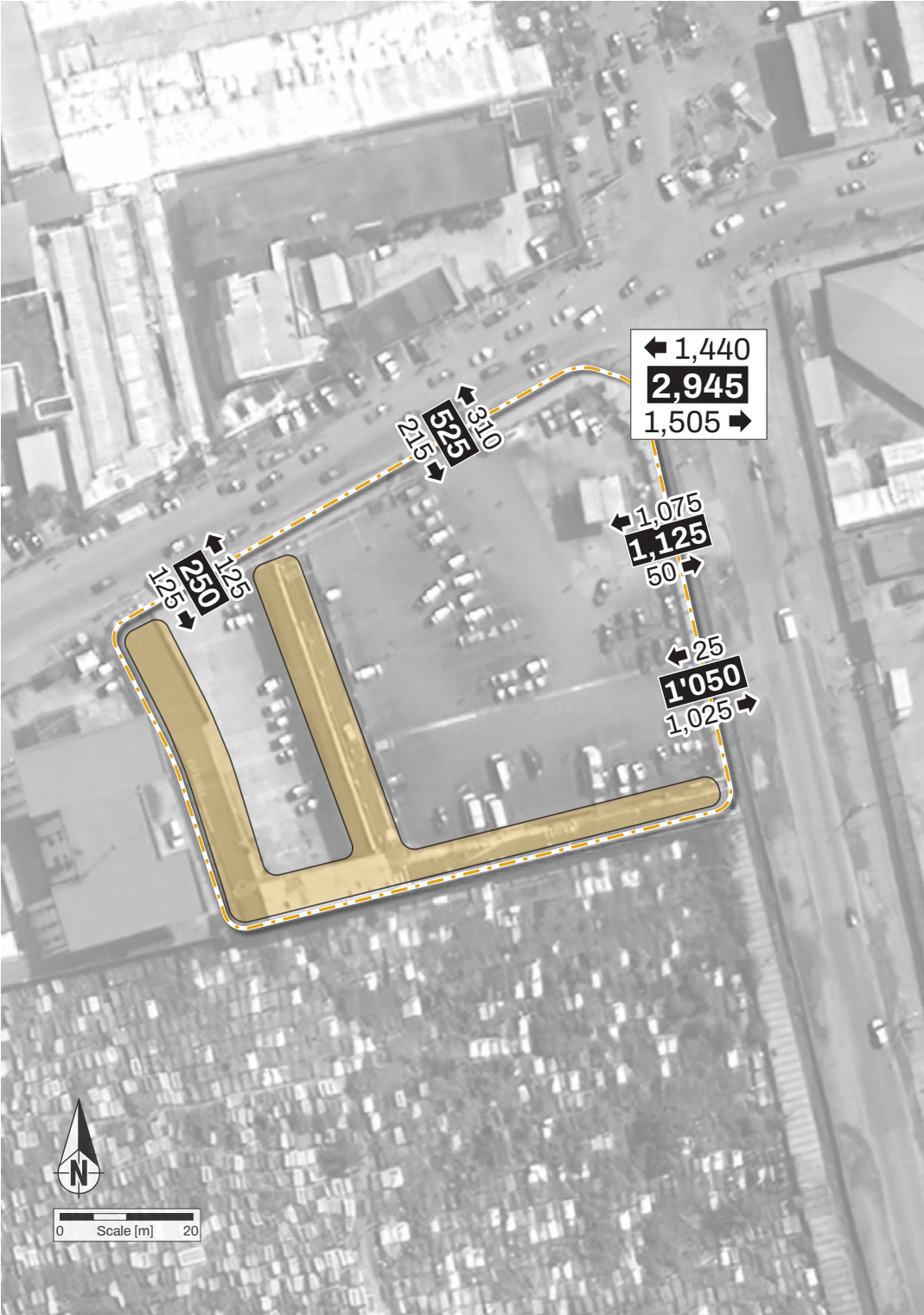
Despite its small size, Yaya Fofana is among the better-maintained stations in this study. A two-story commercial building—financed and constructed by a private investor—houses management offices, passenger counters, waiting rooms, toilets, and 69 retail units. A gas station on the perimeter offers commercial discounts to operators. The station is closed at night for security, and a CCTV system is in place. However, some conditions fall short: toilet facilities are not gender-specific, raising usability concerns for women, and only around half of the retail units are currently occupied, casting doubt on the financial model's long-term viability.

Governance & Institutional Framework

Yaya Fofana operates under a municipality-led governance model. The Koumassi municipality is the central institutional actor, having authorized a private company to construct and manage the commercial building, while appointing a station manager by mayoral decree to oversee daily transport operations. The station manager is not a municipal employee but reports to the municipality and

FIGURE 18

Daily vehicle flows entering and exiting Yaya Fofana station [5AM to Midnight]



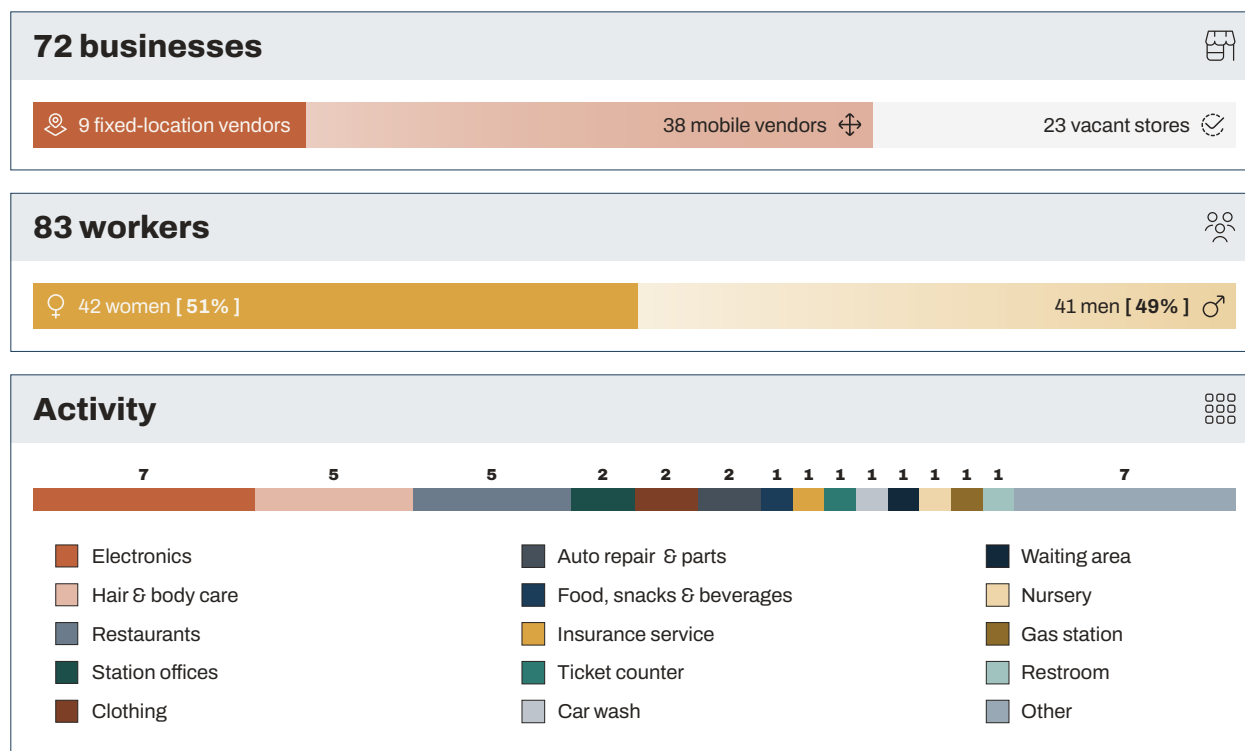
is responsible for employee management, maintenance, security, and relations with operators, unions, the private investor, and the police. This arrangement is classified in the study's typology as "Municipal ownership with private management"—a relatively clear division of roles, though the accountability lines between the municipality and the private agent managing the building are not always fully formalized.

Financial Model & Revenue Flows

Yaya Fofana has a distinctive ticketing model: passengers purchase tickets at a counter desk managed by the station manager, rather than paying operators directly. This is the only station in the study where money does not change hands directly between passengers and operators. Operators pay a daily parking fee of 1,000 FCFA (US\$1.70) per vehicle (applicable to vehicles with more than five seats; taxicabs are exempt), as well as a boarding charge equivalent to one individual fare per departure. The average fare is approximately 350–400 FCFA (US\$0.60–0.70). The station manager's estimated daily balance from transport operations is around 203,000 FCFA (US\$345.79). Commercial revenues—rents from the retail units—are collected separately by the private management agent, but with only half the units occupied, this income stream remains below its potential.

FIGURE 19

Commercial activity characteristics at Yaya Fofana station



Private Sector Participation

Private sector involvement at Yaya Fofana is more structured than at the Dakar stations. A private company was contracted by the Koumassi municipality to finance and build the commercial building, and now manages and earns rental revenues from it. Meanwhile, the station manager—appointed by the municipality—handles transport operations and ticketing. This creates a functional split between commercial and transport management, though the duration of the private building operator's contract is not fully specified in the available documents.

Key Findings

Yaya Fofana illustrates the potential of a municipality-led, privately-built station model to deliver meaningful service improvements: the ticketing counter system controls prices, reduces passenger-operator disputes, and introduces a degree of formalization. The station's physical condition is noticeably better than many of its peers. However, three concerns cloud this positive picture. First, the station's location—not on a major intersection and away from dense activity—limits its catchment area and contributes to low commercial occupancy, undermining financial sustainability. Second, the gender-sensitive shortcomings in facilities (toilets, lighting) point to gaps in inclusive design that need to be addressed. Third, the governance model, while clearer than at Colobane, still lacks fully formalized accountability between the municipality and the private building operator. Clarifying these contractual arrangements and addressing the commercial occupancy gap will be critical to the station's long-term viability.

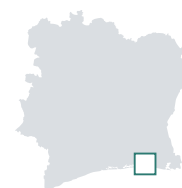


Yaya Fofana
station on a rainy
day in Abidjan

©
Transitec
Consulting
Engineers

Djéni Kobénan Station

[Abidjan, Côte d'Ivoire]



Station Profile

Djéni Kobénan station is located at an interchange on the North Highway (Autoroute du Nord) in Abidjan, on the boundary between the Adjamé and Agban municipalities. At 0.4 hectares, it is the smallest station in the study, and serves an exclusively paratransit clientele: gbakas (minibuses) and shared taxis, with no formal or contracted transport modes present. The station's origins are closely tied to a private opportunity: a neighboring fuel station owner invested in improvements—most notably the construction of enclosure walls—and benefits in return from privileged access and a close commercial relationship with paratransit operators. The station handles fewer than 1,000 vehicle entries per day, and its capacity is visibly exceeded: at peak hours, the plot and its immediate vicinity are fully congested, and around 140 vehicles per day board and drop off passengers on the curb just outside the station gates.

Infrastructure & Physical Conditions

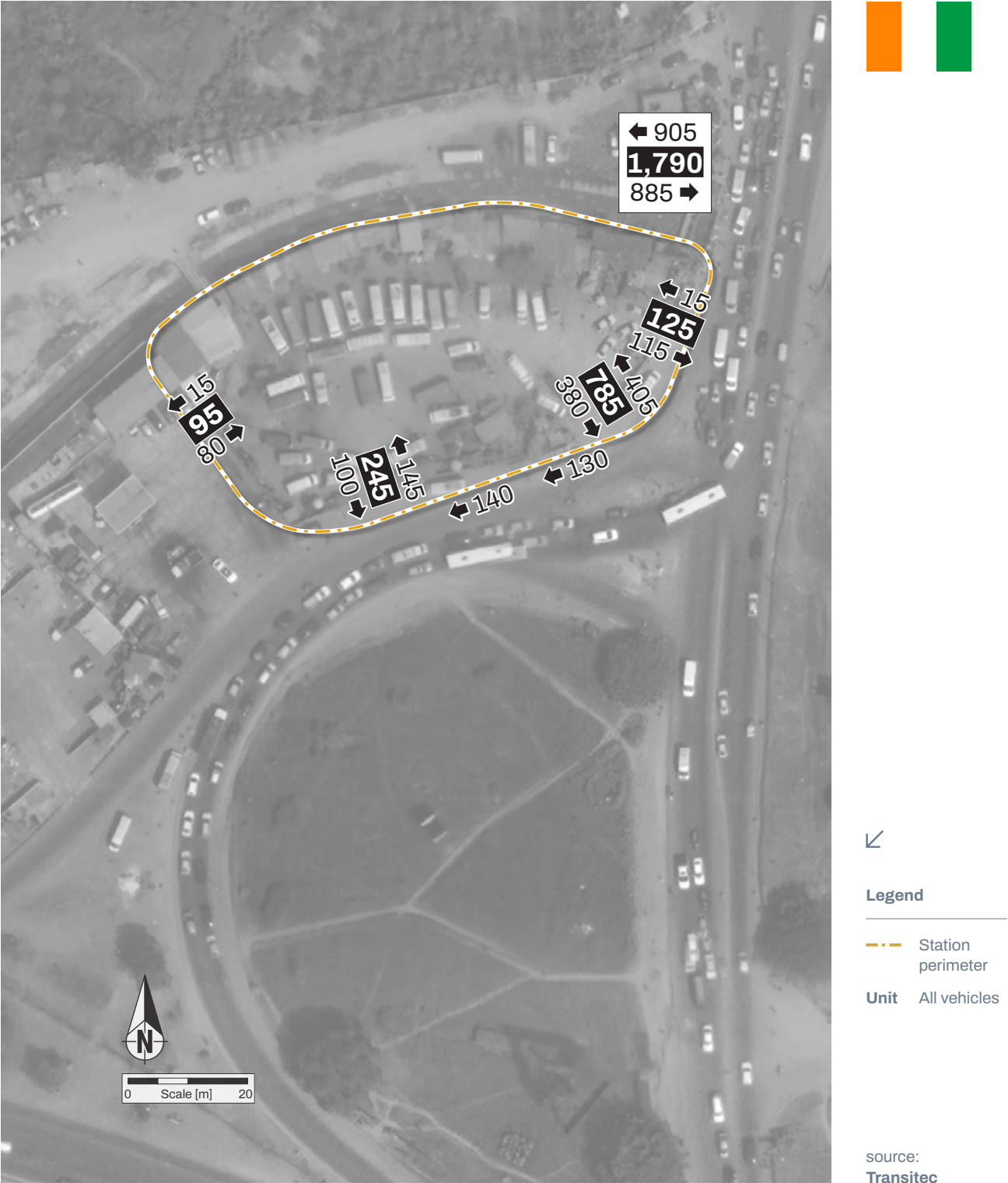
Physical conditions at Djéni Kobénan are poor. The ground is entirely unpaved, creating difficult conditions for pedestrians and vehicles alike in rainy weather, and heavy vehicle traffic has created potholes throughout the site. The station's inadequate size relative to demand forces vehicles to park on the curb, displacing pedestrians onto the road and raising road safety concerns in an area already traversed by high-speed motorway traffic. Most shops and counter desks are precarious structures; the only permanent concrete buildings are the station offices and toilets. A mosque also occupies a solid structure within the perimeter. The station is closed at night, though some vehicles remain parked after hours. There are four entry and exit points, one connecting directly to the adjacent fuel station.

Governance & Institutional Framework

The Côte d'Ivoire State is the formal land administrator, but the municipality delegates the maintenance and management of buildings to a private investor from the paratransit sector. Daily station operations are managed by a team—including security guards, managers, cleaners, and a business liaison officer—under the authority of a station manager named by mayoral decree. While

FIGURE 20

Daily vehicle flows entering and exiting Djéni Kobénan station [5AM to 12AM]



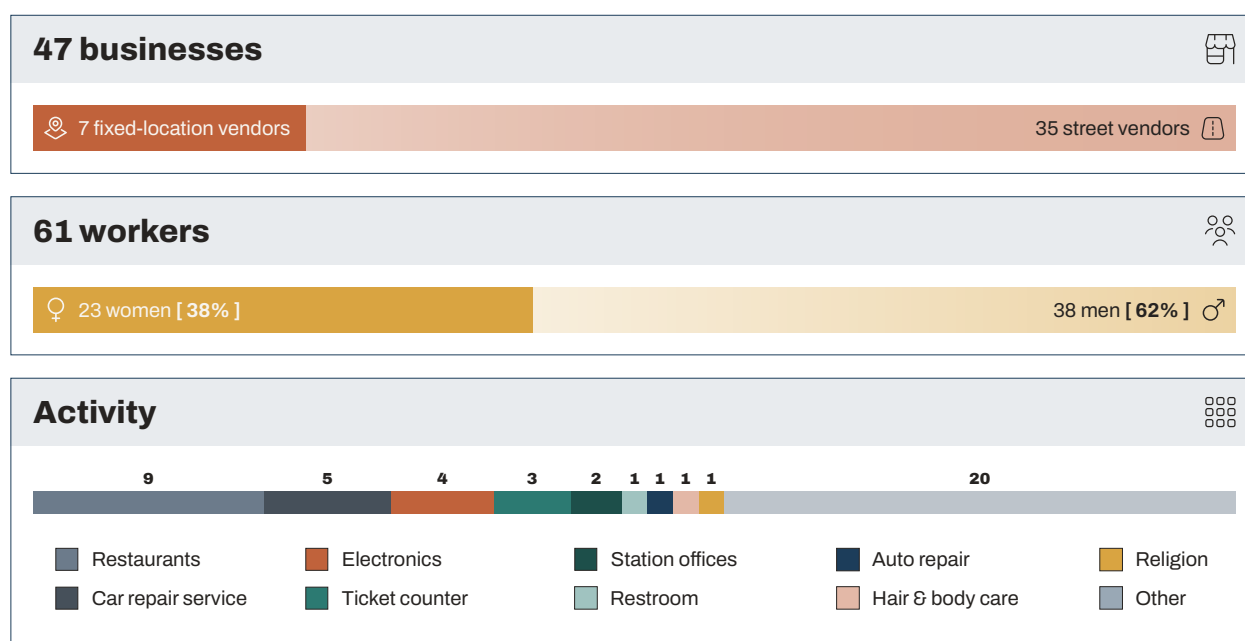
the station manager is not a salaried municipal employee, they are accountable to the municipality and authorized to occupy the public domain. The governance arrangement is relatively informal: no written agreements govern the relationship between the station manager and commercial operators, with interpersonal arrangements substituting for formal contracts. In the study's typology, Djéni Kobénan is classified as "Municipal ownership with private management."

Financial Model & Revenue Flows

Transport revenue is collected through two mechanisms: a daily parking fee of 1,000 FCFA (US\$1.70) per vehicle (for vehicles with more than five seats; taxicabs are exempt), and a boarding charge equivalent to the fare of one passenger per vehicle departure, at an average of approximately 350 FCFA (US\$0.60). The station manager's estimated daily balance from transport operations is around 250,000 FCFA (~ US\$425.88). Commercial activity generates no revenue for the station: shops and vendors operate freely on the plot without paying rent, subject only to an obligation to clean their portion of the parking area. Local taxes on commercial activity are collected directly by the municipality, entirely bypassing station management's financial flows.

FIGURE 21

Commercial activity characteristics at Djéni Kobénan station





Vehicles
waiting to load
at Djéni Kobénan
station in Abidjan

©
Transitec
Consulting
Engineers

Private Sector Participation

Private sector involvement at Djéni Kobénan is present but unstructured. The private building manager and the fuel station owner are the two main private actors, each operating on the basis of informal or bilateral arrangements rather than formal concession contracts. The station manager—though appointed by the municipality—effectively functions as a private operator, self-financing operations through fee collection and remitting no formal share to any public institution. The absence of written agreements with commercial occupants and the lack of commercial rent represent a significant missed revenue opportunity that the current private management model has not addressed.

Key Findings

Djéni Kobénan illustrates the risks of an infrastructure-poor, informally governed station operating beyond its physical capacity. Despite a favorable highway interchange location, the station's minimal footprint and unpaved surfaces create chronic congestion and road safety hazards, with a material share of vehicle operations spilling outside its boundaries. The financial model is constrained by the absence of commercial rent—businesses occupy space freely, and commercial tax revenues flow to the municipality rather than the station—leaving the station manager with limited resources to invest in improvements. The governance model, while partially institutionalized (there is a single identifiable public owner and an appointed manager), is undermined by its reliance on verbal arrangements and the absence of formalized accountability between the municipality, the private building manager, and commercial transport operators. Addressing these gaps—formalizing contracts, introducing commercial rent, and either expanding the physical footprint or enforcing strict capacity limits—would be prerequisite to any meaningful improvement in station performance.

Zimpeto Station

[Maputo, Mozambique]



Station Profile

Zimpeto station is a peri-urban station located approximately 19 km from Maputo's city center (30 to 60 minutes by car), within the Olympic Village complex that includes the National Stadium. It was inaugurated on the eve of the 2011 African Games and built by Empresa Municipal de Mobilidade e Estacionamento (EMME), a Maputo municipality company created to manage urban mobility and parking. At approximately 1 hectare, the station is flanked on either side by two shopping complexes and the commercial area immediately around the station is ten times larger than the transport infrastructure itself. The station primarily serves paratransit vehicles (urban and peri-urban routes), with some services extending to the provinces of Gaza and Inhambane. Approximately 2,200 vehicles enter and exit daily, and estimated daily passenger throughput is around 55,000—the highest figure among all stations in this study.

Infrastructure & Physical Conditions

Despite its relatively recent construction, Zimpeto's physical conditions have deteriorated significantly. The station has no asphalt, no designated boarding or waiting areas, and no maintenance or management plan for roads or other infrastructure. The roof structure is in disrepair, and designated passenger seating has been occupied by informal vendors. Spaces reserved for parking cars have similarly been encroached upon by vendors, creating disorder in vehicle flow and raising safety concerns at entry and exit points where pedestrians and vehicles share space. The access road has deteriorated markedly, with broken drainage infrastructure and unauthorized construction around the market perimeter blocking future expansion. The station is unable to accommodate all vehicles at peak times—particularly between 6 and 10am when queues for city-center routes are longest—and congestion spills into surrounding streets.

FIGURE 22
Daily vehicle flows entering and exiting Zimpeto station [Sample day: Monday, June 24th]



Legend

Station perimeter

Unit All vehicles

source:
Transitec

Governance & Institutional Framework

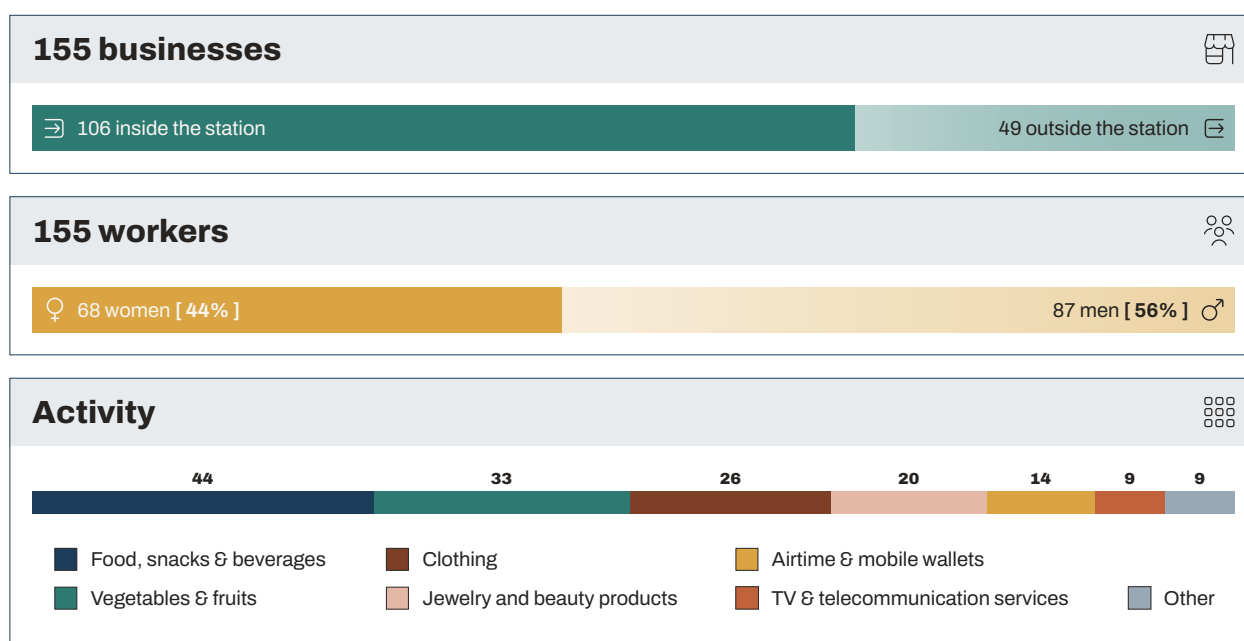
Zimpeto is managed by the local government through two institutions operating in parallel: EMME, which holds formal responsibility for station maintenance and investment, and the Maputo Municipal Police, which is located within the station and manages vehicle flow and parking fee collection in the morning hours. Transport associations play a central role in daily operations, organizing vehicle queues, managing passenger boarding (through *modjeiros*—informal passenger collectors paid per loaded vehicle), and collecting parking fees from operators. This multi-actor arrangement, with no single entity holding unified management authority, is classified in the study’s typology as “Institutional ownership with operators’ management.”

Financial Model & Revenue Flows

Revenue collection at Zimpeto is fragmented across multiple actors. The Municipal Police charges operators 20 Mozambican meticaïs (MT) per day (US\$0.44) for parking (collected until approximately 10am), after which transport associations collect an additional 50 MT per day (US\$1.09) per vehicle for parking rights. Market inspectors separately collect street vending fees of 10 MT (US\$0.22) from informal vendors. There is no boarding or departure charge. Total estimated daily transport-related income at station level is approximately US\$383, making it one of the lower-revenue stations in the study relative to its passenger volumes. The municipality collects commercial taxes on shops and businesses, but these flows bypass station management entirely.

FIGURE 23

Commercial activity characteristics at Zimpeto station





A bus exiting the
Zimpeto station
in Maputo

©
Transitec
Consulting
Engineers

Private Sector Participation

Private sector participation at Zimpeto is informal and association-led. Transport associations are the de facto private managers of daily operations—organizing queues, dispatching vehicles, and collecting fees—without any formal contract or performance obligation with the municipality. There is no private concessionaire or structured public-private partnership. EMME retains nominal management and investment responsibility but has not fulfilled this role in practice, as evidenced by the station’s physical deterioration since its opening. The result is a governance gap in which public institutions hold formal authority but delegate de facto control to associations operating informally.

Key Findings

Zimpeto presents a paradox: the highest estimated passenger throughput of any station in this study, yet one of the weakest governance and infrastructure profiles. The station’s rapid physical deterioration since 2011 reflects the absence of any active maintenance or investment program by EMME, whose responsibilities have not been matched by resources or accountability mechanisms. The fragmented fee collection model—split between the Municipal Police, transport associations, and market inspectors—generates limited revenue and provides no consolidated funding stream for reinvestment in the station. The central role of transport associations in daily operations, while practically necessary, is entirely informal and creates accountability gaps. Any reform pathway for Zimpeto will need to consolidate management authority under a single accountable entity, establish a clear investment program, and formalize the role of transport associations through a structured contractual arrangement.

Malhampsene Station

[Maputo, Mozambique]



Station Profile

Malhampsene station is a peri-urban station located approximately 22 km from Maputo's city center, extending some 300 to 400 meters along National Road 4, the main highway linking Mozambique to South Africa. The station was never formally established: it emerged clandestinely as paratransit vehicles began using a stretch of road alongside an existing municipal market, and its approximately 2.81 hectares have no fixed or clearly demarcated boundaries. It serves primarily urban paratransit routes toward Maputo city center, the Zimpeto market, Matola Gare, and surrounding areas. Around 1,500 vehicles use the station daily, with the heaviest flows concentrated between 5 and 10am.

Infrastructure & Physical Conditions

Malhampsene has no formal infrastructure. The ground is unpaved and becomes severely muddy during rain, making movement difficult for both pedestrians and vehicles. There is no fencing, no perimeter, no toilets, no wayfinding signage, no roofing over the boarding area, and no seating. Waste management is absent and rubbish accumulates on the ground. Vehicles enter and exit from both the north and south sides without formal gates, leading to chaotic movement patterns: vehicles frequently load passengers at exit points, blocking the flow of others. Informal vendors have occupied former waiting and parking areas. The only structures present are informal stalls and small grocery shops associated with the adjacent municipal market.

FIGURE 24
Daily vehicle flows entering and exiting Malhampsene station



Governance & Institutional Framework

Malhampsene has no institutional governance to speak of. Local government plays no active role in transport operations, security, investment, or maintenance—the station’s spontaneous existence is simply tolerated by public authorities without any formal recognition or intervention. The police are absent from the site. Transport associations have filled the governance vacuum by default, organizing vehicle queues, managing passenger boarding through *modjeiros*, and collecting daily parking fees from operators. Market inspectors from the adjacent municipal market collect vendor fees on the commercial side. In the study’s typology, Malhampsene is classified as “Operator management without institutional involvement”—the weakest governance model among the eight stations.

Financial Model & Revenue Flows

Revenue flows are entirely controlled by non-institutional actors. Transport associations charge operators 50 MT (US\$1.09) per vehicle per day in parking fees; these revenues fund the associations’ own operations and the *modjeiros*’ informal wages, with nothing remitted to the municipality. Market inspectors collect 10 MT (US\$0.22) per vendor per day for commercial activity on behalf of the adjacent market management, but these revenues are not channeled back into station infrastructure or transport operations. There are no boarding or departure fees. The municipality collects no direct income from station activity, formal or informal.



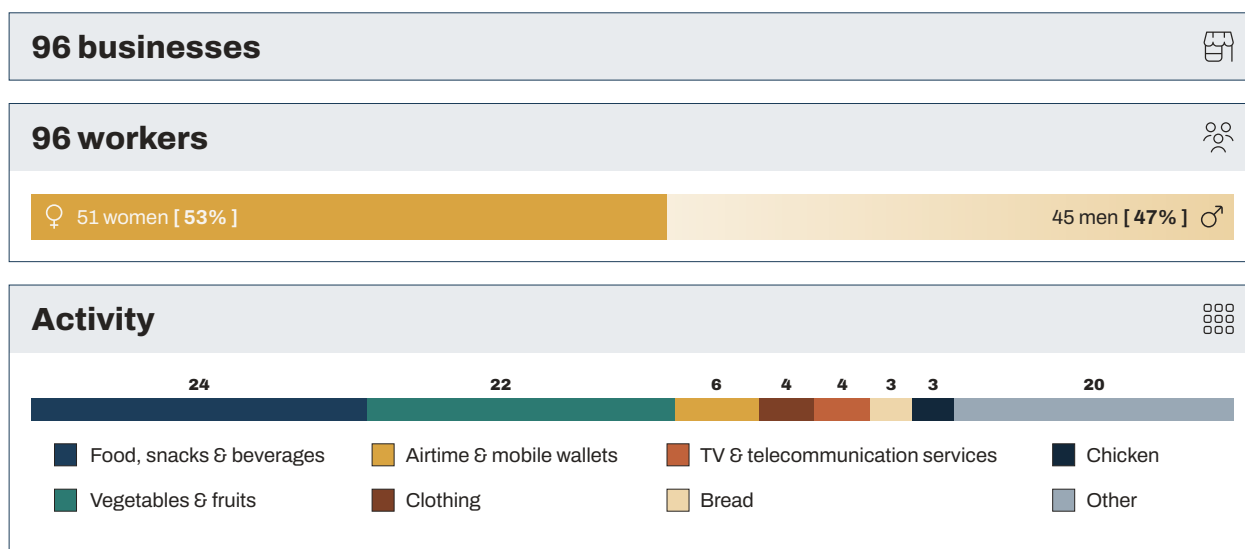
Vendors,
passengers,
and drivers at
Malhampsene bus
station in Maputo



©
Transitec
Consulting
Engineers

FIGURE 25

Commercial activity characteristics at Malhampsene station



Private Sector Participation

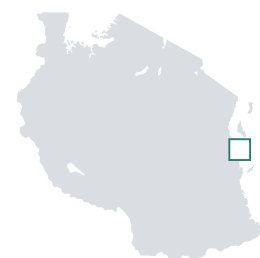
There is no structured private sector participation at Malhampsene. Transport associations are the de facto managers of the site, but operate entirely informally without contracts, concession agreements, or any performance framework. No private investor has taken an interest in the station's infrastructure, reflecting both the informal legal status of the site and the limited revenue potential of an entirely unstructured operation. All maintenance—such as it is—falls to the associations by default.

Key Findings

Malhampsene is the most informal station in this study and illustrates the outer limit of unmanaged public transport infrastructure: a heavily used site with around 1,500 vehicles per day that has never been formally recognized, planned, or invested in by any public authority. The complete absence of institutional involvement—no ownership claim, no investment, no security, no maintenance—means that all governance functions have been absorbed informally by transport associations, with predictable results: poor physical conditions, chaotic circulation, no passenger amenities, and no reinvestment mechanism. The contrast with Zimpeto—also governance-weak but at least formally established—is instructive: even minimal institutional recognition and investment create better baseline conditions. For Malhampsene, the first reform step would be formal recognition and boundary demarcation, followed by the establishment of a management authority with a mandate and resources to deliver basic infrastructure improvements.

Makumbusho Station

[Dar es Salaam, Tanzania]



Station Profile

Makumbusho station is an urban station located in the Kinondoni district of Dar es Salaam, approximately 8 km from the Kinondoni municipal offices. At approximately 0.9 hectare, it serves 23 routes—all within Dar es Salaam, with no intercity connections—and accommodates four transport modes: daladalas (minibuses), BRT, boda-bodas (motorcycles), and bajajis (tricycles). The station was modernized in 2014 through a public-private partnership between Kinondoni Municipality and a private partner, Eastern Capital Ltd, which resulted in the construction of a commercial complex (two four-storey blocks), a paved parking facility, and a mini market. The station operates 24 hours a day and handles approximately 2,425 vehicle entries and exits daily, with an estimated 53,400 passengers per day—among the highest in this study.

Infrastructure & Physical Conditions

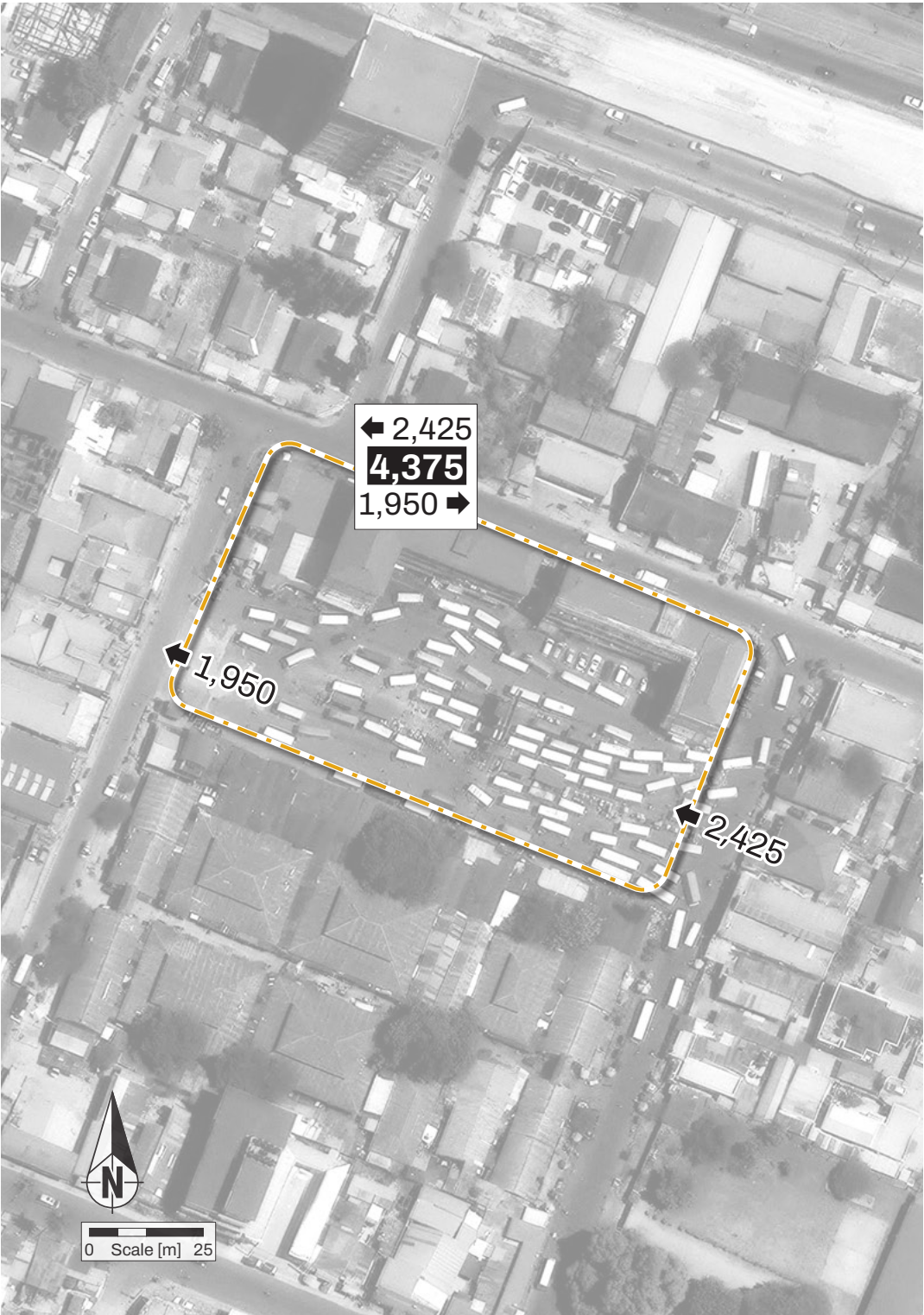
The commercial building is in good condition, but the wider station infrastructure has deteriorated significantly since its modernization. The paved parking yard is in an advanced state of deterioration and requires permanent maintenance that has not been forthcoming. The lighting system is non-functional, creating security concerns at night. Passenger shelters—four small structures for 6 to 10 people—have been occupied by mobile vendors. Toilet capacity is minimal relative to daily throughput. The pathway linking the two parking yards passes through the mini market, creating pedestrian-vehicle conflicts. During peak hours (5:30–9:30am and 5:30–6:30pm), the parking capacity is overwhelmed—104 buses were recorded entering in a single 30-minute peak period—forcing vehicles and passengers to load and alight outside the station boundaries.

Governance & Institutional Framework

Makumbusho operates under a formal public-private partnership between Kinondoni Municipality and Eastern Capital Ltd. The private partner manages the commercial building, oversees maintenance, cleaning, security, and utilities for both the building and the parking yard. The municipality collects

FIGURE 26

Daily vehicle flows entering and exiting Makumbusho station [5.30AM to 9.30PM]



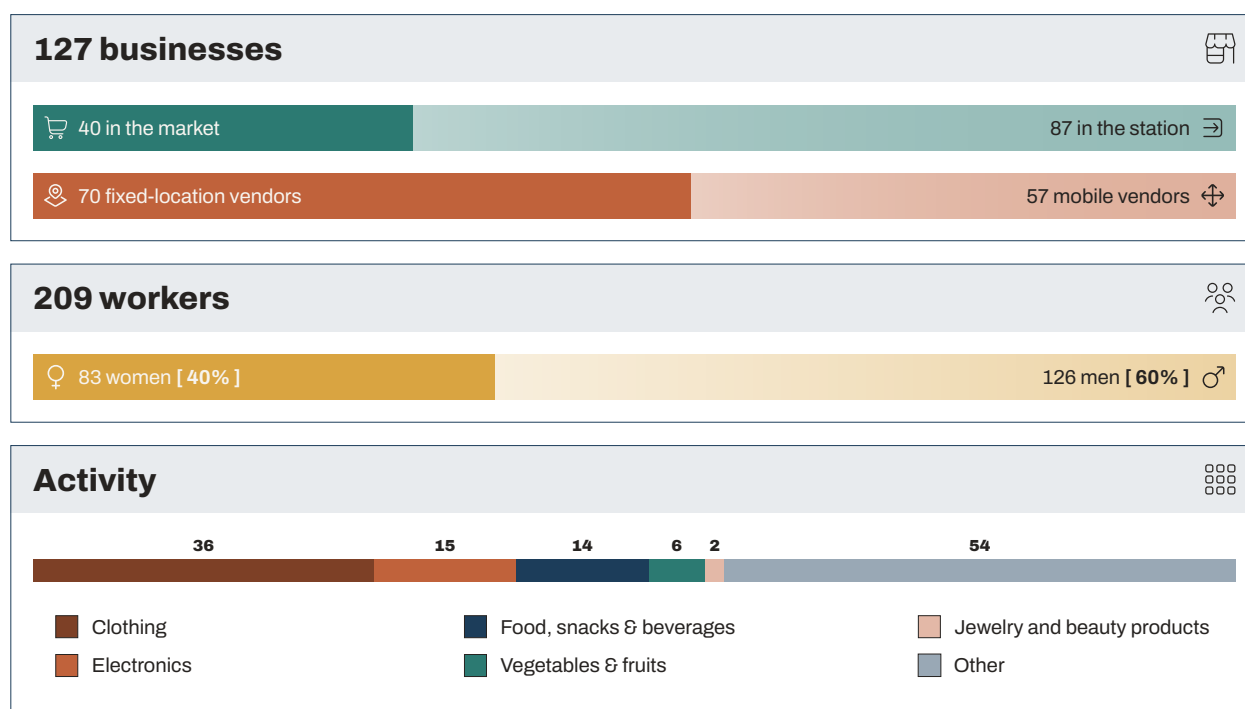
parking fees from operators and trading taxes from mini market vendors, and retains ownership of the land and transport infrastructure. Transport associations (principally UWAMATEBO) contribute to vehicle organization, managing the “first-come, first-served” dispatch queue. The City Police is responsible for removing informal vendors inside and around the station. In the study’s typology, this model is classified as “Institutional ownership with private management”—comparable to Baux Maraîchers, though with a more complex revenue-sharing arrangement.

Financial Model & Revenue Flows

Revenue flows are divided between the municipality and the private partner under a formal profit-sharing agreement. Commercial building net profits are split 85% to Eastern Capital Ltd and 15% to the municipality; parking fee revenues are split 75% to the municipality and 25% to the private partner. Operators pay 1,000 Tanzanian shillings (TZS) (US\$0.37) per bus per day in parking fees to the municipality, and an additional 1,000 TZS per trip to UWAMATEBO (500 TZS (US\$0.18) for non-members). Mini market vendors pay a trading tax of 10 TZS (US\$0.004) per day to the municipality. The revenue-sharing model is formal and contractually specified, distinguishing Makumbusho from stations where financial arrangements are informal.

FIGURE 27

Commercial activity characteristics at Makumbusho station





Small transport
interchange
near the Kimara
Mwisho station in
Dar es Salaam

©
Transitec
Consulting
Engineers

Private Sector Participation

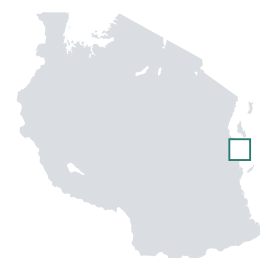
Eastern Capital Ltd represents the most structured private sector participation in the Tanzanian stations. Operating under a multi-year contract with Kinondoni Municipality, the company is responsible for commercial premises management, rent collection, maintenance, cleaning, and security across the whole site. The contract includes explicit revenue-sharing ratios, giving it a level of formalization absent in most other stations in this study. However, the private partner's obligations have not translated into adequate upkeep of the parking infrastructure, suggesting that maintenance responsibilities need to be more precisely specified and enforced in the contract.

Key Findings

Makumbusho illustrates both the promise and the limitations of public-private partnerships in bus station management. The 2014 modernization delivered meaningful improvements—a formal commercial complex, paved parking, and a structured revenue-sharing arrangement—but the station's physical condition has deteriorated substantially since then, pointing to a failure of the maintenance obligation. The revenue-sharing model is one of the most clearly specified in the study, yet the municipality's share of commercial profits (15%) is low relative to its ownership and regulatory responsibilities. The station's high throughput (53,400 passengers/day) is managed under persistent congestion, with peak-hour demand significantly exceeding the station's physical capacity. Strengthening the private partner's contractual maintenance obligations, revisiting the revenue-sharing ratios, and investing in parking yard rehabilitation and lighting would be the most immediate priorities for improvement.

Mbezi Station

[Dar es Salaam, Tanzania]



Station Profile

Mbezi station is located in the Mbezi ward of Ubungo District, Dar es Salaam, adjacent to the Dar es Salaam–Morogoro–Iringa highway. It serves as an intermodal hub, connecting paratransit services with the BRT network. The station occupies a total area of approximately 2.3 hectares, comprising an upper parking yard, a lower parking yard, and a small market. It was developed by the Tanzania National Roads Agency (TANROADS) on road reserve land, which progressively expanded and upgraded the site by adding a paved upper parking yard, passenger shelters, lavatories, lighting, and perimeter fencing. The station serves 34 routes, all within Dar es Salaam, accommodating daladalas, BRT, boda-bodas, and bajajis. Approximately 1,400 vehicles enter and exit daily—96% paratransit—and estimated daily passenger throughput is around 34,500.

Infrastructure & Physical Conditions

The upper parking yard is in good condition and well maintained, with an office, toilet facilities, and paved surfaces. The lower parking yard, however, is on lateritic soil and requires ongoing maintenance that has not been consistently provided. The mini market between the two yards is composed of fixed wooden stands and creates pedestrian-vehicle conflicts, as the only pathway connecting the two yards passes through it. Lavatories capacity is minimal relative to daily throughput. During off-peak hours (11am–3pm), queues of buses at the upper yard entrance force passengers to board and alight outside the station. Boda-bodas and bajajis, concentrated in the lower yard, generate additional congestion that interferes with other public transport operations.

FIGURE 28

Daily vehicle flows entering and exiting Mbezi station



Legend

Station perimeter

Unit All vehicles

source:
Transitec

Governance & Institutional Framework

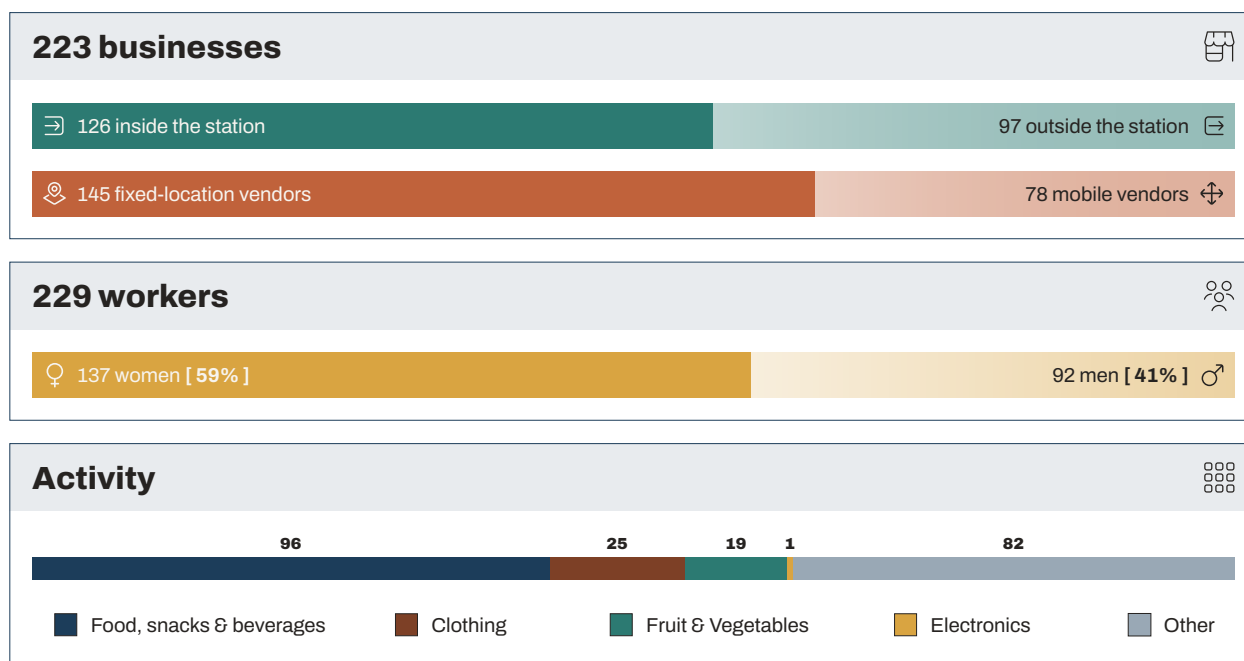
Mbezi has a more clearly delineated institutional governance structure than most stations in this study. TANROADS, through its Dar es Salaam regional office, manages the station, collects parking fees, and is responsible for parking yard maintenance. The minimarket at Mbezi is managed directly by the municipality, which collects trading taxes from the vendors. The drivers' association UMAMADARMS contributes to vehicle organization, maintaining the “first-come, first-served” dispatch system. The municipality collects trading taxes from mini market vendors. In the study's typology, this arrangement is classified as “Institutional ownership with private management”—the same model as Makumbusho and Baux Maraîchers, though with TANROADS rather than the municipality as the primary institutional manager.

Financial Model & Revenue Flows

Revenue flows are formally divided between public and private actors under the same contract structure as Makumbusho. Operators pay 1,000 TZS per vehicle per day in parking fees to TANROADS, and an additional 1,000 TZS per trip to UMAMADARMS (500 TZS for non-members). Commercial building net profits are split 85% to Eastern Capital Ltd and 15% to the municipality; parking fee revenues are split 75% to the municipality and 25% to the private partner. Mini market vendors pay a trading tax of 10 TZS per day to the municipality. Toilet fees (200 TZS (US\$0.07) per use) represent a minor additional revenue stream.

FIGURE 29

Commercial activity characteristics at Mbezi station





Shops at the
Mbezi station in
Dar Es Salaam

©
Transitec
Consulting
Engineers

Private Sector Participation

As at Makumbusho, Eastern Capital Ltd is the private partner responsible for commercial premises management, cleaning, security, and utility payments across the site. The contract structure and revenue-sharing ratios are identical to those at Makumbusho, suggesting a standardized model applied by Kinondoni Municipality across its station portfolio. TANROADS's direct involvement in infrastructure development and parking management distinguishes Mbezi from the other Tanzanian station: the national roads agency has played a more active role in physical investment than the municipalities typically do, resulting in better baseline infrastructure conditions—particularly in the upper parking yard.

Key Findings

Mbezi illustrates how a clearer institutional mandate—with a national infrastructure agency (TANROADS) directly responsible for physical development and maintenance—can produce better baseline infrastructure conditions than municipality-led models where maintenance obligations are delegated informally. The upper parking yard stands out as one of the better-maintained transport spaces among the eight stations. However, the same structural tensions observed at Makumbusho persist here: the lower parking yard is deteriorating, peak-hour congestion forces operations outside the station boundaries, and the private partner's 85% share of commercial profits sits in tension with the public sector's ownership and infrastructure investment obligations. The co-existence of two institutional actors with overlapping responsibilities—TANROADS and Kinondoni Municipality—also creates coordination risks that are not fully resolved by the current contract arrangements.

SSATP Working Paper

IMPROVING THE PERFORMANCE OF BUS STATIONS IN AFRICAN CITIES

**Institutional Frameworks and
Private Sector Participation Models**

