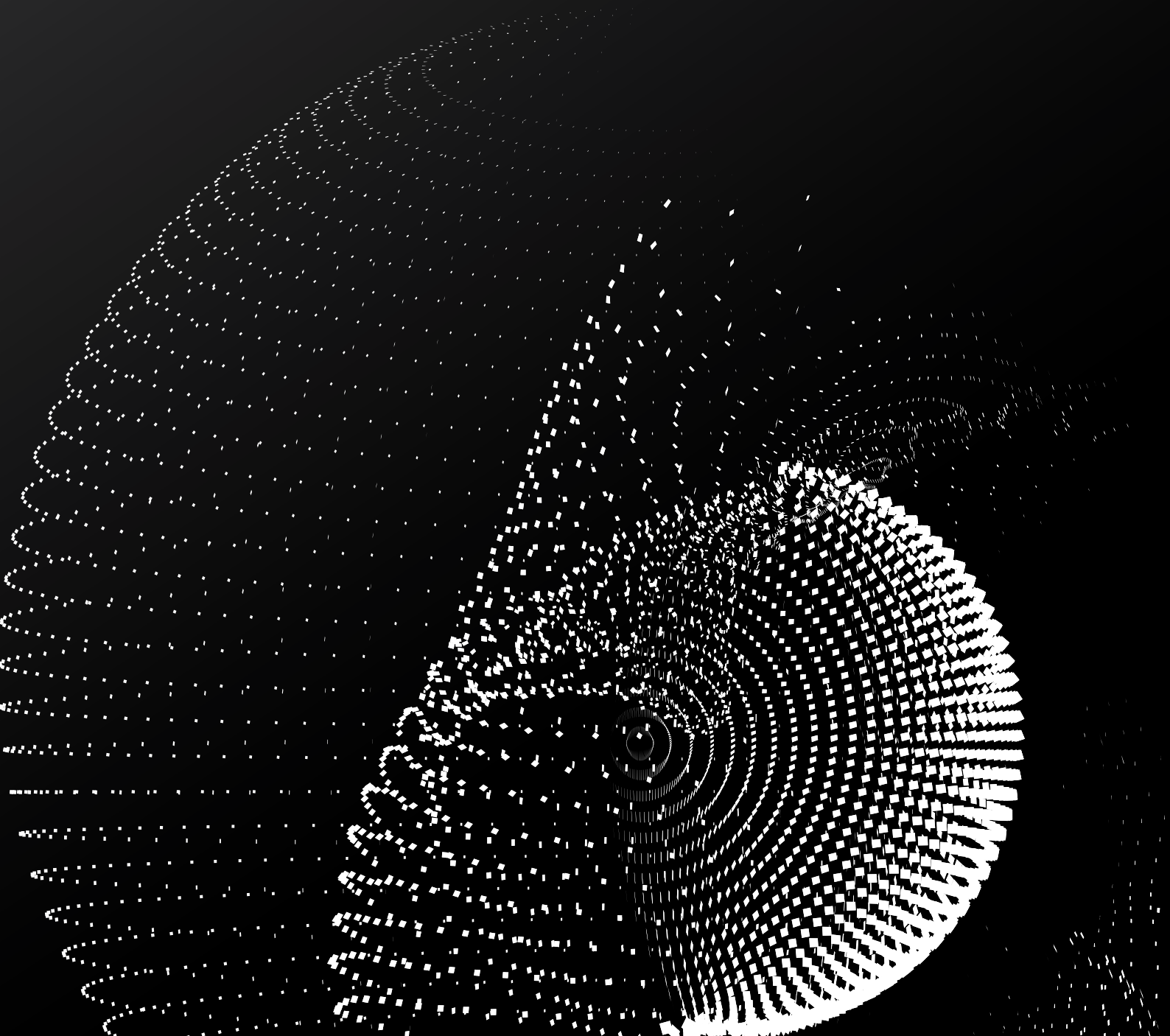
Heirs Technologies

Africa's Digital Leap: Cloud, Connectivity & AI in the Next Decade

An industry report on Africa's digital transformation



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Foreword

Africa is not at the edge of a digital leap, we are already mid-flight. Across the continent, a fundamental shift is taking place: cloud computing is transforming how institutions function; artificial intelligence is unlocking new levels of productivity and insights; and high-speed connectivity is bridging the physical and digital divide on an unprecedented scale.

This moment offers both promise and responsibility. The next decade will be defined not only by the technologies we embrace but also by how boldly and inclusively we implement them. Our ability to utilise these tools to solve local challenges, empower people/communities, and foster sustainable economic growth will determine whether Africa truly reaches its potential as a digital powerhouse.

What's clear is that this is not a moment for incremental change. It is a time for decisive investment in infrastructure, in talent, and in policies that catalyse innovation while safeguarding the future. Governments must lead with vision. Businesses must partner with intent. And the technology ecosystem must develop with humility, inclusion, and a focus on the long term.

This report offers a glimpse into Africa's digital future and a guide for those eager to influence it. From the emergence of sovereign cloud strategies to the development of AI-powered governance and the redesign of connectivity models for remote and rural inclusion, it highlights both the scale of the challenge and the urgency of the opportunity.

At Heirs Technologies, we are honoured to contribute to this dialogue and to play our part in enabling Africa's digital transformation. However, this journey belongs to all of us. It will require collective leadership, local innovation, and unwavering belief in Africa's ability to progress not through imitation, but by design.

Obong Idiong

CEO, Heirs Technologies

Executive Summary.

Africa's digital economy is approaching a critical inflection point that could define the continent's next decade, propelled by an accelerating convergence of artificial intelligence (AI), cloud solutions, and mobile connectivity. Yet, this transformation is not uniform. Despite accounting for nearly 19% of the world's population, Africa holds less than 1% of global data center capacity, underscoring a persistent infrastructure gap that requires targeted investments, regulatory readiness, and focused talent development to resolve.

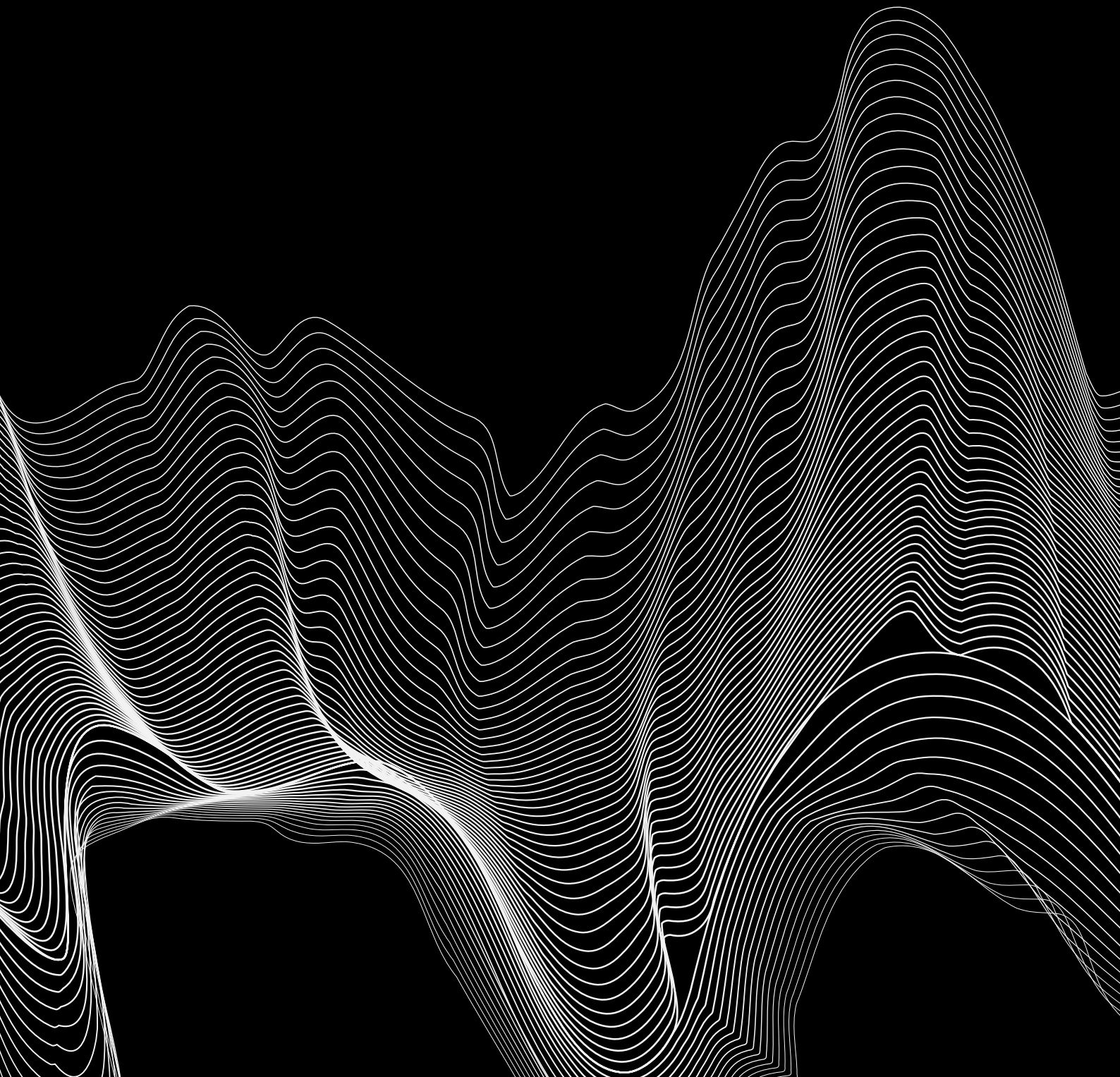
Cloud adoption is rapidly advancing, with 55% of African enterprises now running more than half of their workloads in the cloud and 17% being fully cloud-native. This progress, however, remains uneven, with Southern and West Africa leading while North Africa lags due to regulatory and infrastructure challenges. To address this, leading economies, including Nigeria, Kenya, and South Africa, are making strategic investments in digital infrastructure. These efforts are amplified by the expanding presence of major hyperscalers like AWS, Microsoft Azure, and Google Cloud, and landmark projects such as the 2Africa subsea cable, which is set to triple the continent's international internet capacity and lay the groundwork for a robust digital backbone.

The competitive landscape is currently defined by the dominance of global hyperscalers, whose scale and service breadth far outpace local providers. Faced with high operational costs and regulatory hurdles, many local players are finding collaboration a more viable path than direct competition. This dynamic is driving a wave of partnerships, while enterprises increasingly embrace hybrid cloud strategies to balance strict regulatory compliance with the need for agility and scale. Looking ahead, this trend is likely to spur significant mergers and acquisitions as data sovereignty laws tighten and the demand for local infrastructure grows.

In parallel, Africa's AI market valued at $4.5 billion in 2025 represents just 1.85% of the global market share, despite widespread policy ambition. While over 20 countries have drafted or launched national AI strategies, most remain in the "AI emergents" stage with significant execution gaps. Still, pockets of powerful innovation are emerging. Small Language Models (SLMs) are enabling lightweight, resource-efficient AI deployments in critical sectors such as agriculture, healthcare, and education.

These advancements are set against a backdrop of imbalanced investment. Between 2019 and Q1 2025, AI startups in Africa raised $1.25 billion, but 87% of this capital was concentrated in South Africa, Nigeria, Kenya, and Egypt. If these capital flows can be broadened and aligned with policy, the rewards are immense. The digital economy is projected to contribute up to $180 billion to the continent's GDP by 2025, while AI and related technologies could add as much as $2.9 trillion to Africa's economic output by 2030. As Africa enters its next digital decade, its future depends not only on deploying capital and technology, but on deliberate coordination. Infrastructure, policy, and funding ecosystems must align to unlock scalable and inclusive growth.

01. Introduction



01. Introduction

Africa's digital economy is entering a phase of rapid transformation, but this growth is both uneven and fragile. The continent stands at a pivotal moment where its vast potential is constrained by a critical infrastructure deficit. Despite being home to nearly 19% of the global population, Africa holds less than 1% of the world's data center capacity. This stark imbalance is the central challenge hindering the continent's digital leap and underscores an urgent need for strategic investment and policy alignment.

The stakes for resolving this are immense. Projections suggest that Artificial Intelligence (AI) and emerging technologies could contribute as much as $2.9 trillion to Africa's economic growth by 2030. On a more immediate timeline, the continent's digital economy is on track to contribute up to $180 billion to GDP by 2025, a significant rise from $100 billion in 2019. The trajectory of this growth highlights the transformative power of digital adoption, but realising these projections is entirely dependent on building a robust foundation.

Figure 1: Africa's Digital Economy Potential

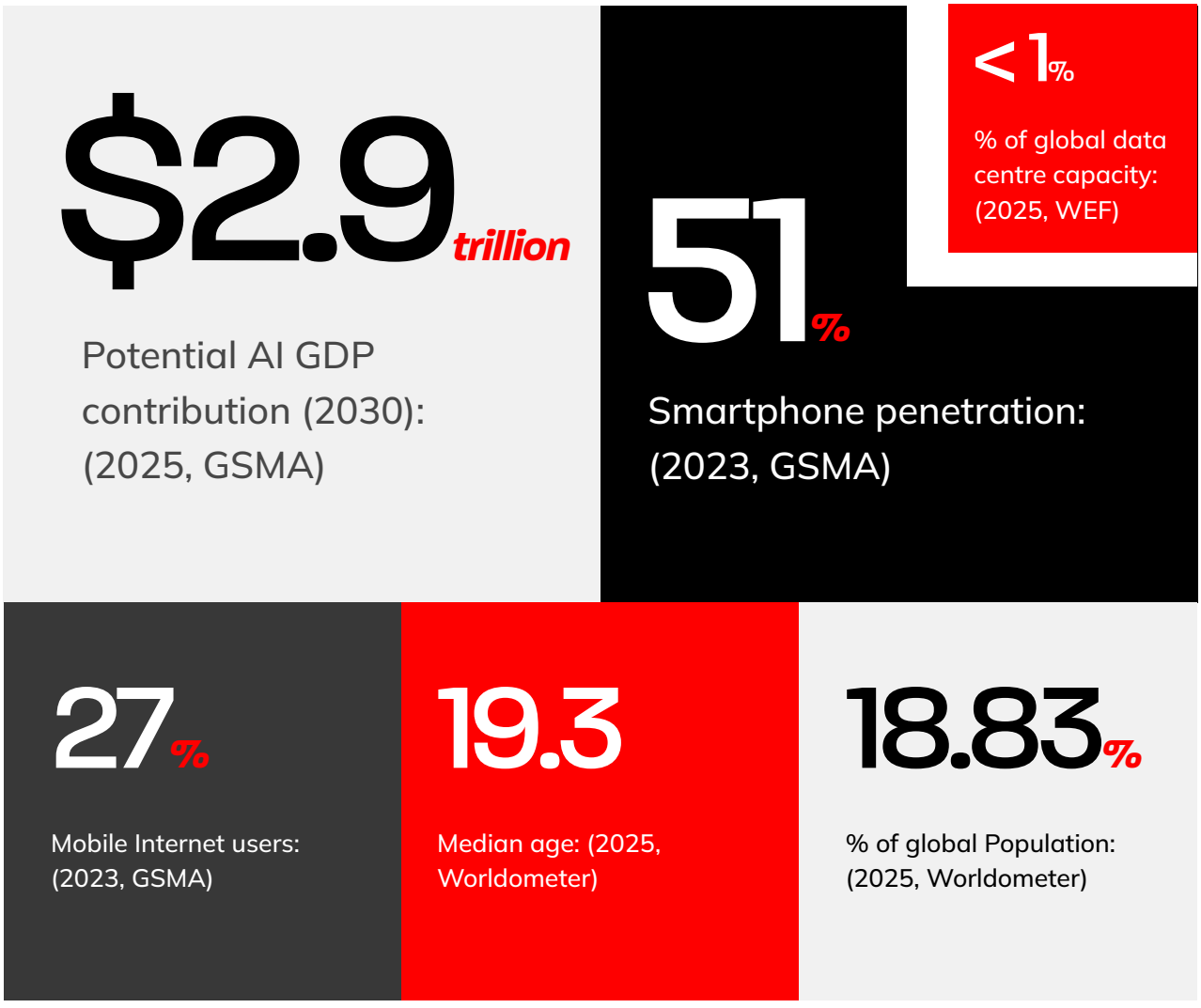
Source: (International Finance Corporation) | Google

Year	Digital Economy GDP (USD, Billion)	% of GDP	Total GDP (USD, Billion)
2019	100	3.9%	2580
2020	115	4.5%	2554
2021	132	4.8%	2744
2022	146	4.9%	2980
2023	160	5.1%	3145
2024	164	5.3%	3101
2025	180	5.5%	3446

At the heart of this shift are Artificial Intelligence (AI) and Digital Infrastructure, two key enablers powering innovation and inclusive development across the continent. The drivers for adoption are clear: a young, digitally inclined population, rising mobile and internet penetration, and a pressing need for scalable, locally-adapted solutions are reshaping entire industries.
As digital technologies become increasingly integrated into everyday life from mobile payments and e-commerce to telehealth and logistics, Africa's digital ecosystem is reshaping both formal and informal economic sectors at an accelerating pace.

However, the infrastructure gap is compounded by other key hurdles, including limited access to compute, disparities in regulatory readiness, data governance issues, and an underdeveloped AI talent pipeline. In response, pan-African strategies like the African Union's Digital Transformation Strategy for Africa 2020–2030 are being implemented to bridge these gaps in connectivity, data sovereignty, and AI regulation, setting the stage for the critical analysis that follows in this report.

Infographic - Key Stats, Africa



1.1. The Digital Transformation Imperative in Africa

Countries like Nigeria, Kenya, South Africa and more recently Morocco and Ghana, are leading transformative investments in digital infrastructure, hosting hyperscaler landing zones, regional cloud facilities and critical subsea cable projects that are building the continent's digital backbone. For instance, Equinix has committed over $460m in Nigeria and South Africa since 2022. Complementing these foundational efforts, hyperscale giants continue to strategically expand their cloud footprints across Africa, signifying deepening digital investment. Beyond their pioneering launches in South Africa, Microsoft Azure established cloud regions in Cape Town and Johannesburg (2019), and Amazon Web Services (AWS) launched in Cape Town region (2020). More recently, Google Cloud officially inaugurated its first African cloud region in Johannesburg in January 2024, marking a significant milestone. Furthermore, Oracle Cloud has announced plans for a public cloud region in Kenya and two cloud regions in Morocco (2024), underscoring a multi-faceted expansion across the continent. Crucially, the 2Africa subsea cable project, led by Meta in partnership with African and global operators, has seen significant progress, with segments between South Africa and Kenya. This colossal infrastructure will ultimately increase Africa's international internet capacity by three times the total capacity of all subsea cables serving the continent prior to its deployment.

1.2. Objectives of the report

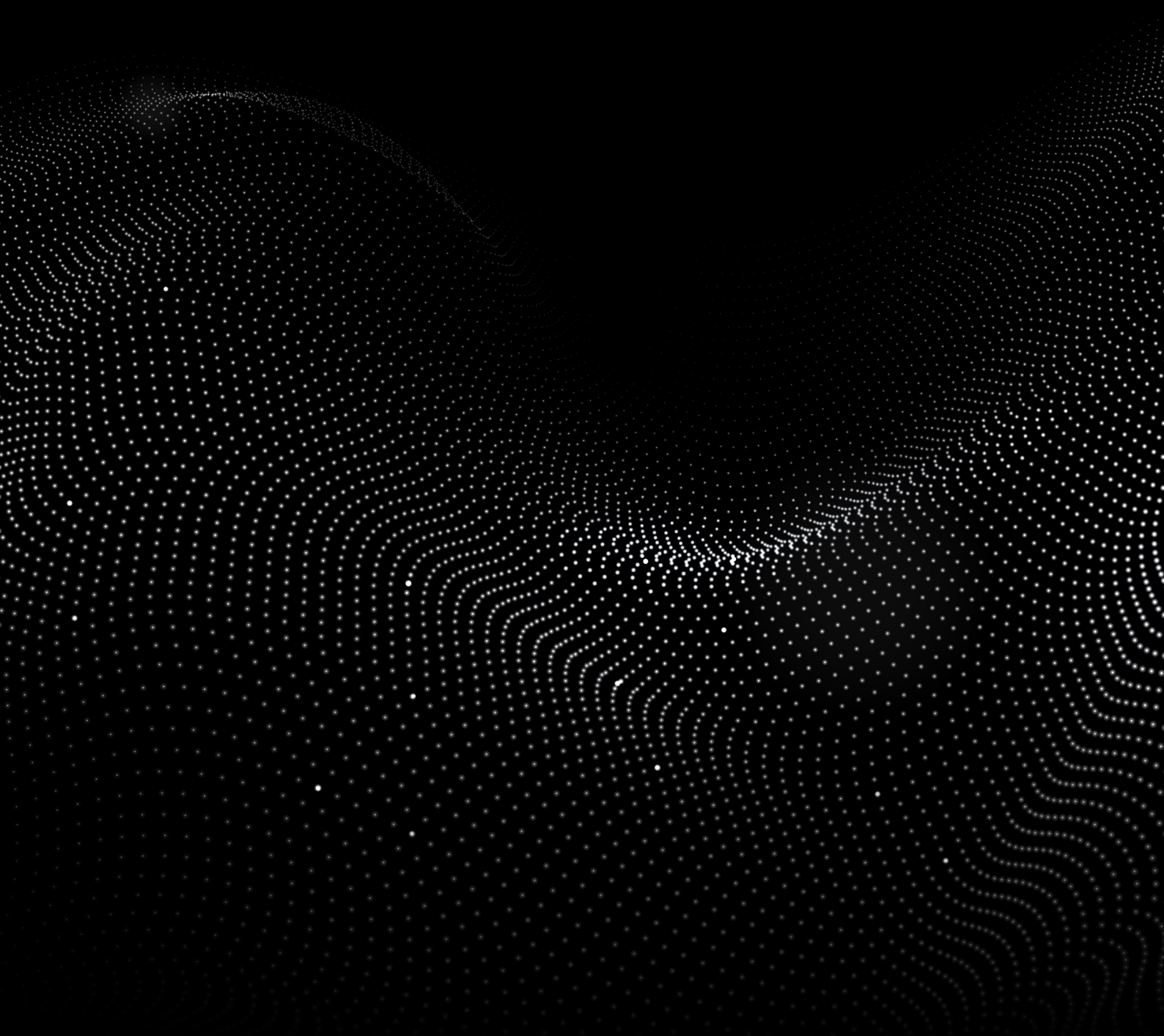
The overarching objective of this report is to explore the current state and future trajectory of Africa's digital transformation, with a sharp focus on three catalytic domains: Digital Infrastructure, Cloud Computing, and Artificial Intelligence (AI).

Precisely, the report seeks to:

- Provide an overview of Africa's digital economy, with a focus on digital infrastructure, cloud, connectivity, and artificial intelligence (AI) as core enablers of economic growth, innovation, and inclusive development.
- Benchmark cloud maturity and adoption across African regions and key markets
- Identify and map evolving ecosystem players including hyperscalers, local cloud providers, AI startups, and infrastructure investors
- Analyse startup and investment trends within the AI ecosystem, spotlighting capital flows, investor dynamics, and regional disparities
- Offer forward-looking insights on infrastructure priorities, policy harmonisation, and investment opportunities to guide policymakers, investors, and technology leaders in shaping Africa's digital future.

02.

Cloud Maturity & Adoption in Africa



02. Cloud Maturity & Adoption in Africa

Cloud computing is no longer a distant frontier for Africa, it is an active battleground for digital transformation.

"Cloud is not something in the air, in the sky. It is actually a physical server sitting in a data center somewhere in the world."

Wole Abu, MD, Equinix West Africa

From financial services in Lagos to mobile operators in Nairobi, digital ID systems in Kigali, hyperscaler infrastructure in Cairo, and emerging tech clusters in Casablanca, the continent is steadily embracing the cloud as a foundation for modernisation, scalability, and competitive agility.

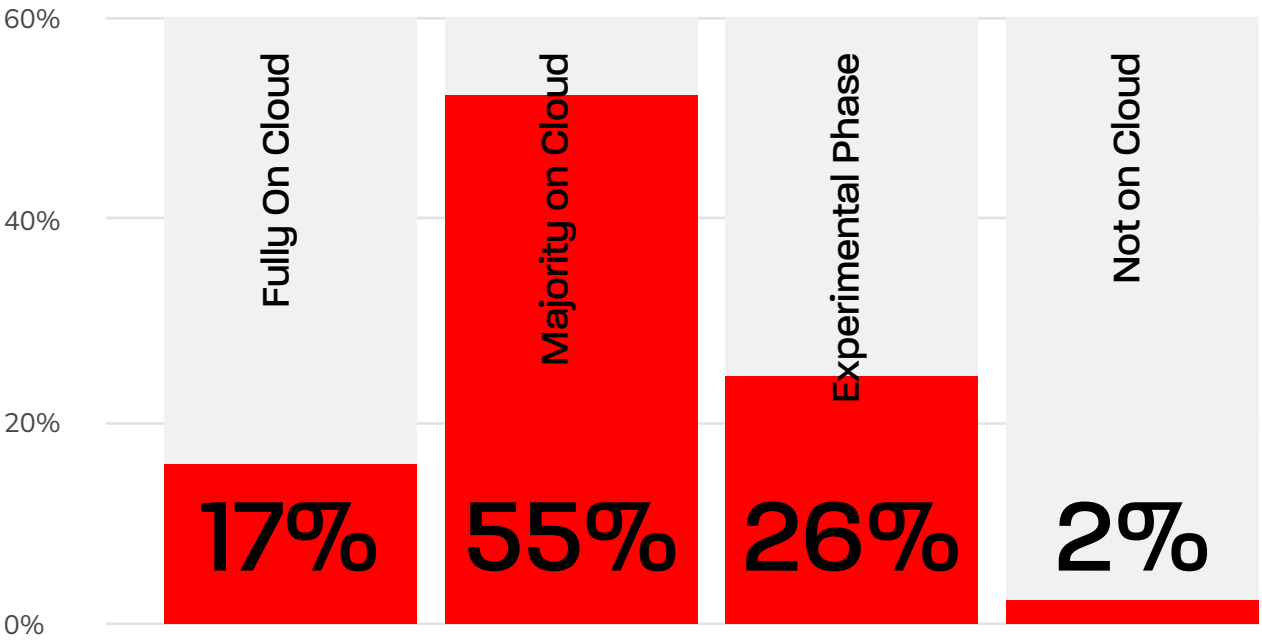
This momentum is underpinned by real infrastructure gains. Cairo hosts cloud zones from Microsoft and AWS Cairo is supported by Orange Maroc and national AI infrastructure plans. Johannesburg and Cape Town are home to Africa's first hyperscale data centers from AWS, Microsoft Azure, and Teraco. Lagos has MainOne's (Equinix) and Rack Centre's facilities. Nairobi is powered by Liquid Intelligent Technologies, Safaricom's cloud platform. Driving this momentum further is Open Access Data Centres (OADC), a Pan-African operator delivering neutral, world-class data center infrastructure across Africa—funded by the International Finance Corporation (IFC). These physical backbones paired with fintech growth, public sector digitisation, and increasing multi cloud deployments are accelerating cloud adoption across regions. But while the progress is encouraging, the landscape remains uneven, defined by sharp contrasts in infrastructure quality, regulatory clarity, market maturity, and overall cloud readiness.

2.1 Overview of Africa's Cloud Infrastructure Penetration Growth

Two recent surveys from McKinsey and PwC provide a valuable window into the continent's cloud maturity. This momentum is confirmed by recent data from McKinsey, which quantifies the shift. 55% of the continent's enterprises now run a majority of their workloads in the cloud, and an additional 17% are fully cloud-native. Only 2% of firms remain entirely off the cloud, a signal that the technology is firmly taking root across key sectors.

Cloud Adoption in Africa

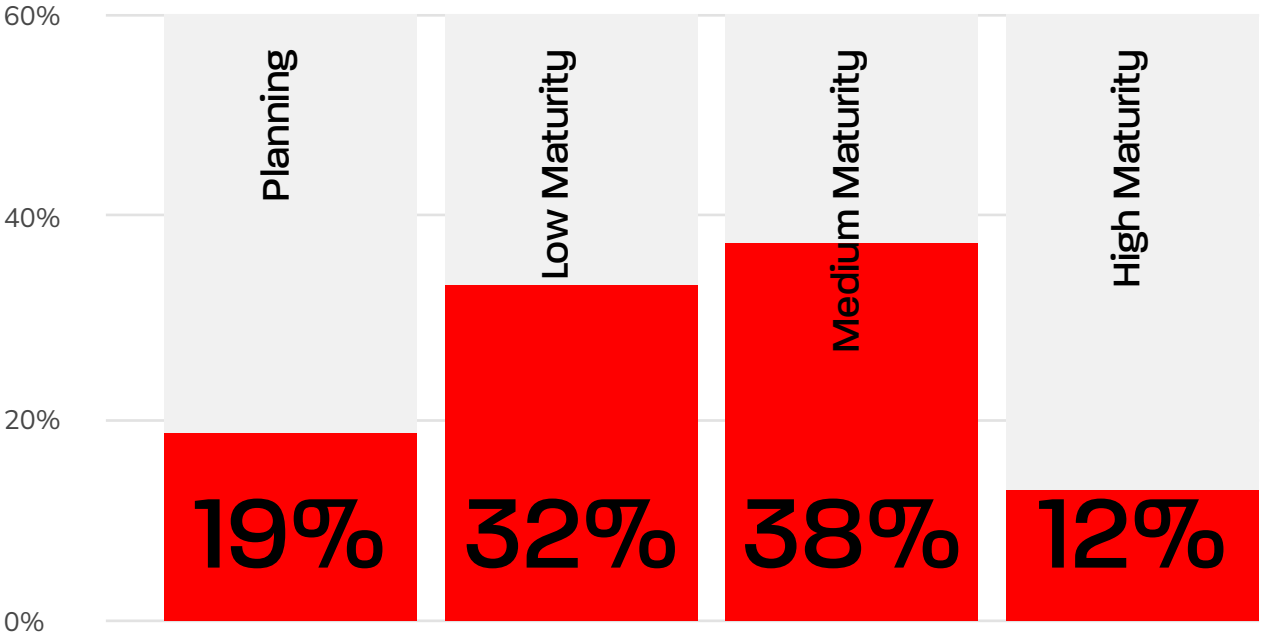
Source: McKinsey



These findings are echoed by PwC, which paints a similarly encouraging picture of cloud maturity in Africa-38% of companies report medium maturity with cloud embedded across many business units, 12% describe themselves as "high maturity" fully scaled on cloud infrastructure, and only 19% remain in the planning or early exploration phase.

Cloud maturity in Africa

Source: PWC



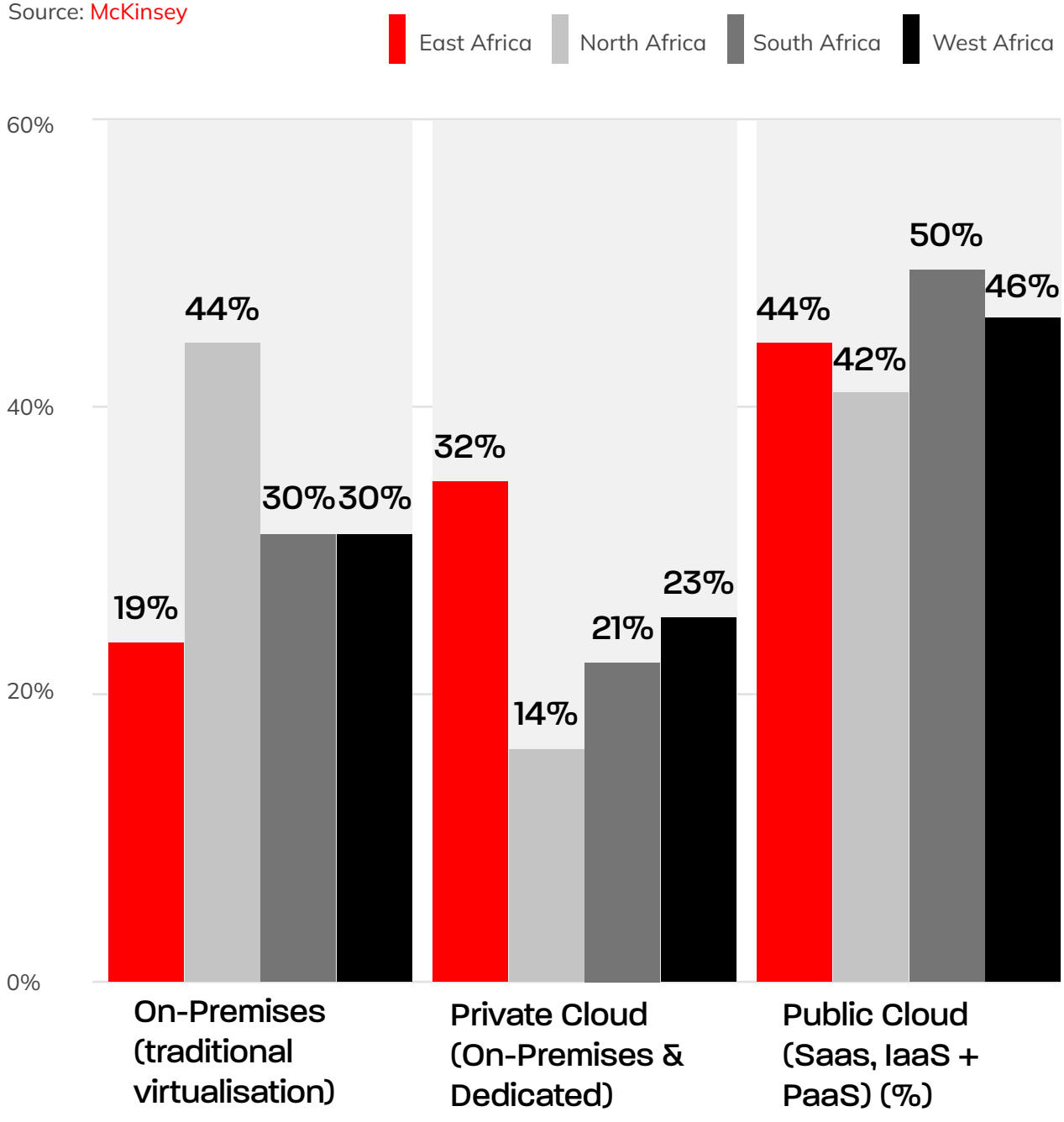
This convergence in findings affirms a growing reality of cloud adoption in Africa is no longer experimental, it is strategic.

Regional Patterns

While the overall trend is positive, regional differences in cloud adoption tell a more nuanced story. McKinsey's analysis of average cloud workload composition reveals clear contrasts between regions. Southern Africa leads in public cloud adoption (50%), driven by stronger infrastructure, local data center presence, and enterprise maturity especially in South Africa. West Africa, led by Nigeria and Ghana, is not far behind (46%), with telcos, banks, and digital startups leveraging cloud to scale operations and reduce CapEx. East Africa, particularly Kenya, shows a high blend of private and public cloud adoption, a sign of experimentation and hybrid strategies taking hold. North Africa lags in cloud transformation, with 44% of workloads still hosted on-premises, indicating both infrastructural and regulatory inertia.

Average Cloud Workload Composition by African Region

Source: McKinsey



2.2. Cloud players and ecosystem trends

Africa's cloud ecosystem is steadily expanding, with a growing wave of homegrown providers challenging the dominance of global hyperscalers. In Nigeria, startups like, Nobus, Layer3, and Galaxy Backbone offer local hosting, local currency billing, and improved latency critical features amid forex volatility and rising demand for data sovereignty. Similar shifts are happening across the continent; Pawa IT and Safaricom Cloud in Kenya, GPX Egypt and Link Datacenter in Egypt, Paratus in Namibia and Dimension Data (NTT) in South Africa are providing regionally grounded solutions. Though they face scalability and automation challenges, these providers offer real value in local compliance, cost efficiency, and service proximity.

At the same time, global players such as AWS, Microsoft Azure, Google Cloud, Oracle, IBM, CISCO, Huawei Cloud, and Alibaba Cloud continue to expand their African footprint, with major hubs in South Africa, Kenya, Egypt, and Nigeria. Alongside these, other African cloud providers like Digicloud Africa, BCX, Routed, Atlas Cloud Services, N+PlusOne, CSquared, ST Digital, INFRATEL (Zambia), and inq (Mauritius) are strengthening Africa's infrastructure backbone. Their presence highlights a critical trend, Africa's cloud economy is becoming more distributed, more locally anchored, and more strategically competitive.

Despite these innovations, challenges remain. Cybersecurity risks remain a major drag on cloud adoption. According to the Kaspersky Security Network, African countries were prominently ranked in the global top 100 for online threats in 2023, with Kenya ranked at 35th, Nigeria at 50th, and South Africa 82nd, with significant increases in spyware and ransomware targeting African businesses. According to a May 2025 Kaspersky report, Africa's share of users affected by ransomware stands at 0.41%. The report notes that while ransomware has been less prevalent on the continent historically, attacks are now on the rise in countries like Nigeria and South Africa as their economies digitise. This is reinforced by Deloitte's 2025 Cybersecurity Outlook, which highlights Nigeria's rapid digital growth outpacing its cybersecurity readiness, a gap notably broader for local cloud providers with limited investment capacity. To strengthen cloud resilience, significant investments in cybersecurity infrastructure, skilled personnel, and standardised protocols is critical.

> *"At Heirs Technologies, innovation is our DNA, and we follow a multi-dimensional approach to deliver Digital, Cloud, Data, and AI-powered services to our clients. We have invested in digital platforms that enable our customers to become successful in the marketplace. This includes intelligent automation, scalable cloud solutions, and insights-driven data platforms tailored for the African business landscape."*
>
> **— Romanus Eke, Ag. CTO, Heirs Technologies**

2.2.1 The State of Cloud Adoption: A Cautious but Inevitable Shift

Cloud adoption in Africa is advancing, but its pace is deliberately slow, especially within highly regulated sectors like finance.

> *"At the present time, the African continent has only 1% of the global data centre footprint; 0.5% of Cloud according to Xalam Analytics. We can*

either bemoan the fact we are so far behind, or we can celebrate and act on the immense potential for growth in this continent, which is now starting to be realised."

— Dr Ayotunde Coker, CEO, OADC

Regulation and data sovereignty are primary barriers to adoption. The most significant hurdle is the complex web of regulatory frameworks, particularly concerning data sovereignty. Financial institutions, being the most regulated, are hesitant to move core applications to the public cloud.

Despite regulatory constraints, enterprises are not entirely avoiding the cloud. Instead, they are pursuing a hybrid strategy, "moving applications that are not core applications into the cloud gradually." A pragmatic approach to leveraging cloud benefits while adhering to compliance mandates. Additionally, connectivity constitutes a fundamental challenge. A critical and often underestimated barrier in Africa is the cost and reliability of internet connectivity. The user experience and the financial viability of cloud migration hinge on this factor.

Cloud growth in Nigeria will be determined by an increase in Mobile Broadband and Fixed Wireless Access (FWA) penetration, for both SMEs and consumers. Still, over 55% of users in Sub-Saharan Africa are on 2G/3G, which limits cloud adoption and, more importantly, excludes many from participating in the digital economy, says Lars Johannisson, CEO, Rack Centre.

The African cloud market is dominated by global hyperscalers, creating an existential challenge for local providers. This leadership is firmly held by the 'big four' global cloud providers AWS, Microsoft Azure, Google Cloud, and Oracle which are the recognised leaders in the space. Their extensive service portfolios (SaaS/PaaS), vast infrastructure and brand familiarity gives them a significant competitive advantage.

2.3. Regulation, Data Sovereignty & Policy Trends

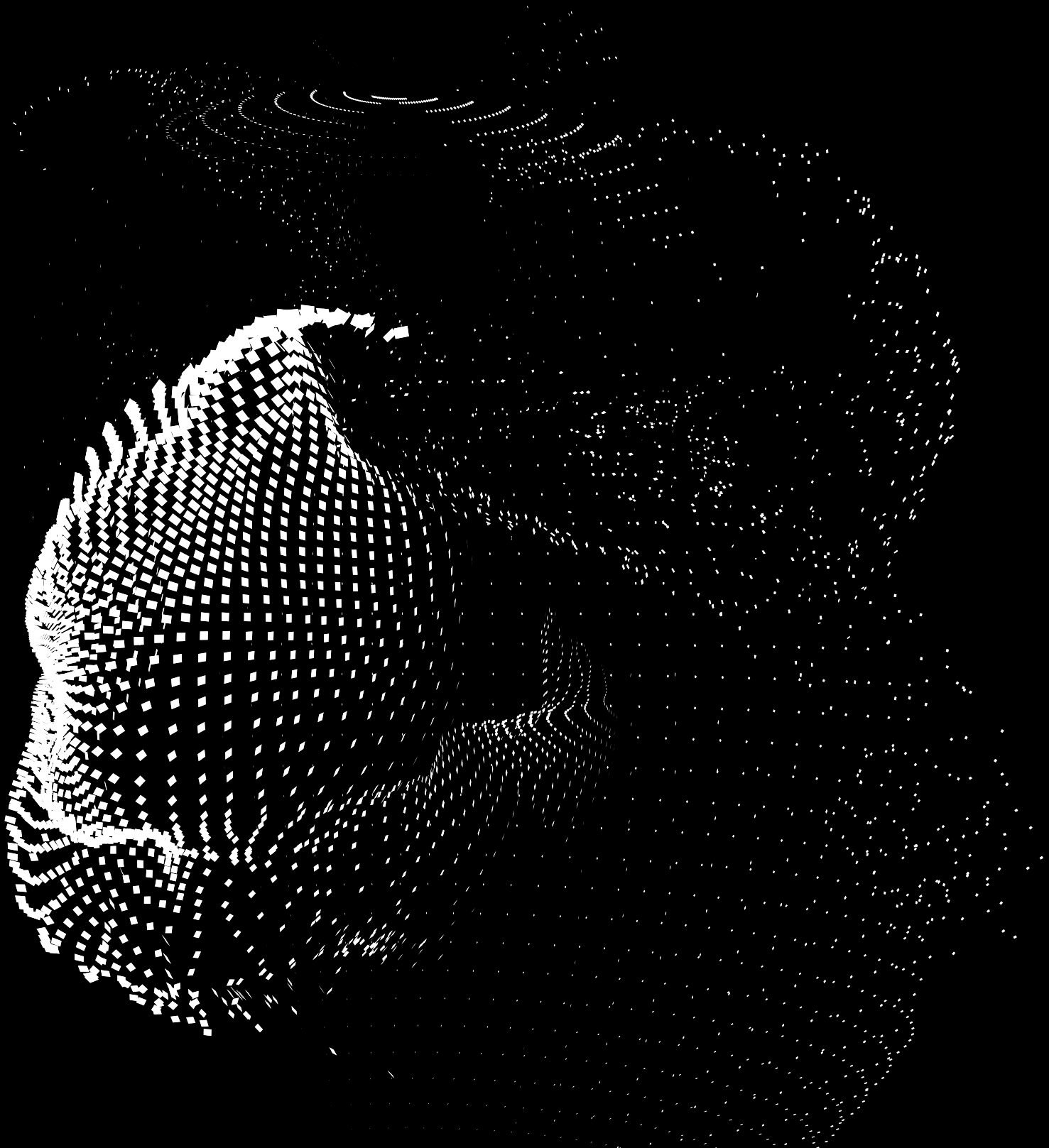
Africa's regulatory landscape for data protection continues to evolve, with 39 out of 55 countries enacting laws and 34 establishing data protection authorities. Nations like Ethiopia, Malawi, and Botswana have strengthened their frameworks, while others lag behind, creating inconsistencies for businesses operating across multiple jurisdictions. Regulatory enforcement has also intensified, as seen in Nigeria and Kenya, where authorities are issuing fines and conducting audits. The National Policy on Data and Cloud (2024) in South Africa outlines strategies for digital infrastructure, cloud adoption, and data sovereignty. Governments are prioritising cloud services for ICT procurement, emphasising interoperability, scalability, and cost optimisation. This shift reflects a growing emphasis on compliance, privacy, and the need for unified standards across the continent.

Looking ahead, Africa's data protection landscape is poised for further refinement. Discussions around the Cross Border Privacy Rules (CBPR) framework may shape future international data flows, making global compliance more feasible. Additionally, the protection of children online is gaining traction, with countries like Senegal and Botswana introducing regulations to curb cyber threats to address enforcement challenges and refine strategies for ensuring long-term digital security across the continent.

"In balancing innovation with individual rights, a strong data protection framework is essential. It must support digital transformation while safeguarding privacy and building trust."

— Dr. 'Bosun Tijani, Federal Minister of Communications and Digital Economy of Nigeria

03.
AI Readiness and Use cases

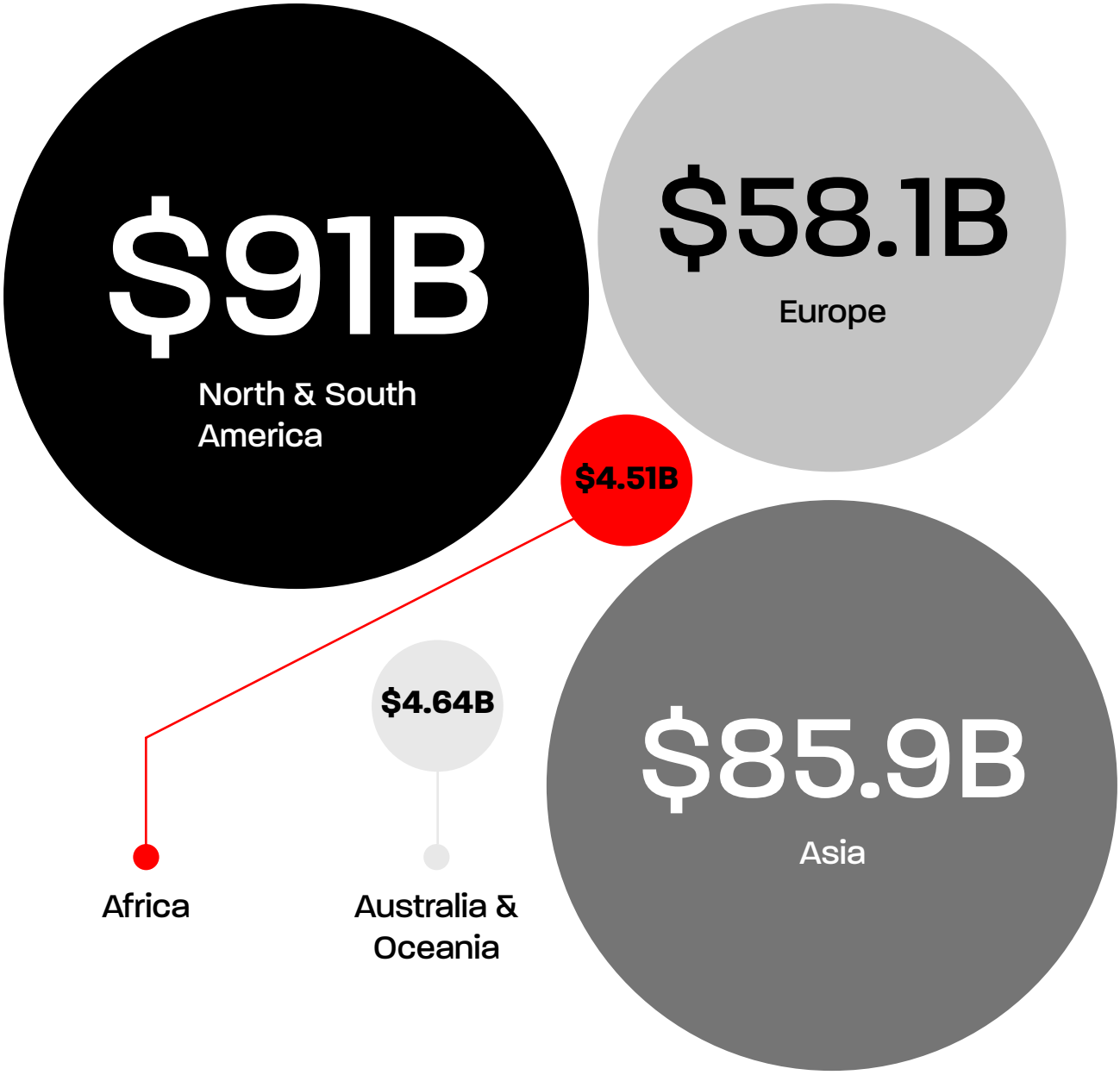


03.
AI Readiness and Use cases

Africa stands at a critical inflection point in its AI journey. While global AI investment is forecast to more than double to $632 billion by 2028 (IDC, 2024), Africa accounts for a fraction of this capital flow. More specifically, the global AI market is projected to reach $244.22bn in 2025, with Africa projected for $4.51bn, representing approximately 1.85% of the total market size. Nevertheless, the continent is demonstrating pockets of high ambition, active policy experimentation, and rising AI ecosystems, especially in nations like South Africa, Kenya, Nigeria, Egypt, and Morocco.

2025 Projected market size of Artificial Intelligence

Source: Statista



3.1. AI Readiness across Africa

According to BCG's AI Maturity Matrix (2024), which assesses 73 global economies across six archetypes of AI development, most African nations currently fall within the "AI Emergents" or "Gradual Practitioners" categories, reflecting foundational awareness coupled with limited deployment capabilities.

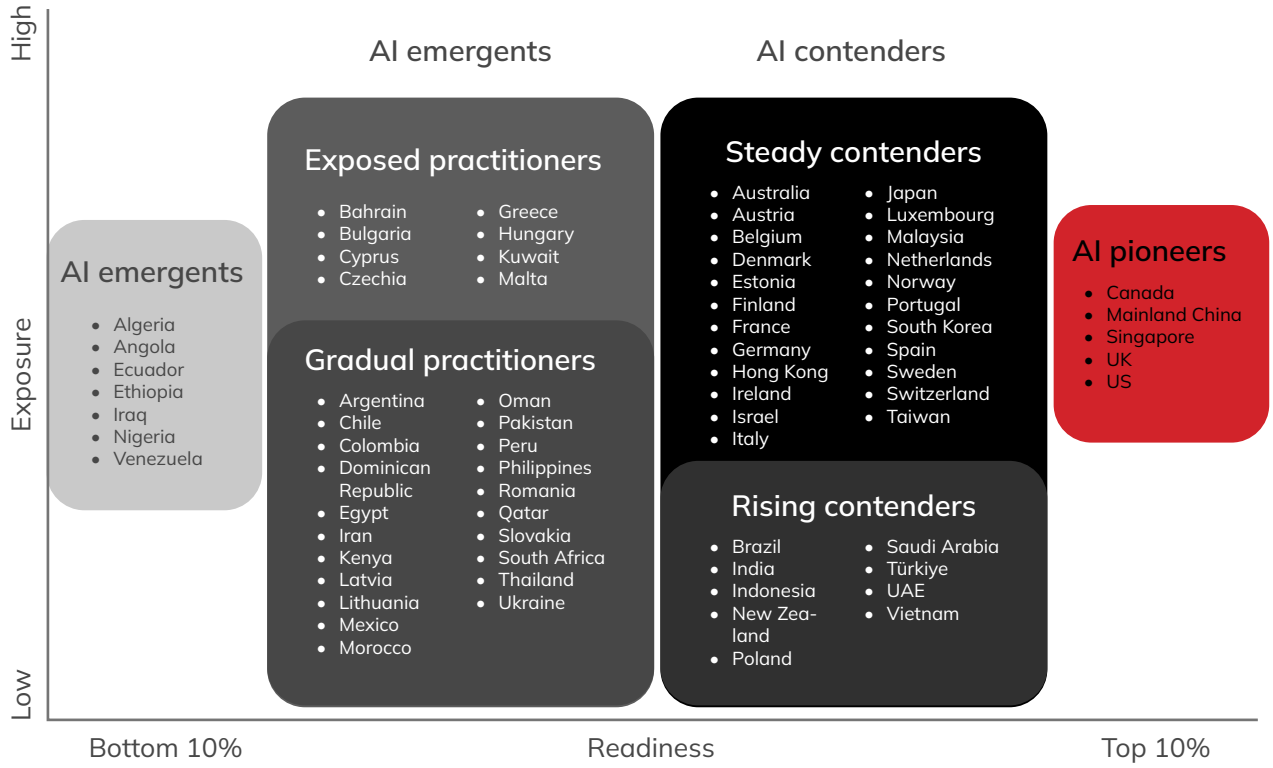
The skills dimension presents concentrated pockets of expertise in Kenya, Egypt, and Nigeria, revealing participation gaps though technical capability yardsticks like GitHub engagement and Kaggle participation across the region, indicating limited practical AI/ML experience within the talent pool.

> *"AI has come as an enabler to provide a platform that does not exist and actually enable the continent to address a lot of infrastructural shortages ... Essentially there is a logical relationship in social development and application of AI to the extent that it can provide a platform to leapfrog and address some of the shortages that we have seen over the years in the continent."*
>
> **— Dr. Olubayo Adekanmbi, CEO, Data Science Nigeria**

While policy ambition across the continent is exceptional, with over 20 African nations having published or developing national AI strategies (notably South Africa's AI Institute, Egypt's national framework and Nigeria's National AI Strategy), a critical execution gap persists between strategic articulation and operational implementation.

This execution gap is fundamentally rooted in inadequate infrastructure foundations that AI systems require to function effectively. On average, a ChatGPT query needs nearly 10 times as much electricity to process as a Google search illustrating AI's extraordinary power demands. Contemporary AI deployment requires robust data center infrastructure with consistent power delivery of gigawatt-scale capacity — one billion watts. Against this backdrop, Africa faces stark realities, having the lowest consumption at less than 1 kWh of data centre electricity consumption per capita in 2024 while out of the 1.6 billion people who are not connected, Africa really is one of the biggest contributors to global digital exclusion. All of these shows one clear truth, with Africa's obvious infrastructure gaps, AI is likely to struggle on the continent as the technology demands massive computational resources, scalable storage, real-time responsiveness, and unwavering power supply. While AI has the potential to add up to $15.7 trillion to the global economy by 2030, with Africa contributing an estimated $1.2 trillion, realising this potential requires bridging the infrastructure deficit between African economies' current capabilities and AI's minimum operational thresholds. This infrastructure challenge directly shapes how African economies are positioned along the AI adoption spectrum, with most nations clustering in early-stage categories despite their strategic aspirations.

Distribution of Economies Across the Archetypes of AI Adoption



Which economies are ready for AI?

Source: BCG

The investment climate remains structurally undercapitalised, with thin private sector funding flows and an absence of AI unicorns. Though early traction is emerging in fintech applications across Nigeria and Kenya, and agritech solutions attracting venture backing. Infrastructure presents mixed readiness across the six most AI-exposed sectors (information and communication, high-tech goods, retail, financial services, public services, and motor vehicles manufacturing), with fixed broadband speeds among the lowest globally creating fundamental deployment constraints. However, mobile connectivity penetration offers alternative pathways, with cloud-based AI platforms enabling infrastructure leapfrogging in markets like Rwanda and Ghana, despite persistent power reliability challenges. The strategic imperative for African economies involves balancing realistic capability building with ambitious positioning through focused sector specialisation, international partnership development, and coordinated regional approaches rather than attempting to compete across all AI application domains simultaneously.

AI Readiness across Africa.

Source: TechCabal Insights

	Tier 1	Tier 2	Tier 3
Skills	Strong talent density: 230+ AI startups; >7,000 tech startups across Nigeria, SA, Kenya, Egypt.	Growing talent base: ~160 AI startups; Morocco, Tunisia, Ghana, Rwanda with active ecosystems.	Fragmented skills landscape; <50 AI startups per country; limited AI-trained workforce.
Data Infrastructure	High concentration of data centers (SA: 49, Nigeria: 16, Kenya: 18, Egypt: 14).	Mid-range coverage (Morocco: 8, Ghana: 7, Senegal: 7, Mauritius: 10); active growth in infrastructure.	Sparse distribution; most have <10 data centers; heavy reliance on colocation or regional providers.
Policy Frameworks	Comprehensive data protection laws and functioning DPAs; strong regulatory momentum.	Most have enacted laws; governments investing in digital and AI strategies (e.g., Smart Rwanda).	Mixed adoption; many countries still drafting or lack enforcement capacity for data governance.
Funding	$1.08B+ in AI-specific investment; $12B+ in general VC tech funding.	~$157M in AI investment; $1.5B+ total startup capital.	AI funding typically <$10M per country; ecosystem capital remains very limited.

TIER 1 – HIGH STARTUP ACTIVITY:
Nigeria, Kenya, South Africa, Egypt

TIER 2 – MODERATE STARTUP ACTIVITY:
Morocco, Ghana, Tunisia, Rwanda, Senegal, Uganda, Tanzania, Algeria, Zambia, Côte d'Ivoire, DR Congo

TIER 3 – LOW STARTUP ACTIVITY:
The rest of African countries

3.2. AI Use Cases by Sector

While Africa's AI readiness exhibits heterogeneous patterns across markets, sector-specific use cases are emerging organically in domains aligned with local market imperatives and infrastructural realities. These applications are increasingly catalysed by Small Language Models (SLMs) and lightweight machine learning architectures specifically designed for resource-constrained environments, enabling pragmatic AI deployment despite foundational infrastructure limitations.

Strategic Sector Applications and Market Traction:

Agriculture represents Africa's most mature AI deployment sector, with applications spanning crop disease detection, yield prediction analytics, and supply chain optimisation. PlantVillage's Nuru platform exemplifies this trend, utilising AI-powered crop disease detection for cassava, potato, and African maize, all functioning in real-time without internet access. The platform has achieved significant impact across East Africa, serving farmers growing cassava, a crop that provides food for over half a billion people daily across the continent. PlantVillage's approach demonstrates strategic AI localisation: their system combines human expert-level crop disease diagnostics using computer vision, anomaly detection capabilities exceeding human performance, and automated responses in local languages.

Healthcare applications focus on diagnostic AI solutions with immediate public health impact, particularly TB screening algorithms, epidemiological mapping, and telemedicine triage systems. South Africa's AI healthcare market demonstrates a significant growth trajectory, valued at $0.04 billion in 2022 and projected to reach $0.95 billion by 2030 with a 46.45% CAGR, while local companies like Unify Health are developing integrated healthcare technology solutions designed specifically for African hospital environments. More importantly, research has shown that AI systems developed using African-generated data yield superior outcomes for African healthcare contexts, particularly in administrative and clinical services.

Financial Services demonstrates Africa's most globally competitive AI applications, with credit scoring algorithms for underbanked populations, sophisticated fraud detection systems, and robo-advisory platforms in microfinance. Nigeria's fintech ecosystem has achieved notable scale, with companies like Paystack and Flutterwave processing billions in transaction volumes annually. In 2019, using advanced technology both payment companies - Paystack and Flutterwave, helped disrupt illicit transactions by Nigerian fraudsters worth over $118 million, demonstrating the sophistication of both fraudulent activities and the AI-powered detection systems developed to combat them. In July 2025, United Bank for Africa (UBA), launched the first AI - powered chatbot in Africa to offer cross-border payments, providing customers with a seamless and instant way to transfer funds across the continent.

> *"The introduction of cross-border payments on LEO, in partnership with PAPSS, reflects our commitment to digital innovation, Pan-African integration, and customer-centric banking. This is not just a banking upgrade; it is a bold leap into the future of African finance."*
>
> **Group MD/CEO, Oliver Alawuba, United Bank for Africa (UBA)**

Education applications center on AI tutoring systems in vernacular languages, personalised learning pathways, and curriculum analysis tools. Kenya's public education system has piloted AI-powered learning platforms that adapt to individual student progress, resulting in 28% improvement in standardised test scores across pilot schools.

Public Services implementations include citizen grievance redressal chatbots, resource allocation analytics for water and energy distribution, and predictive maintenance systems for infrastructure. Rwanda's e-governance platform demonstrates leadership in this domain, with AI-powered citizen service bots handling 73% of routine inquiries without human intervention.

3.3. Governance, Ethics and Responsible AI in Africa

While establishing comprehensive governance frameworks for AI represents sound policy foresight, there exists a legitimate debate about whether Africa's current approach risks placing regulatory structures ahead of technological infrastructure development. Europe's experience with the AI Act offers a cautionary tale where compliance costs and unnecessary red tape could stifle AI innovation, with industry bodies warning that "the EU's AI Act needs to be closely monitored to avoid overburdening innovative AI developers... with unnecessary red tape". Given Africa's nascent AI ecosystem and significant infrastructure deficits, premature regulatory complexity could inadvertently hamper the continent's ability to establish a competitive AI foundation. However, the African Union's approach demonstrates strategic wisdom by positioning governance development as commensurate with technological growth rather than as a prerequisite, ensuring that ethical frameworks mature alongside AI adoption.

The AU Continental Strategy articulates this balanced approach through its multi-tiered governance framework that emphasises building upon existing legal foundations while addressing regulatory gaps as they emerge. The strategy recognises that effective AI governance requires "amendment and application of existing laws and frameworks" including intellectual property, data protection, and cybersecurity legislation, rather than creating entirely new regulatory architectures. This pragmatic approach allows for "agile, forward-looking and risk-based regulations" that can evolve with Africa's AI maturity, while establishing crucial foundations such as regulatory sandboxes for innovation and independent oversight bodies. The emphasis on "African-led research" to assess risks and evaluate governance efficacy ensures that regulatory frameworks remain contextually relevant and proportionate to Africa's developmental stage, avoiding the regulatory overreach that has concerned observers of Europe's more prescriptive approach.

3.4. Competitive Landscape & Key Players

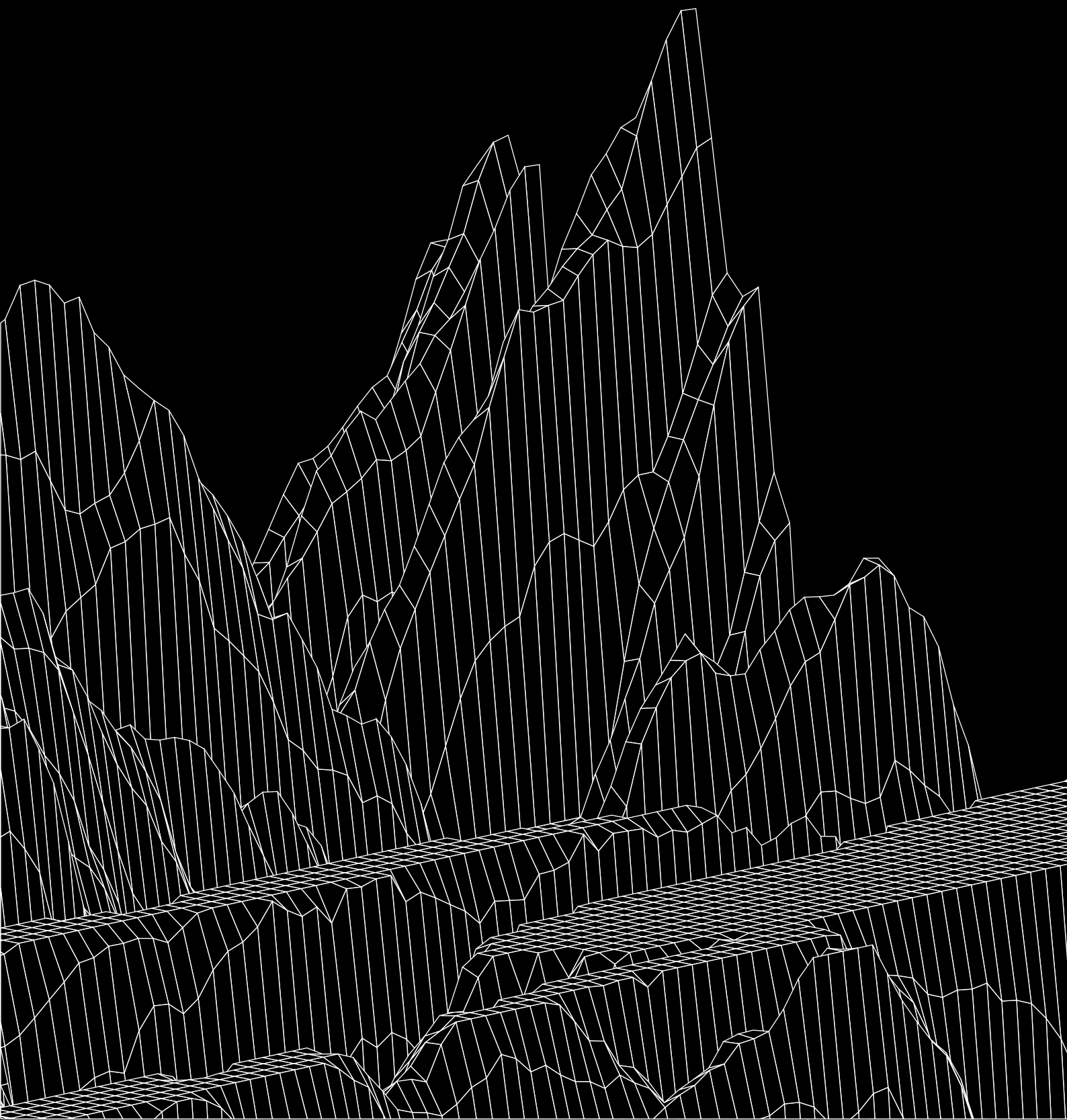
African companies and startups are strategically leveraging AI technologies to create distinctive competitive advantages across critical sectors, demonstrating innovation despite infrastructure constraints. The continent's most significant AI success story emerged from Tunisia, where InstaDeep was acquired by German biotech company BioNTech for over $550 million, showcasing Africa's capability to build world-class AI solutions. InstaDeep's success stems

from two key advantages: "the community" and "the opportunity to innovate," with the African machine-learning community being particularly vibrant, exemplified by initiatives like the Deep Learning Indaba that brings together African AI researchers annually. Healthcare represents a particularly active domain where African AI startups are being deployed to monitor maternal health, produce diagnostic imaging, and develop AI-powered virtual clinic appointments, with companies like Ubenwa Health, founded in 2017, fusing skills in engineering, artificial intelligence, and medical research to detect the meaning of cries from infants.

The competitive landscape reveals African startups gaining international recognition through strategic positioning in niche markets. Google's eighth accelerator cohort selected ten African startups, with at least 3 of them centering their solutions on AI implementation, including CDIAL AI from Nigeria developing AI-powered language solutions for African languages, and NextCouncel supercharging lawyer productivity with an AI-powered tool for contract management, solicitor engagement, compliance, and more, highlighting how companies are addressing continent-specific challenges through localised AI applications. The success of these ventures demonstrates that African AI companies are not merely adopting global solutions but are innovating to create proprietary technologies that serve as springboards for international expansion, with the InstaDeep acquisition serving as proof of concept that African-born AI companies can achieve global relevance and substantial valuations.

04.

Digital Infrastructure Investments



04. Digital Infrastructure Investments

Digital infrastructure investments are crucial for Africa's economic growth, fostering innovation, financial inclusion, and education. As of February, 2025, Africa's internet penetration has reached approximately 646 million users, a significant increase from 181 million in 2014. Expanding broadband access enhances productivity and bridges the digital divide, Improving connectivity supports startups, e-commerce, and AI adoption, driving sustainable development. Strategic investments ensure secure, resilient infrastructure for long-term progress.

"New investments in digital infrastructure will enable the continent to "leapfrog" its current hurdles and make seismic advances in everything from education to healthcare to agriculture, logistics, mining, and other industries ... We deeply believe that everybody deserves the benefits of a modern connected life."

— Ralph Mupita, President & CEO, MTN Group

4.1. Data Centers & Cloud Infrastructure investments in Africa

Africa's digital economy is being underpinned by a quiet revolution in data center expansion. As of 2025, the continent is home to 211 active data centers, forming the physical backbone of Africa's cloud acceleration. While the ecosystem remains unevenly distributed, four countries South Africa (49), Kenya (18), Egypt (14), and Nigeria (16) account for the largest share, cementing their positions as regional infrastructure hubs.

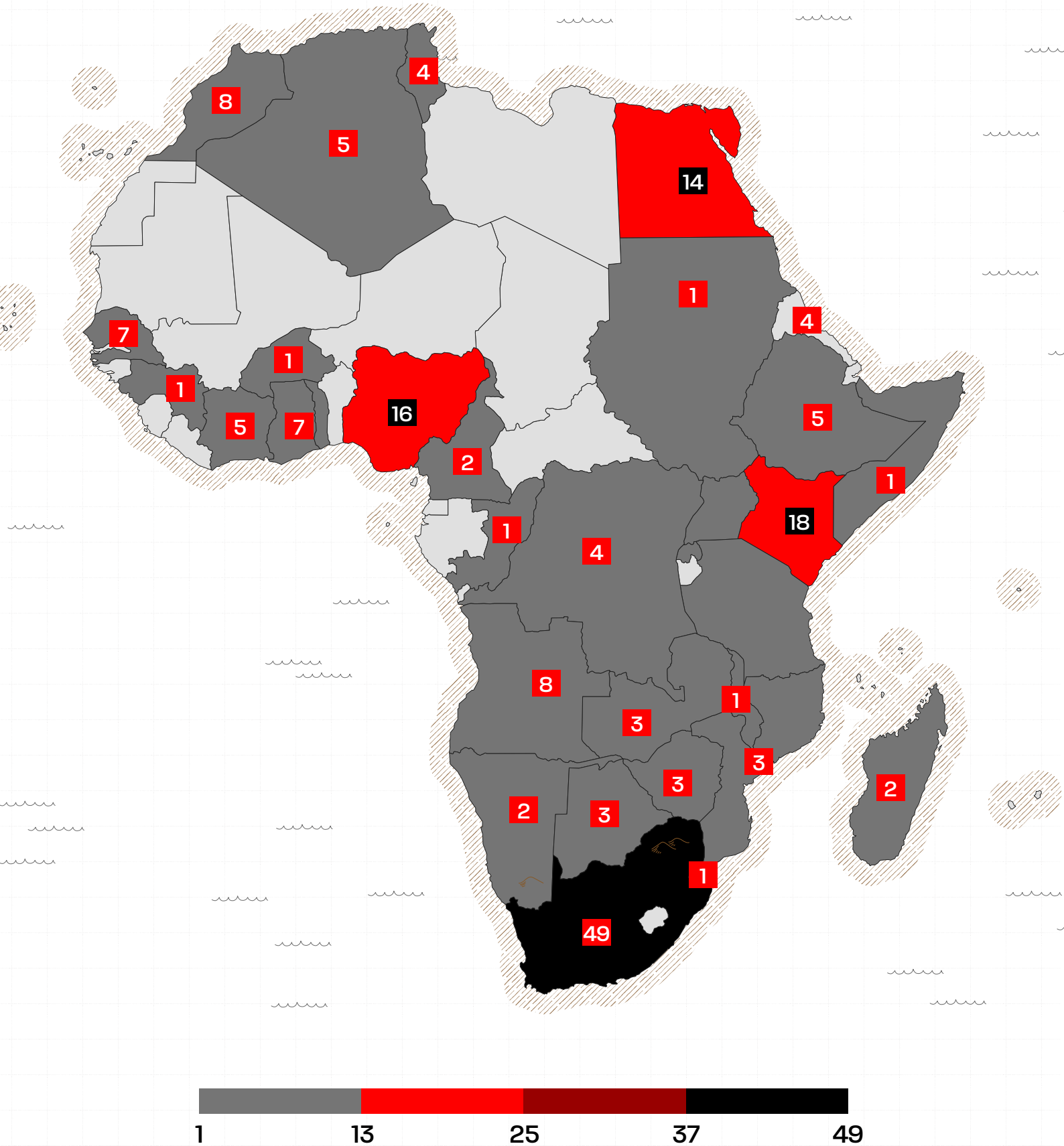
The growing demand for hyperscale computing, regional colocation, and AI-ready capacity has led to renewed investor interest across Nigeria, Kenya, and South Africa.

In West Africa, Nigeria leads the way with major facilities concentrated in Lagos and Abuja, including Tier III-certified centers operated by Rack Centre, Equinix (MainOne), Digital Realty, NTT Global, MTN, Galaxy Backbone Plc, OADC, and ipNX Nigeria Ltd. Ghana and Senegal are also gaining traction, hosting 7 and 5 data centers respectively, serving as cloud on-ramps for the wider ECOWAS region.

East Africa's infrastructure footprint is anchored in Kenya, with data centers clustered in Nairobi and Mombasa. Operators such as Digital Realty, iXAfrica, Telkom, PAIX, and Safaricom serve public and private sectors across the region. Rwanda is also stepping forward with government-led cloud-native platforms powered by local infrastructure.

Mapping Data Centers across African Countries

Source: Data Center Map



North Africa is showing strong momentum, particularly in Egypt and Morocco. Egypt hosts 14 data centers across Cairo, 6 October City, Mansura, and Suez, operated by key players such as Telecom Egypt, Etisalat Misr, Orange, and Raya Data Center. Morocco supports 8 centers, primarily in Casablanca, led by telcos and regional cloud integrators.

Southern Africa remains the most mature and commercially attractive market. South Africa alone houses 49 data centers in Johannesburg, Cape Town, Pretoria, Durban, and Stellenbosch, with hyperscale capacity operated by AWS, Microsoft Azure, Teraco, Vodacom Business, Equinix and NTT Global. These facilities support enterprise workloads across the continent and act as interconnection points for subsea and regional fiber systems.

It is important to note that many of Africa's leading data center players are also evolving into full-fledged cloud infrastructure providers. Players like Equinix, Digital Realty, and Liquid Intelligent Technologies are not only hosting physical infrastructure, they are actively enabling cloud migration, offering IaaS and edge services, and building interconnection platforms that bridge hyperscalers with local enterprise and government clients. This convergence of colocation and cloud capability marks a critical inflection point in Africa's digital maturity, reducing latency, addressing data sovereignty concerns, and creating local value chains in cloud services. Data sovereignty is becoming non-negotiable. As Africa digitises, countries want their data processed locally, by infrastructure they trust and control, says Wole Abu, CEO, Equinix West Africa.

The cloud infrastructure layer itself is also deepening across the continent. As of 2025, major African cities are now hosting direct cloud infrastructure from global and regional providers. South Africa leads with 12 providers active across Cape Town and Johannesburg, including Google Cloud Platform, Microsoft Azure, Amazon AWS, Huawei Cloud, Vultr, gcore cloud, and Oracle Cloud Infrastructure. Kenya, centered in Nairobi, is home to infrastructure from AWS, Microsoft Azure, and Oracle. Nigeria is anchored by AWS's and Huawei cloud Lagos region, while Egypt supports platforms like Huawei Cloud, NutroCloud, and 99CloudTech across Cairo. In Morocco, Oracle Cloud Infrastructure is live in Casablanca, and Mauritius offers regional services from MCS Cloud and Virtual Servers in Port Louis and Reduit. These key locations are becoming strategic digital gateways, enabling cloud-native innovation, compliance with local data regulations, and high-performance enterprise workloads within African borders.

Cloud Infrastructure in key Africa cities

Source: Data Center Map

Country	Numbers	City Hosting	Providers
Egypt	5	Cairo	NutroCloud, 99cloudTech Local, Huawei Cloud
Kenya	3	Nairobi	Amazon AWS, Microsoft Azure, Oracle Cloud Infrastructure
Nigeria	2	Lagos	Amazon AWS, Huawei Cloud
Mauritius	2	Port Louis, Reduit	Virtual Servers, MCS Cloud services
South Africa	12	Cape Town, Johannesburg	Zappie Host, Google Cloud Platform, VPSNINE, go2cloud, Amazon AWS, GCore cloud edge, kronos cloud, RSAWEB, Microsoft Azure, Huawei Cloud, Vultr, Oracle Cloud Infrastructure
Morocco	1	Casablanca	Oracle Cloud Infrastructure

Africa's hybrid cloud future depends on this growing fusion of physical infrastructure and intelligent compute, with data centers serving as both the entry point and the engine of digital transformation across the continent. Operators are also exploring energy innovations. The high cost of diesel, regulatory pressure, and carbon disclosure standards are pushing players toward solar-hybrid models.

> *"In 2023, we transitioned all our power generation from diesel to 100% gas-powered systems. Our new 12MW facility will also incorporate solar (PV) as part of its energy mix. We've applied design thinking throughout to ensure energy efficiency. This is how we're enabling sustainable digitalisation in Nigeria. It's not just a preferred approach — it's the only path forward that society, clients, and stakeholders will accept."*
>
> — **Lars Johannisson, Rack Centre**

4.2. Connectivity & Broadband Expansion in Africa

Africa's leap into cloud and digital infrastructure depends heavily on underlying connectivity improvements, and recent progress is encouraging. As of 2024, 84% of the Sub-Saharan African population was covered by 4G networks, up from just over half in 2015. However, only approximately 37% of Africans were online in 2023, highlighting that access alone has not yet translated into widespread usage. While submarine cables such as Google's Equiano, Meta's 2Africa, and MainOne's regional network are delivering large-scale capacity, persistent barriers remain including inadequate last-mile connectivity, limited rural broadband, high service costs, and unreliable power in off-grid areas . Closing these gaps will require targeted investments that pair network infrastructure with energy solutions and digital skills, particularly in rural and underserved markets.

"Although Africa is rapidly acquiring sufficient bandwidth for its needs... the only real hindrance left is the local fibre roll out and local access. Once addressed, this will dramatically change the lives of even greater numbers of Africans by making bandwidth more affordable in more places."

— Chris Wood, CEO, West Indian Ocean Cable Company (WIOCC)

4.3. Digital Public Infrastructure investments in africa

Across the continent, governments are building scalable, interoperable Digital Public Infrastructure (DPI) systems with strong focus on identity, payments, and data exchange to unify digital access and support services at scale. While nations like Nigeria (National Identity Number (NIN) and Bank Verification Number (BVN)), Kenya (Huduma Namba), Rwanda (Irembo), and Ghana (Ghana Card) are examples of pioneering integrated DPI, they represent a broader continental push where numerous other countries are also focused on building scalable digital foundations. These initiatives operate as modular foundations for public services, enabling cross-border digital trade under frameworks like the AfCFTA. They complement Africa's thriving mobile money ecosystem, which now surpasses 300 million accounts in Sub-Saharan Africa, and are signaling a regional push toward borderless digital public services. But DPI uptake is uneven. Some countries still face connectivity rates under 20%, insecure data governance, and skills shortages in public institutions. Building DPI at scale will require co-investment in legal frameworks, interoperable technical architecture, capacity development, and energy infrastructure.

4.4. AI and Compute Infrastructure in Africa

AI's rapid expansion across finance, health, and agriculture hinges on robust compute infrastructure yet Africa remains in the early innings. While a few High-Performance Computing and AI pilot environments exist (notably in South Africa, Nigeria and Kenya), they remain limited in scope. Providers such as Equinix, Teraco, and Africa Data Centres are beginning to offer GPU-optimised and edge compute services, but significant scale is yet to follow. Regional research hubs AIMS, Data Science Nigeria, and AI4D Africa are advocating for shared AI compute resources, but lack of energy reliability, cooling capacity, and affordable infrastructure remains a persistent bottleneck. Meeting Africa's AI ecosystem needs will require substantial investment in AI/data clusters, edge compute nodes, and green power integration, alongside cloud partnerships to ensure accessible computing at scale.

05.

AI Investment Tracker & Startup Funding

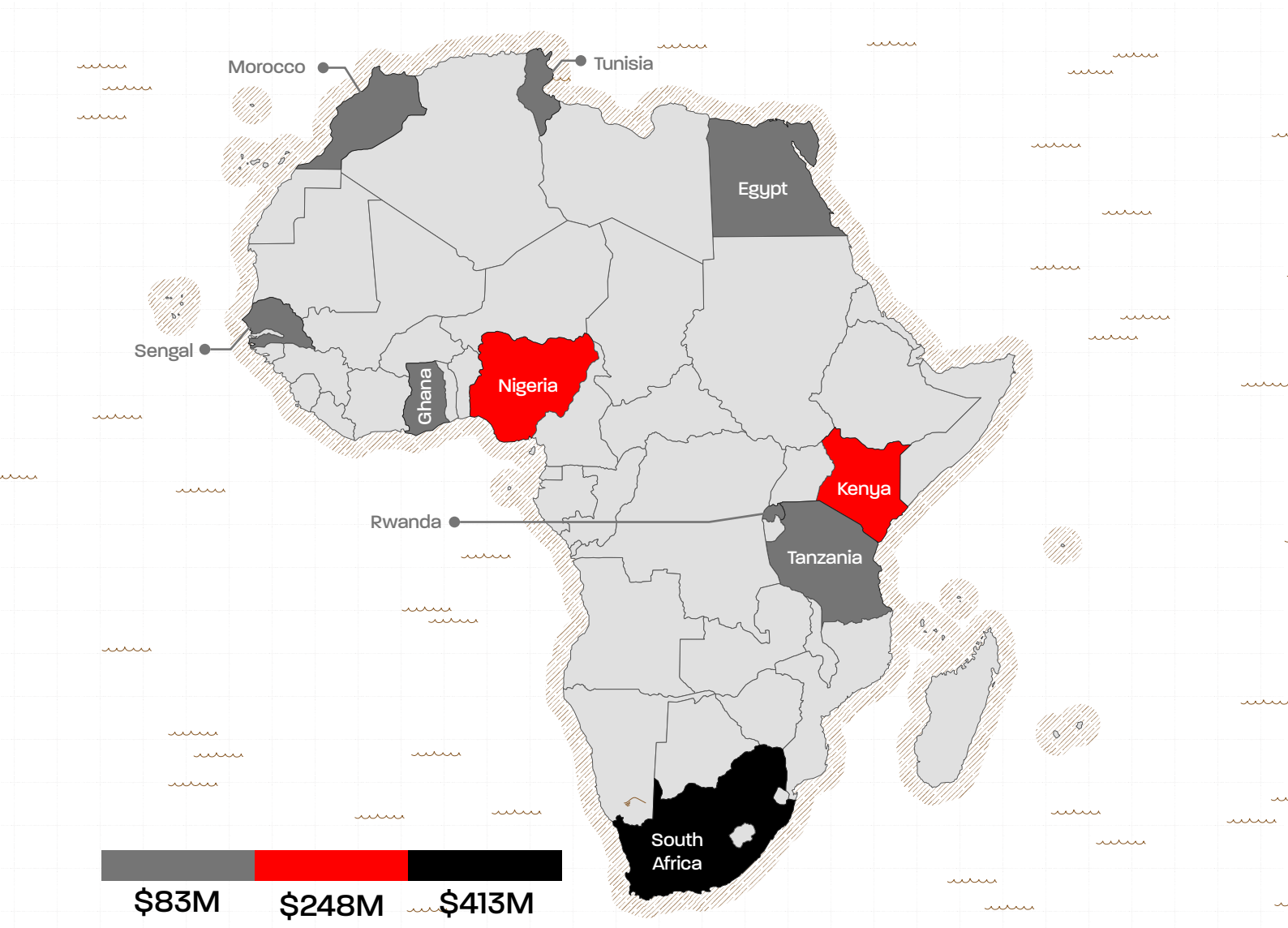


05.
AI Investment Tracker & Startup Funding

In the 5 years between Q1 2019 - Q1 2025, African AI startups raised a total of $1.25 billion across multiple sectors including healthtech, logistics, fintech, agritech, and energy. This figure reflects growing investor confidence in the continent's capacity to develop AI solutions tailored to local and global needs. The funding also illustrates the increasing diversity of use cases and signals Africa's growing presence in the global AI innovation economy.

AI Investment in Africa

Source: OECD.AI



Data from OECD.AI reveals that the continent's "Big Four"—South Africa, Nigeria, Kenya, and Egypt—take the lion's share of this capital, collectively attracting $1.08 billion. South Africa leads with $495.52 million, driven by the applications of AI technology in energy optimisation, customer analytics, and infrastructure AI. Nigeria follows with $226.11 million, fueled by healthtech and fintech applications, reflecting its maturing startup scene. Kenya raised $197.12 million, driven by agri-intelligence, conversational AI, and public sector partnerships, while Egypt attracted $161.10 million through startups working in automation, natural language processing, and education AI. These markets benefit from a stronger cloud infrastructure base, larger tech talent pools, and more evolved investor networks. The rest of the continent's emerging markets like Ghana, Mauritius, Rwanda, Morocco, and Tunisia collectively raised over $170 million, showing early momentum. However, disparities in regulatory maturity, infrastructure, and investor coverage highlight the funding gap outside Tier 1 markets (Nigeria, Kenya, South Africa, and Egypt).

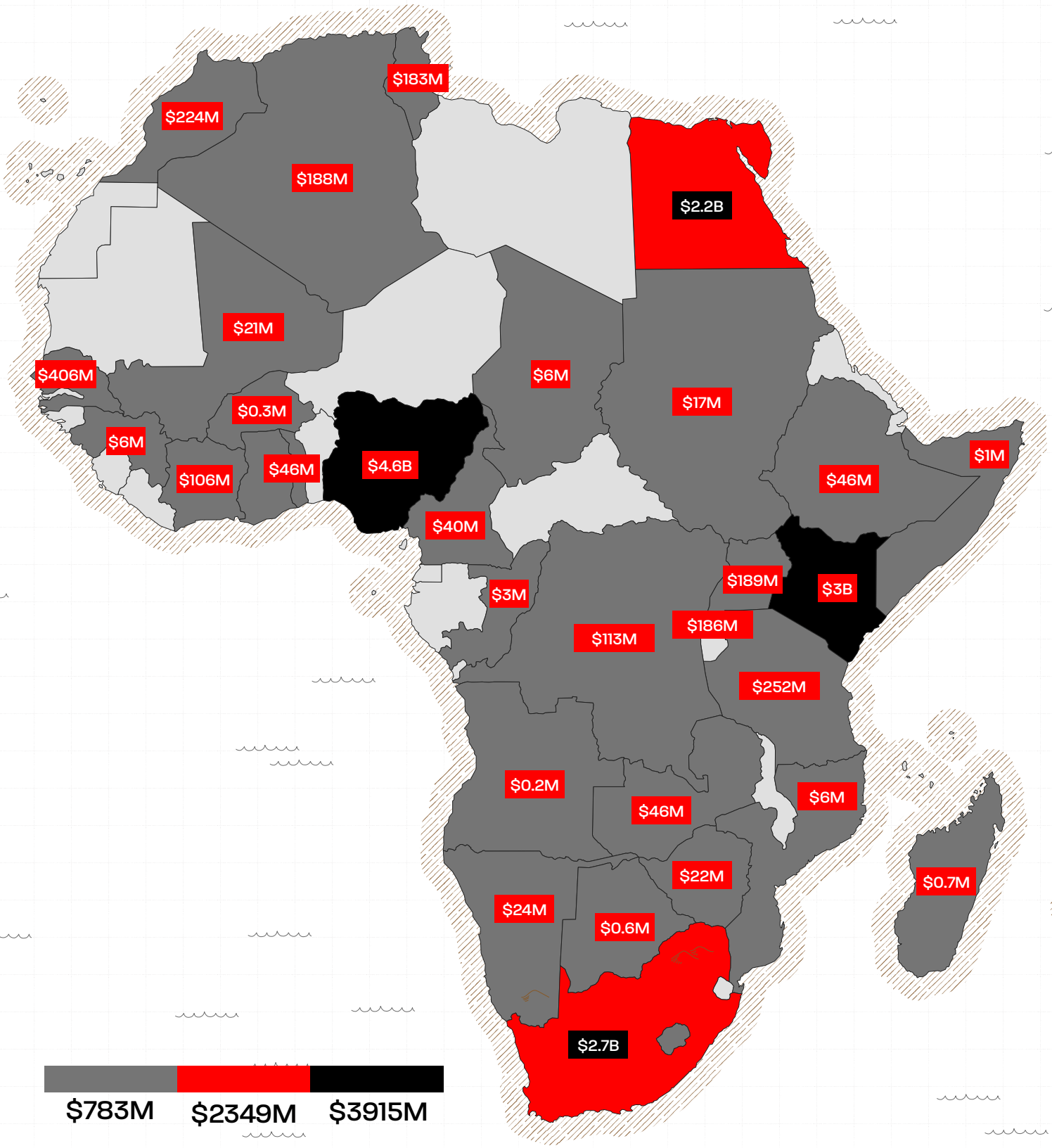
A growing number of startups are attracting attention for their AI innovation across Africa. These include InstaDeep, Xolani Health, NeedEnergy, Plentify, Thunder Code, DXwand, Copianto AI, and Sama, among others. Their work spans predictive diagnostics, smart energy systems, robotics, and small language models tailored to African contexts. This innovation wave is being supported by a diverse mix of international and African investors. Global names like Google (VC), Norrsken, and Techstars have participated in rounds, while African and Africa-focused funds like Launch Africa, Future Africa, LoftyInc, AfricInvest, and 54 Collective have played a key role in nurturing early-stage talent. As both deal flow and investor diversity increase, Africa's AI ecosystem is moving from the margins into the mainstream of global tech conversations.

5.1. Analysis of funding volumes and growth, VC/DFI mix, and investment flows, top hubs in Africa and gaps.

Venture Capital has reshaped Africa's startup landscape, flowing faster and deeper than ever before. From the start of 2019 to the first quarter of 2025, African startups raised a combined $16.7 billion in venture funding, led by Tier 1 markets like Nigeria ($4.7B), Kenya ($3.4B), South Africa ($2.7B), and Egypt ($2.6B). These four hubs continue to attract the lion's share of capital due to ecosystem maturity, policy clarity, and deepening investor networks. Beyond these markets, countries like Ghana, Senegal, Tanzania, Morocco, Uganda, Algeria, Rwanda, Tunisia, Democratic Republic of the Congo and Cote d'Ivoire are gaining traction, yet most other African nations remain significantly underfunded. The disparity highlights structural gaps in deal access, infrastructure, and early-stage capital in emerging ecosystems, especially in Central, Francophone, and smaller Southern African markets.

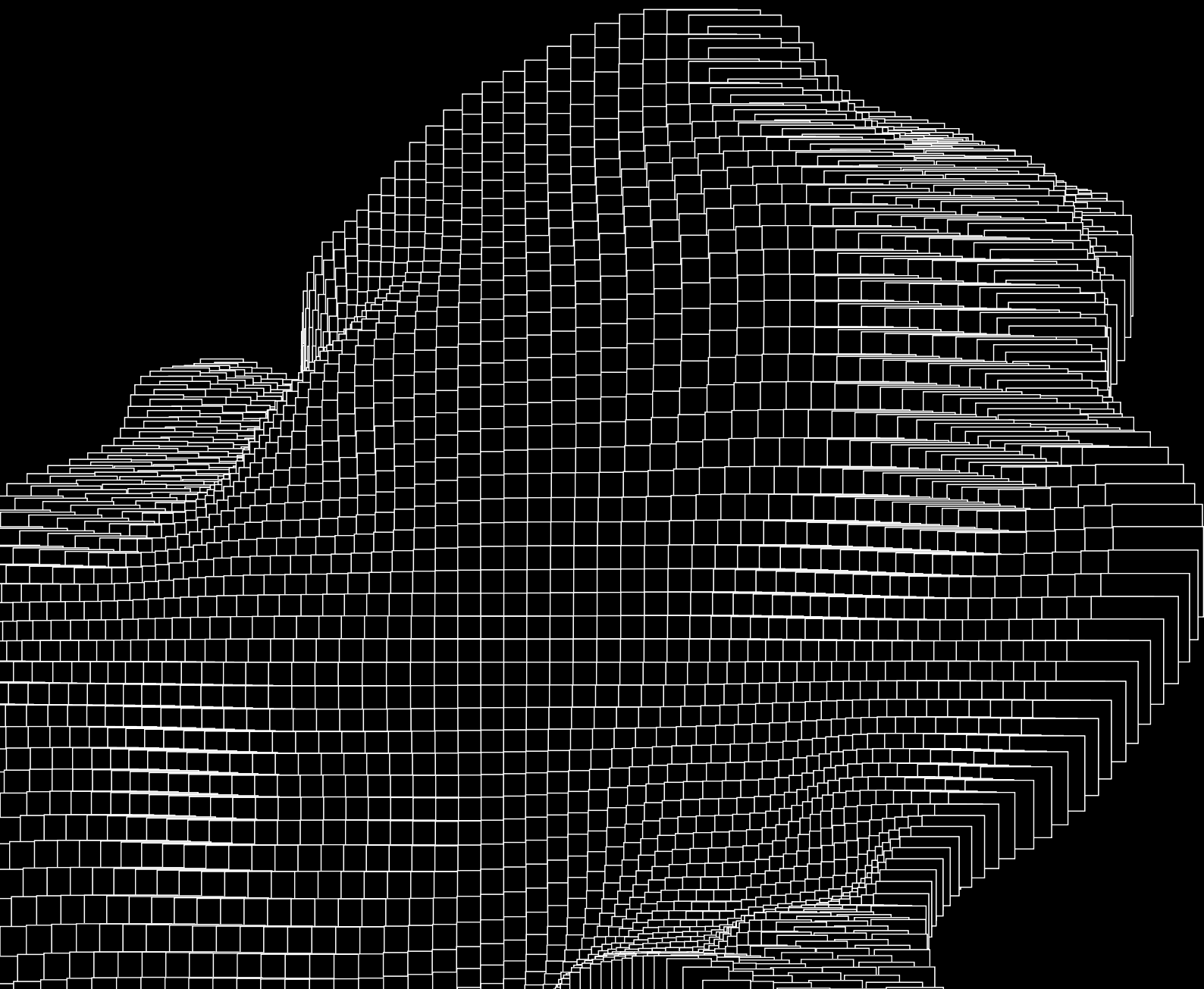
Funding in Africa Startups:

TechCabal Insights



06.

Strategic Outlook: Forecasts trends, Policy priorities, Investor signals



06.
Strategic Outlook: Forecasts trends, Policy priorities, Investor signals

Africa's digital future is approaching a pivotal inflection point. By 2030, the continent's digital economy is projected to exceed $700 billion in value, with cloud computing, artificial intelligence, and broadband infrastructure serving as foundational enablers. Yet realising this potential will require deliberate choices, particularly by public and private sector leaders charting the continent's digital future.

To sustain this growth trajectory, three structural forces must converge: scalable infrastructure, progressive regulation, and catalytic capital. Trends indicate rising investments in sovereign cloud infrastructure, AI-specific compute zones, and harmonised regional data frameworks. However, the path forward depends on more than market momentum. It demands execution with cloud computing, AI, and broadband infrastructure as its core enablers. To sustain this trajectory, three forces must converge: scalable infrastructure, progressive regulation, and catalytic capital. Trends indicate rising investments in sovereign cloud infrastructure, AI-specific compute zones, and harmonised regional data frameworks. However, the path forward depends on more than market momentum. It demands execution.

For CIOs, CTOs, this moment demands a shift from awareness to execution. Businesses must move beyond cloud migration pilots and embed AI-powered analytics, intelligent automation, and scalable cloud architectures into core operations, underpinned by sovereign-compliant, AI-ready infrastructure. To support this shift, investment in technical talent is critical, with reskilling in cloud engineering, AI operations, and digital architecture becoming a priority. National initiatives like Nigeria's 3MTT and private programs such as Heirs Technologies' i-Academy provide a solid foundation. Digital infrastructure budget strategies must also evolve, replacing legacy IT models with flexible, cloud-first frameworks that emphasise interoperability, energy efficiency, and data localisation. Finally, no single player can drive this transformation alone, ecosystem-wide collaboration will be essential to build shared infrastructure, enable cross-border data flows, and scale inclusive innovation.

Policy frameworks must also evolve. The African Union's (AU) Data Policy Framework, if adopted and operationalised at scale, could provide the regulatory architecture to support trusted data movement, digital rights protection, and responsible AI adoption.

Likewise, investor signals are shifting. While early-stage capital remains concentrated in Tier 1 ecosystems, development finance institutions, frontier VCs, and strategic corporations are increasingly directing attention to Tier 2 and Tier 3 markets. These underserved regions offer growing demand, untapped talent, and sector-specific innovation in areas such as climate tech, education, and healthtech.

Africa's leap forward will depend not only on infrastructure, but on intentional strategy, shared investment, and a people-first innovation mindset. Unlocking that future requires bold decisions today. For businesses, technology leaders and investors across the continent, the imperative is clear: act early, build collaboratively, and invest strategically.

> *"Africa's digital future won't be inherited ,it must be built. Cloud, AI, and connectivity are not just technologies; they are the levers through which we will foster inclusive growth, local innovation, and lasting transformation."*
>
> **— Obong Idiong, CEO, Heirs Technologies**

07. Appendix

7.1. Research Methodology

This report employs a multi-pronged research design integrating quantitative data analysis, expert interviews and ecosystem mapping to ensure depth and accuracy of insights. The approach includes:

1. Desk Research and Secondary Data Analysis

- **Extensive Source Review:**
  The analysis draws on several authoritative sources such as the World Bank, GSMA, IFC, Statista, BCG, McKinsey, PwC, OECD, and the African Union Digital Strategy documents.

- **Comparative Framework:**
  Data and insights were triangulated across multiple sources to validate findings and identify trends. Readiness indices (e.g., IMF AI Preparedness Index, BCG AI Maturity Matrix), and benchmarks on data center energy consumption, LLM development, and hyperscaler infrastructure were used to contextualise Africa's standing.

2. Quantitative Analysis

- **Data Aggregation:**
  Statistical data such as AI market size, investment volumes, sector-specific growth projections, cloud penetration rates and data center capacity were aggregated from publicly available datasets, proprietary datasets and market dashboards.

- **Cross Validation:**
  Key metrics were cross-checked across independent sources (e.g., McKinsey, DataCenterMap, GSMA, OECD AI) to ensure reliability and minimise bias.

- **Visualisation:**
  Quantitative findings were presented through infographics, tables, and charts to ensure clear benchmarking and comparative analysis.

3. Qualitative Expert Interviews

- **Targeted Stakeholder Engagement:**
  Semi-structured interviews were conducted with Founders, CEOs, and executives from leading infrastructure providers and AI startups across Africa's digital ecosystem.

- **Qualitative Insights:**
  We analysed interview responses to contextualise quantitative findings, surface emerging trends, and capture ground-level perspectives on adoption barriers, regulatory shifts, and market opportunities.

4. Ecosystem and Sector-mapping

- AI and Cloud investment trends were mapped geographically and sectorally to highlight concentration zones, key markets, and disparities in readiness. Key infrastructure rollouts (e.g. 2Africa cable, Oracle's Morocco cloud zones, Equiano project) were tracked for regional impact.

5. Ethical Standards

- **Attribution:**
  All data points and insights are expressly referenced or hyperlinked for transparency, allowing readers to verify and further explore original sources.

- **Objectivity:**
  The report maintains a neutral, evidence-based tone, presenting both opportunities and challenges in Africa's digital transformation journey.

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08.
About Us

Driving Africa's Digital Transformation

Heirs Technologies is a next-generation African technology company on a mission to power businesses across the continentwith intelligent, sustainable, and locally relevant solutions. Amember of the Heirs Holdings Group, one of Africa's mostprominent investment conglomerates with presence in 24countries across four continents, Heirs Technologies combinesglobal delivery standards with deep local market intelligence. Our vision is to be Africa's most trusted digital transformationpartner, delivering agile, scalable, and measurable outcomesthat modernise operations, unlock efficiencies, and fuel digitaleconomies.

Headquartered in Lagos, Nigeria, Heirs Technologies offers end-to-end services in business transformation & consulting, cloudinfrastructure, software licensing & renewals, managed ITservices, and AI-powered product innovation. Our ERP solution,Heirs Converge, is an AI-powered Enterprise Resource Planningplatform designed specifically for African businesses, enablingorganisations to save time, reduce costs, and unlockunprecedented levels of efficiency and growth.

Our differentiation lies in our ability to merge strategic advisorywith hands-on execution, enabled by premium partnershipswith leading OEMs, including Microsoft, Oracle, Huawei, Dell,VMware, and Salesforce. Backed by the enterprise reach ofHeirs Holdings, we bring transformational value to clients acrossfinancial services, public institutions, manufacturing, utilities, and beyond.

From reducing IT incidents by 40% to cutting cloudinfrastructure costs by up to 50%, Heirs Technologies is settinga new benchmark for Africa-first innovation.

Let's build the future of African business together!

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