Digital Infra Leaders Summit

AFRICA 2024 EXECUTIVE SUMMARY

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Exclusive invitation-only executive-level workshops held alongside major events, the Digital Infra Leaders Summits have become a highlight on the calendar of digital infra CEOs and industry VIPs.

Held in Nairobi in October 2024, alongside ITW Africa, Datacloud Africa and TowerXchange Meetup Africa, the African Digital Infra Leaders Summit brought together 30 of the most influential stakeholders in African digital infrastructure and connectivity to tackle the main industry challenges the sector faces.

Having each completed a short anonymised survey ahead of the workshops, analysis of the results was used to help structure and stimulate debate and discussion during the session.

In this Executive Summary, we share with you the main take homes from the session as well as the outcomes of the sentiment analysis

Participating organisations included:

AIIM, Amane Towers, American Tower, Atlas Tower, CMC Networks, Convergence Partners, Digital Realty, Google, Helios Towers, icolo.io, iXAfrica DataCentre, Liquid Intelligent Technologies, Meta, MAST, Open Access Data Centres, Orange, Paratus, Raxio, SBA, Seacom

Key discussion areas included:

- Evolving investor sentiment in digital infrastructure asset classes
- Key industry growth drivers and headwinds
- Strategic priorities for the upcoming year
- Priorities for capex allocation
- Business model evolution
- M&A expectations and drivers
- Collaborative activities that should be considered
- The short- and long-term impact of satellite technologies
- The impact of AI on both growth and internal processes
- Ensuring access to affordable, sustainable power

Interested in participating in future workshops?

Contact Digital Infra Leaders' Summit Director, Laura Graves to enquire about eligibility and availability.

E: lgraves@techoraco.com

Top 10 takeaways

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1. Optimism in the African digital infrastructure sector is high, although slightly down on 2023 sentiment. The direction of travel in the industry is overwhelmingly positive underpinned by macroeconomic drivers, but with high levels of execution risk in Africa, the speed of travel can fall behind expectations
2. Upward revisions in network traffic forecasts have been seen across the continent, demonstrating that the high growth expectations for the region are rooted in reality
3. Lack of capital is a significant red flag for the industry and there is a pressing need to retool the investment model and grow the pool of available capital. PE funds have been popular, but attracting REITs will be key
4. It is imperative that the right financial instruments are used to fit investment opportunities, with concerns that there has often been a mismatch to date.
5. Recent subsea disruptions have highlighted resiliency gaps in Africa's network infrastructure and channelled increased focus into terrestrial fibre deployments. With fibre economics remaining challenging, collaboration in rollout is critical.
6. The role of satcom will continue to grow, although most believe it will never offer a true full backbone alternative. As satcom's pervasiveness increases, leaders expect discussions to become increasingly political.
7. For towercos and data centres in particular, energy is a critical challenge. 84% of leaders stated that improving energy efficiency was a top or high strategic priority, with energy being the highest priority for capex allocation amongst attendees.
8. Whilst the industry faces an energy trilemma of reliability, low cost and sustainability, reliability and cost are the immediate priorities given the rapid scaling of digital infrastructure
9. Vertical integration of supply chains is viewed as an important strategy by leaders, particularly in regards to energy security
10. Improved collaboration between energy and ICT ministries is desirable to address the barriers to digitalisation and electrification of the continent


Ed Stumpf

Optimism, whilst still high, has slightly reduced since last year

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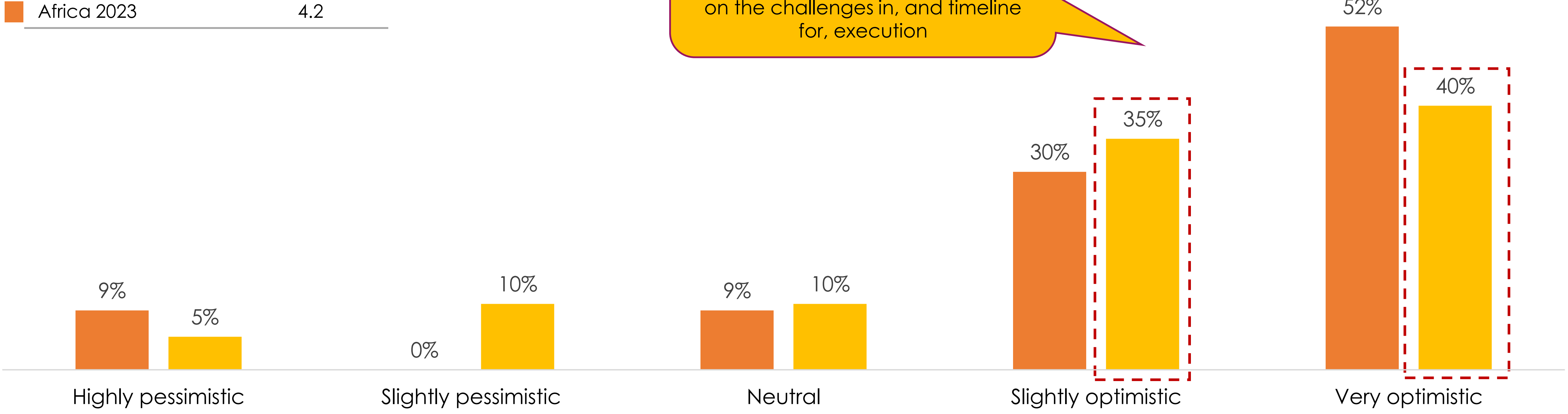
How optimistic are you on the outlook for the digital infrastructure sector in Africa?

Legend	Avg. score
Africa 2024	**4**
Africa 2023	4.2

View from the Summit
Optimism remains as bullish as 2023, however there is increasing realism on the challenges in, and timeline for, execution



Note: n (Africa,2023) = 23; n (Africa, 2024) = 20; May not add up to null responses provided

Optimism ranks below APAC, MENA and Europe

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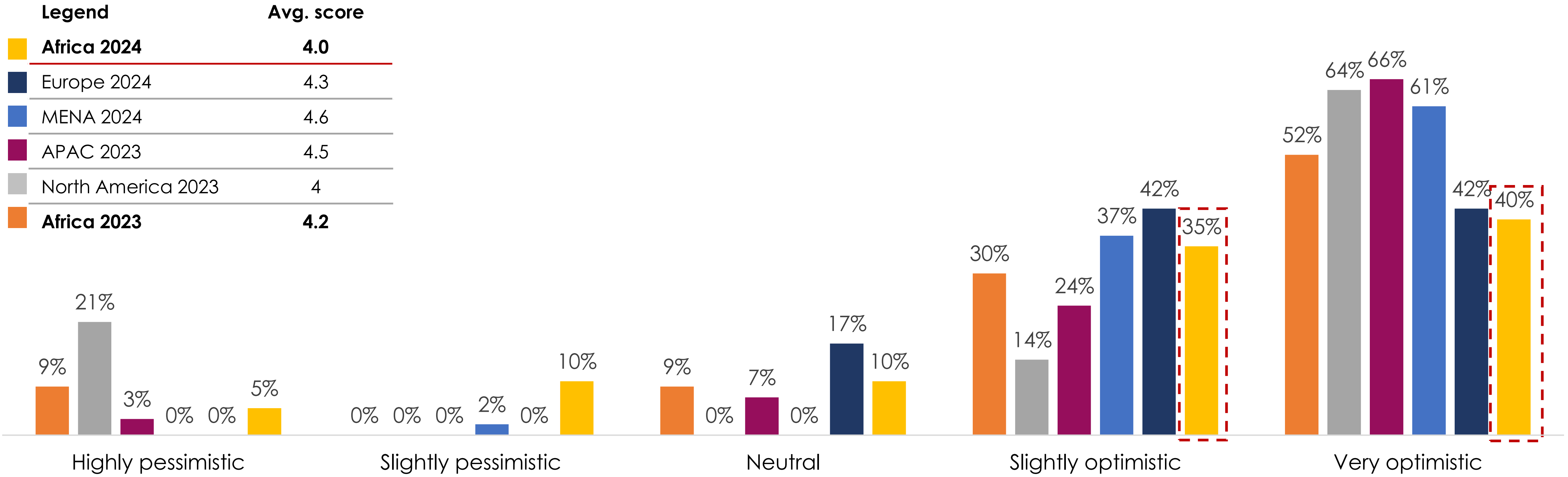
How optimistic are you on the outlook for the digital infrastructure sector in Africa?



Note: n (Africa, 2024) = 20; n (Europe, 2024) = 24; n (NA, 2023) = 14; n (Africa,2023) = 23; n (APAC,2023) = 29; n (MENA,2024) = 41; May not add up to null responses provided

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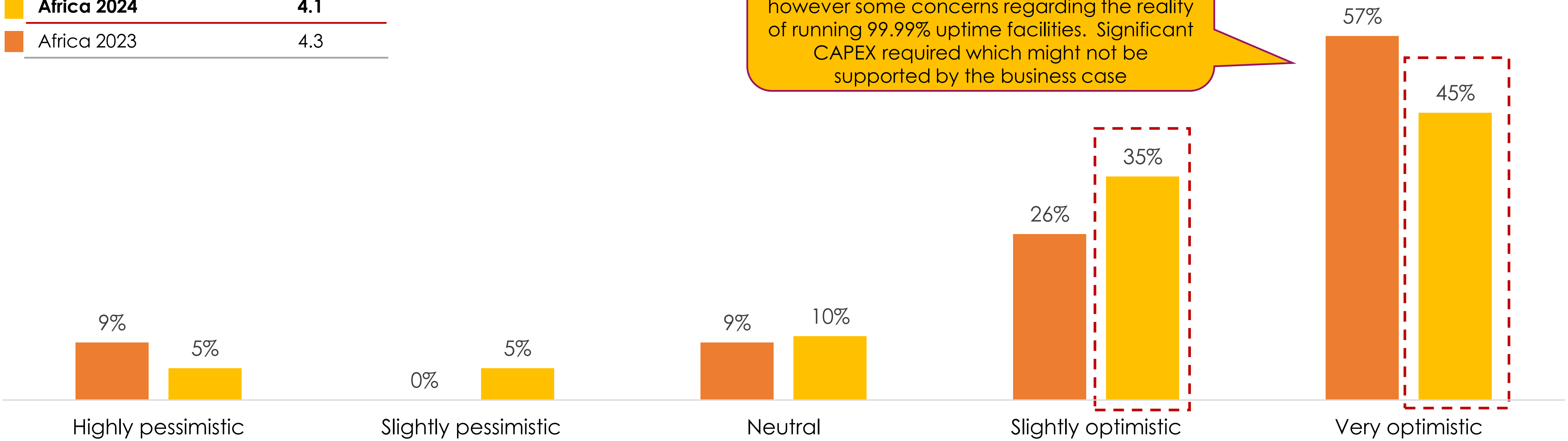
Optimism in data centres is high

How optimistic are you on the outlook for the data centre sector in Africa?

Legend	Avg. score
Africa 2024	**4.1**
Africa 2023	4.3

View from the Summit
Optimism is strong regarding the opportunity, however some concerns regarding the reality of running 99.99% uptime facilities. Significant CAPEX required which might not be supported by the business case

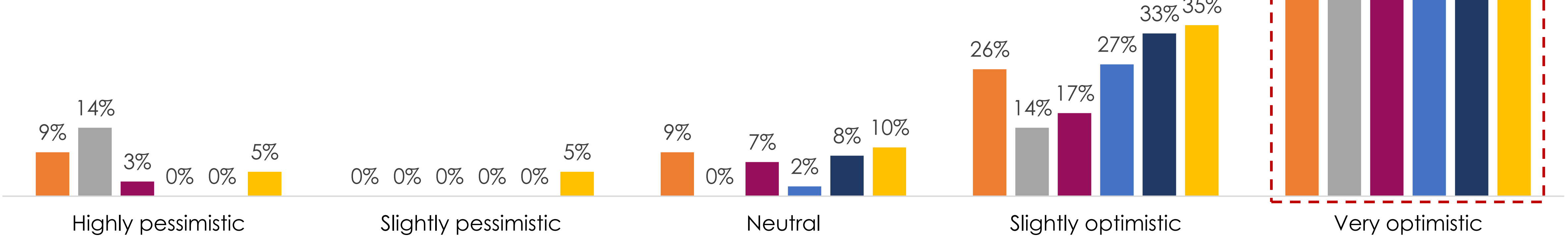


Note: n (Africa,2023) = 23; n (Africa, 2024) = 20; May not add up to null responses provided

Although lower than other regions

How optimistic are you on the outlook for the data centre sector?

Legend	Avg. score
Africa 2024	**4.1**
Europe 2024	4.5
MENA 2024	4.5
APAC 2023	4.5
North America 2023	4.3
Africa 2023	**4.3**



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Optimism in the fibre sector has increased

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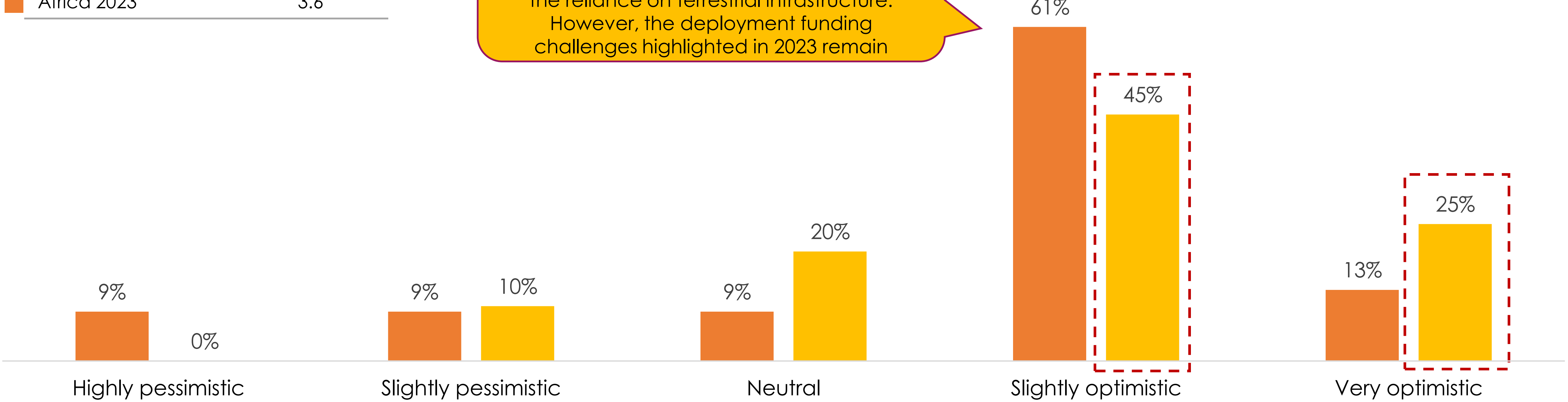
How optimistic are you on the outlook for the terrestrial fibre sector in Africa?

Legend	Avg. score
Africa 2024	**3.9**
Africa 2023	3.6

View from the Summit
Disruptions to subsea cable due to multiple cuts over the last 18 months have increased the reliance on terrestrial infrastructure. However, the deployment funding challenges highlighted in 2023 remain



Note: n (Africa,2023) = 23; n (Africa, 2024) = 20; May not add up to null responses provided

Plus Africa ranks above other regions in terms of fibre attractiveness

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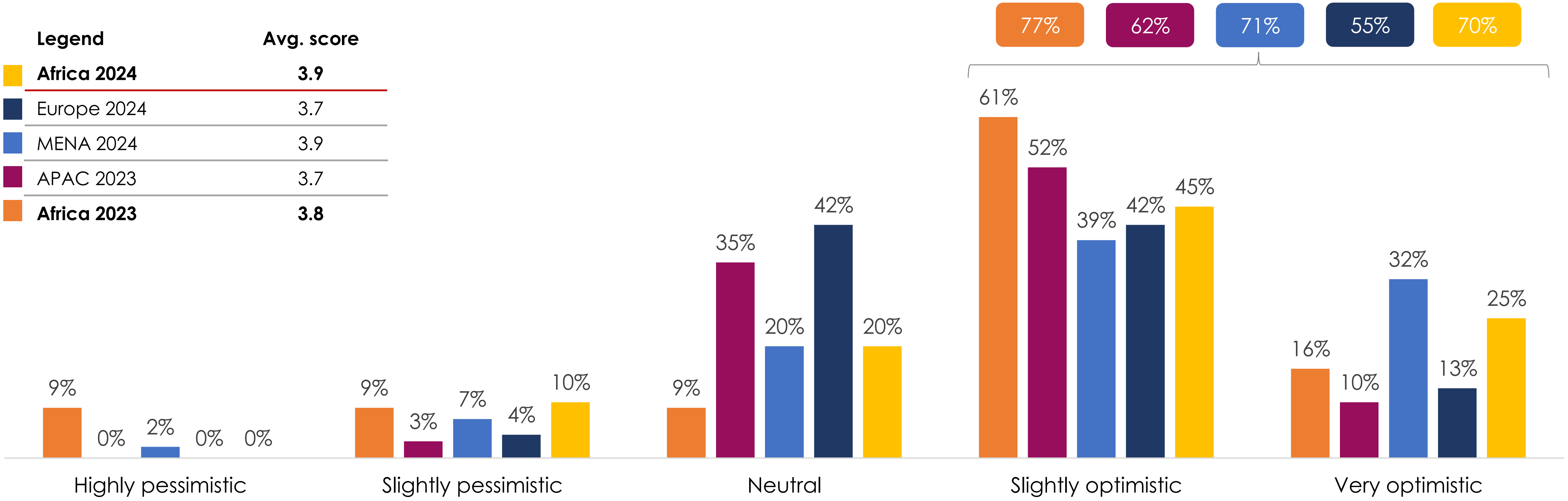
How optimistic are you on the outlook for the terrestrial fibre sector in Africa?

Legend	Avg. score
Africa 2024	**3.9**
Europe 2024	3.7
MENA 2024	3.9
APAC 2023	3.7
Africa 2023	**3.8**



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And subsea? 70% of all respondents are slightly or very optimistic about subsea…

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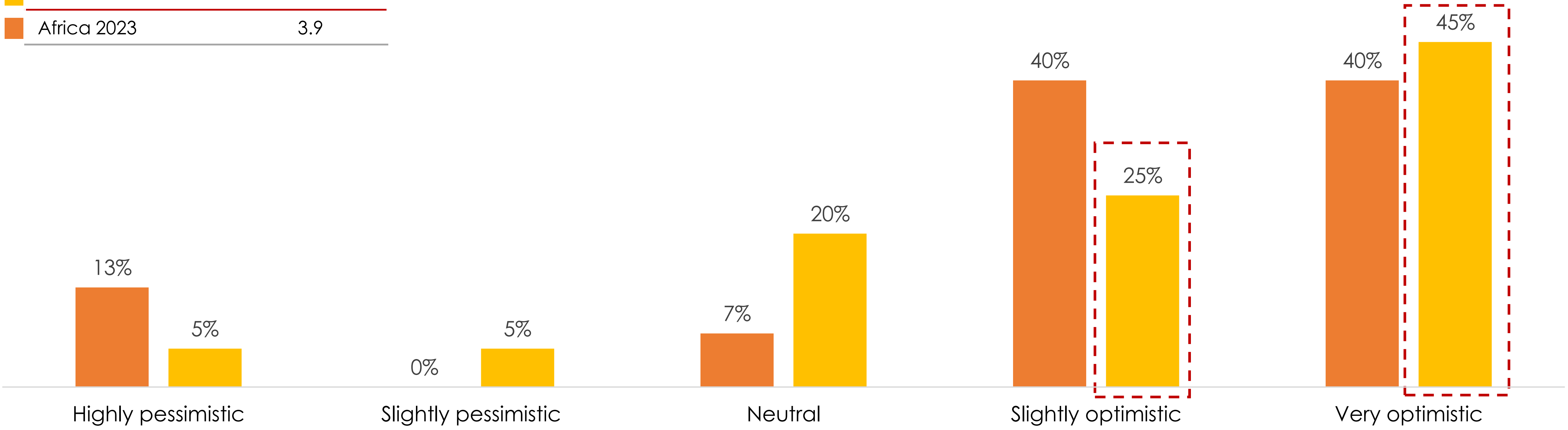
How optimistic are you on the outlook for the subsea sector in Africa?

What is driving the optimism for subsea in Africa?

Legend	Avg. score
Africa 2024	**4.0**
Africa 2023	3.9



Note: n (Africa,2023) = 23; n (Africa, 2024) = 20; May not add up to null responses provided

… making it the region of most optimism for subsea cable

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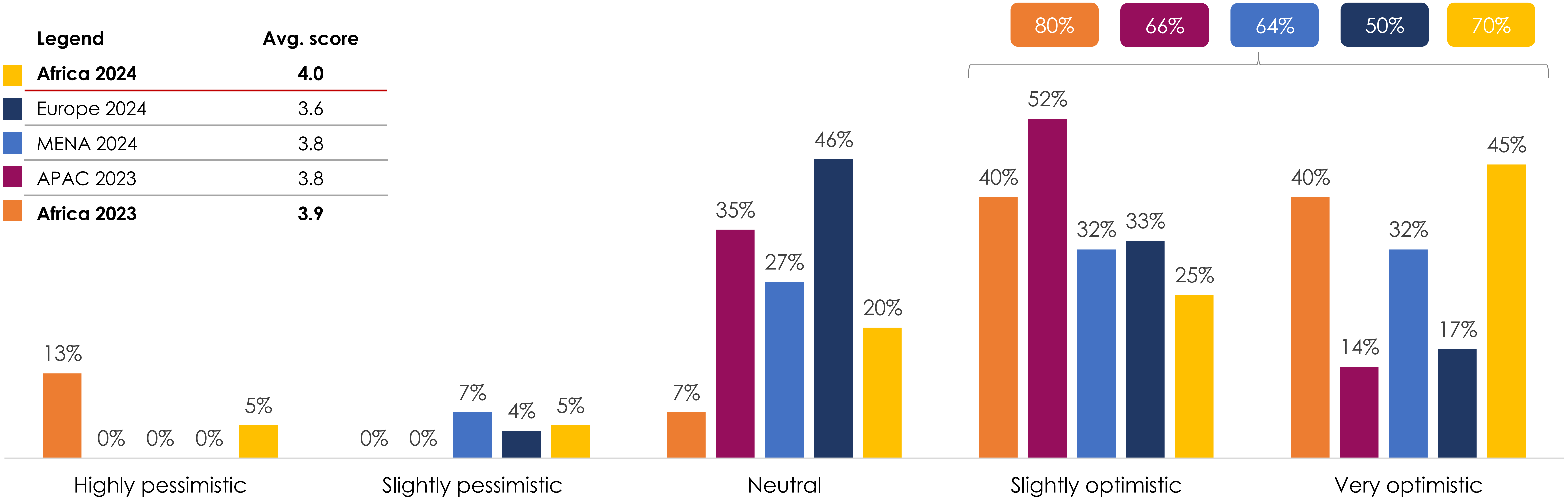
How optimistic are you on the outlook for the subsea cable sector in Africa?

Legend	Avg. score
Africa 2024	**4.0**
Europe 2024	3.6
MENA 2024	3.8
APAC 2023	3.8
Africa 2023	**3.9**



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Looking into the future, cloud services, Geopolitical & regulatory changes and Big data are the main growth drivers

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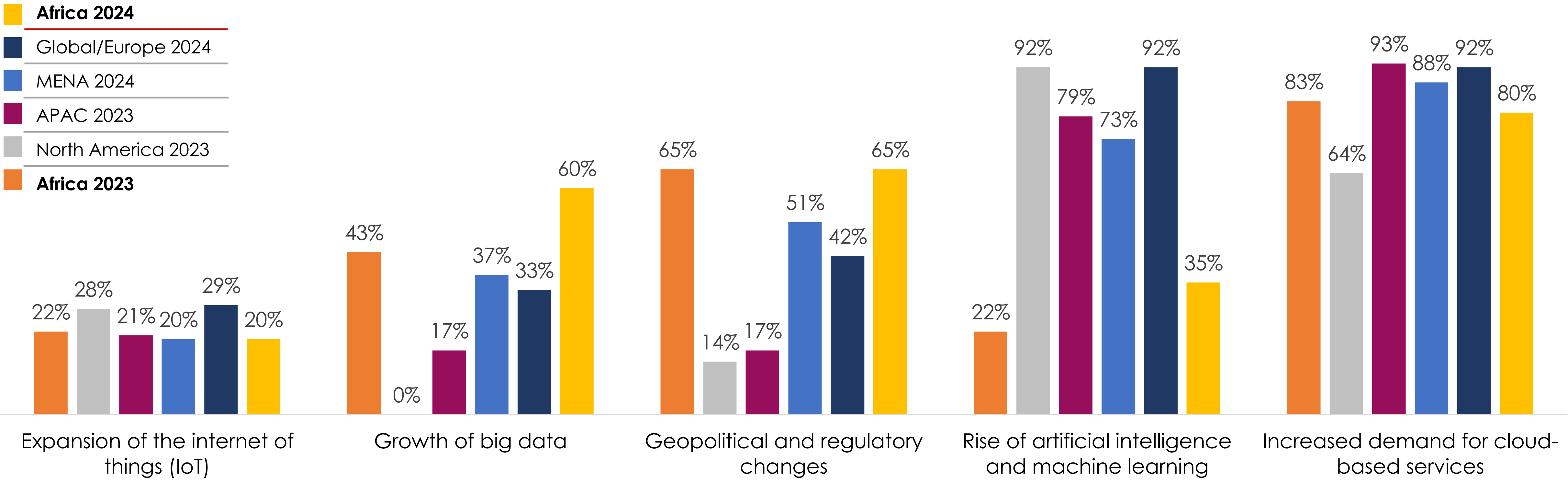
In your opinion, what are the key drivers for the growth of the digital infrastructure market in 2024-2025? (% of respondents that agree the area is a key growth driver)



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SatCom is increasingly relevant, particularly for expanding rural broadband access

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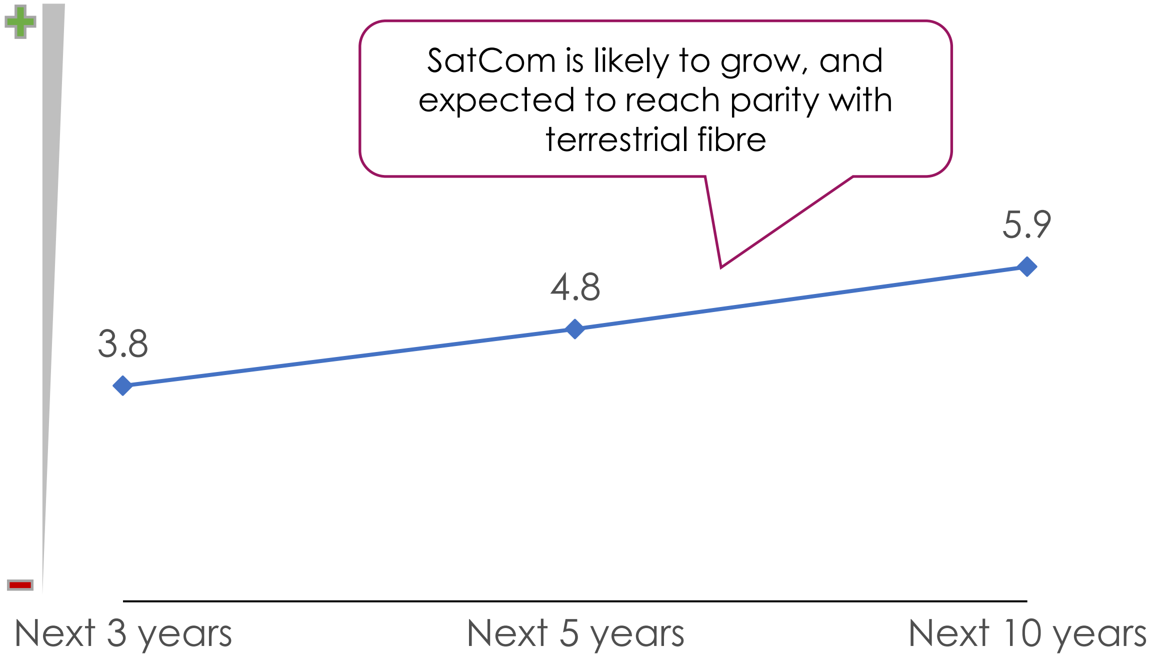
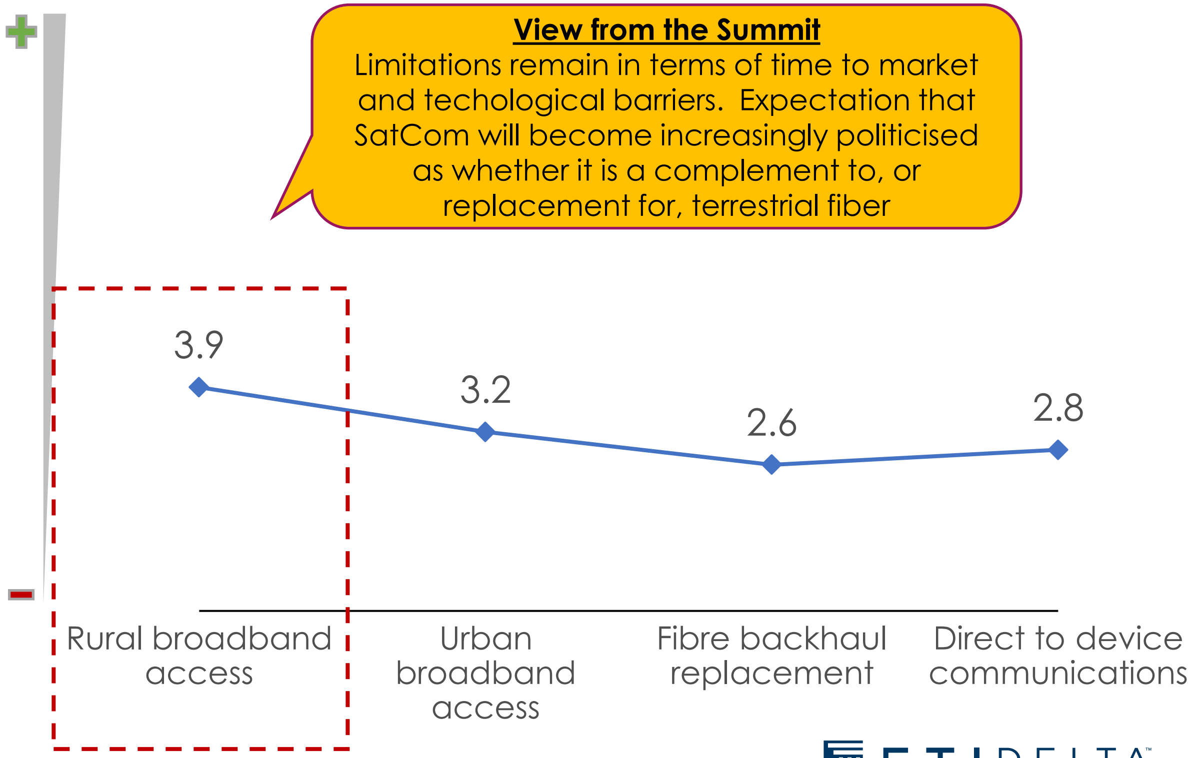
How pervasive do you foresee SatCom becoming relative to fibre in the next years?

(1 = very low, 5 = equal to terrestrial fibre, 10 = replacing terrestrial fibre)



How common do you believe the following satellite applications will become in Africa?

(Score 1-5; 1 = uncommon, 5=widespread)



Note: n (Africa, 2024) = 20; May not add up to null responses provided

Providing reliable and affordable solutions for all population is critical

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Within the digital infrastructure sector, what is the top priority for the next 12 months to prevent further development of a digital divide?

- Increasing access to reliable and affordable Broadband
- Managing Macro and Geopolitical Risks, including forex and regulation
- Rollout of affordable solutions and good regulatory practices
- Rural connectivity
- Public Sector and Telecoms Sector engagements for focused developments and investments
- Partnerships in the Satellite Space

Note: n (Africa) = 20; May not add up to 100% due to rounding and/or null responses provided

Investor sentiment has reduced in Africa over the past 12 months

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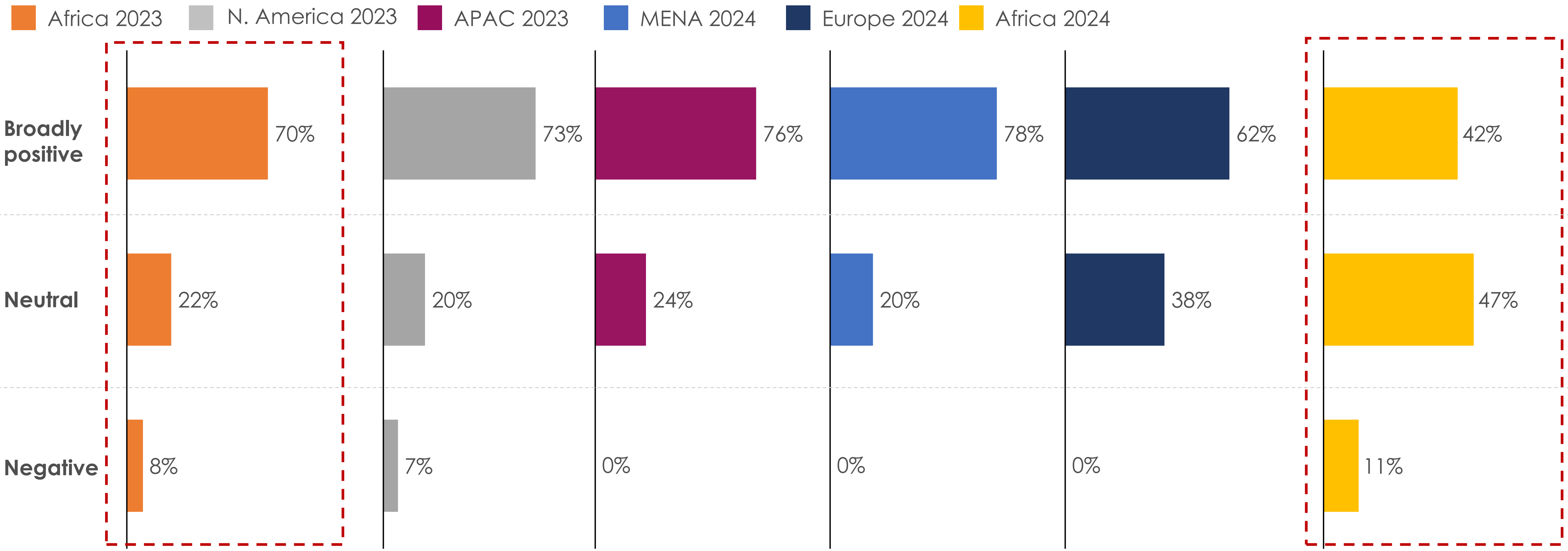
To the best of your knowledge, in Africa, what is the overall investor sentiment, considering capital to be deployed in digital infrastructure over 2024-2025?



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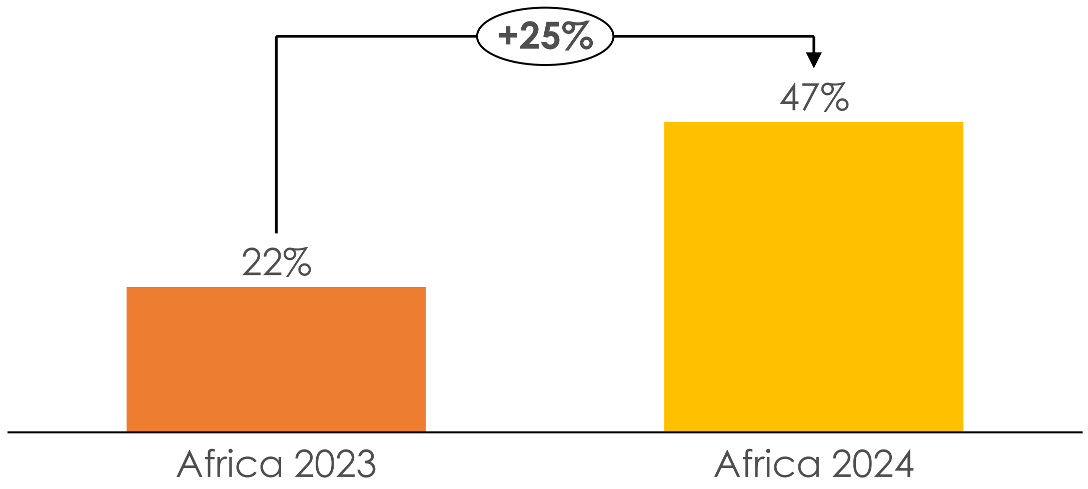
There has been a 25% shift from “positive” to “neutral”

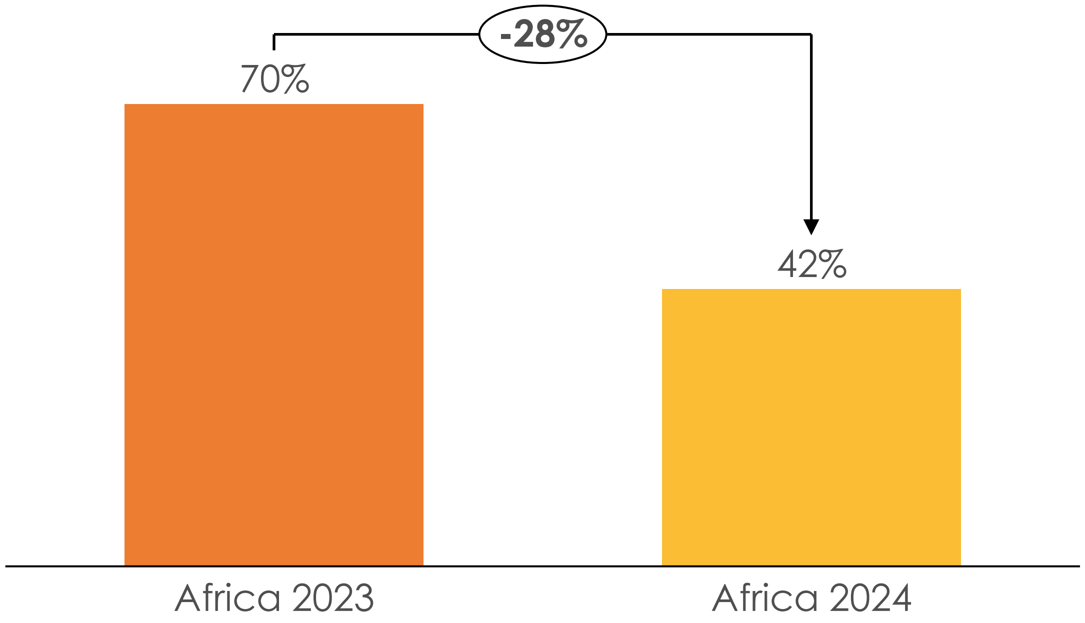
To the best of your knowledge, in Africa, what is the overall investor sentiment, considering capital to be deployed in digital infrastructure over 2024-2025?

Legend
- **Africa 2024**
- Africa 2023

Neutral



Broadly positive



Explanations provided by the participants on the following slides

Note: n (Africa,2023) = 23; n (Africa, 2024) = 20; May not add up to null responses provided

There is a diverse view when it comes to anticipation of M&A

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What level of digital infrastructure industry M&A are you anticipating for 2024?
(Very low, Low, Moderate, High, Very High)

	Very low	Low	Moderate	High	Very high	Weight. Avg.
Data centres	11%	26%	26%	37%	0%	2.9
Terrestrial fibre	5%	47%	32%	16%	0%	2.6
Mobile towers	5%	15%	40%	40%	0%	3.2
Mobile access networks / MNOs	26%	42%	16%	16%	0%	2.2
Subsea cable	32%	32%	21%	16%	0%	2.2
Satellite	11%	16%	42%	26%	5%	3.0

Note: n (Africa,2023) = 23; n (Africa, 2024) = 20; May not add up to null responses provided

What did you tell us?

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What is the overall investor sentiment, considering capital to be deployed in digital infrastructure over 2024-2025?

Youthful population will continue driving demand

Significant capital available for digital infrastructure, coming from both commercial and development finance institutions

The regulatory environment across many African countries is increasingly favorable for Digital Infra

Only specialist Africa-focused funds are likely to find viable opportunities and navigate the complex landscape

Existing challenges from macroeconomic and geopolitical risks will continue

Investor sentiment is cautious, with a focus on sustainable returns

Note: n (Africa, 2024) = 20. May not add up to 100% due to rounding and/or null responses provided

Data centre has reduced in attractiveness for investment in the past 12 months – why?

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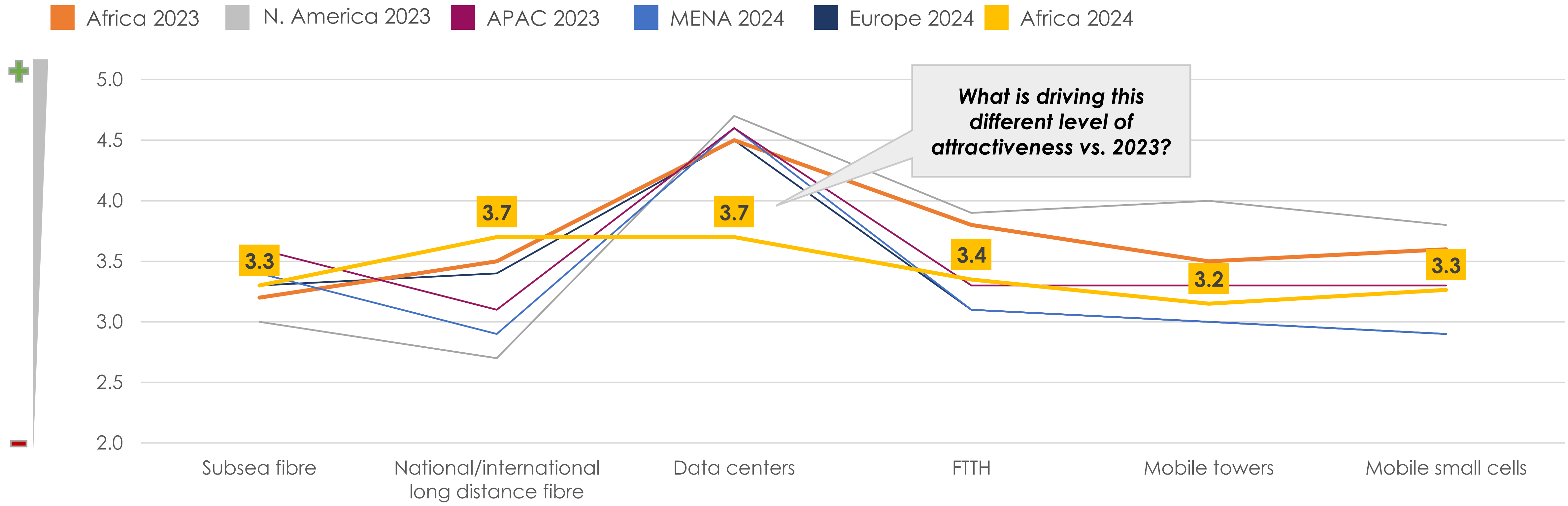
How attractive do you see digital infrastructure classes in Africa for investment over the next three years? (score 1-5, with 1 = low, 5 = high)



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…with sustained attractiveness expected to increase steadily over the next three years compared to last year

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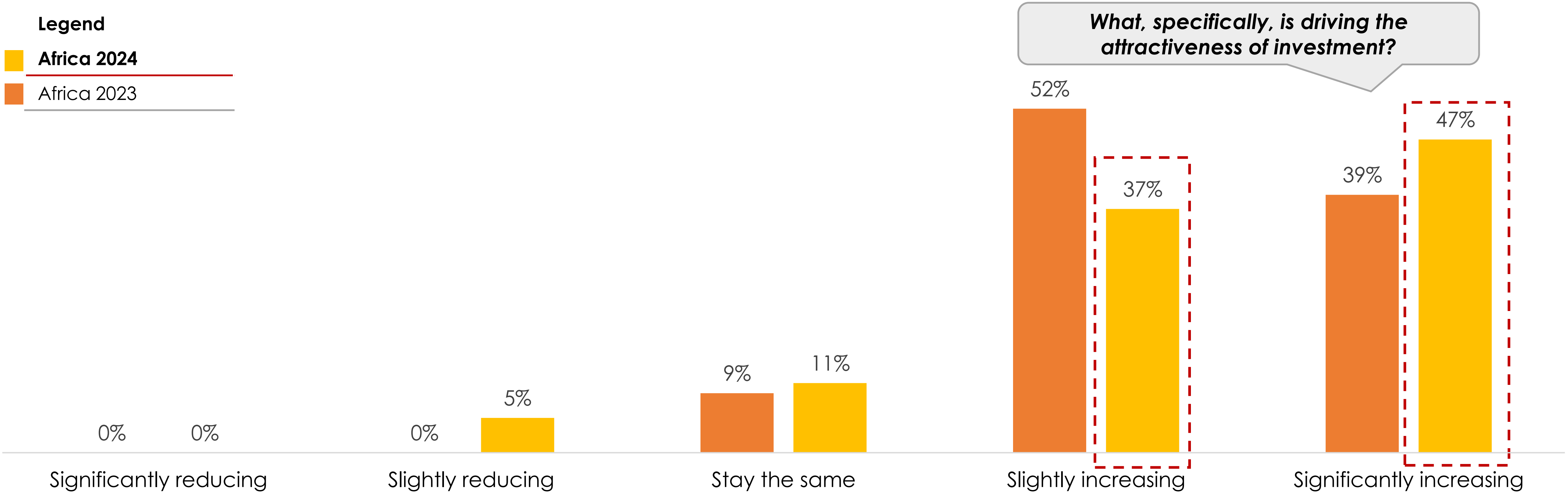
How do you see the attractiveness of data centre investment in Africa evolving over the next three years vs. today?



Note: n (Africa,2023) = 23; n (Africa, 2024) = 20; May not add up to null responses provided

Still, the increase in attractiveness is marginally less than other regions

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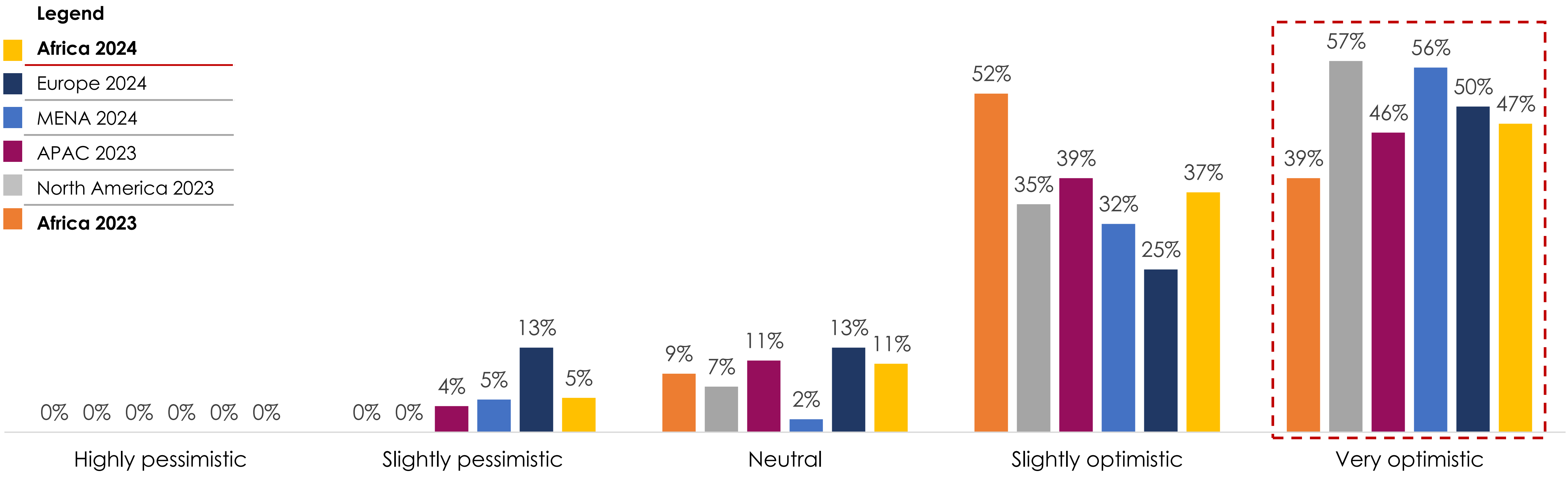
How do you see the attractiveness of data centre investment in Africa evolving over the next three years vs. today?



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You see that regulator requirement for local data storage are driving up data centre demand capacity

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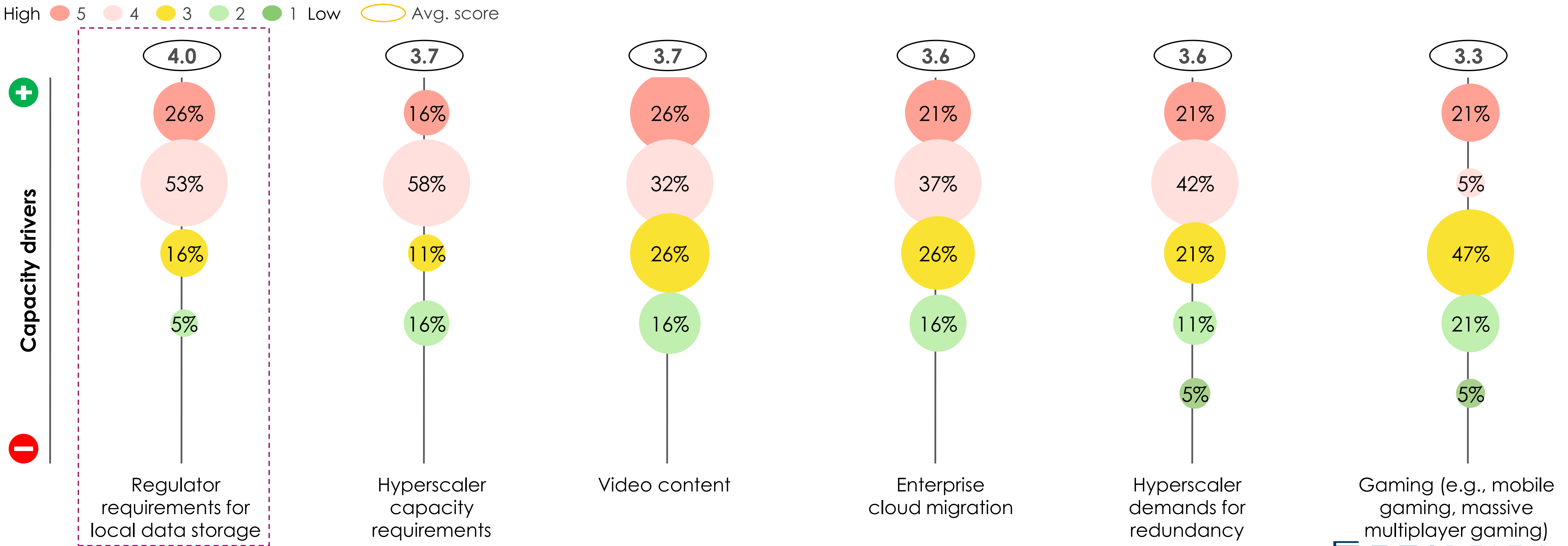
How will the relevance of the following data centre demand capacity factors change over 2024-2025?

(5 – very relevant, 1 – not relevant)



Note: n (Africa, 2024) = 20; May not add up to 100% due to rounding and/or null responses provided

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Long-term WS colocation, and Edge data centres will attract the most capital

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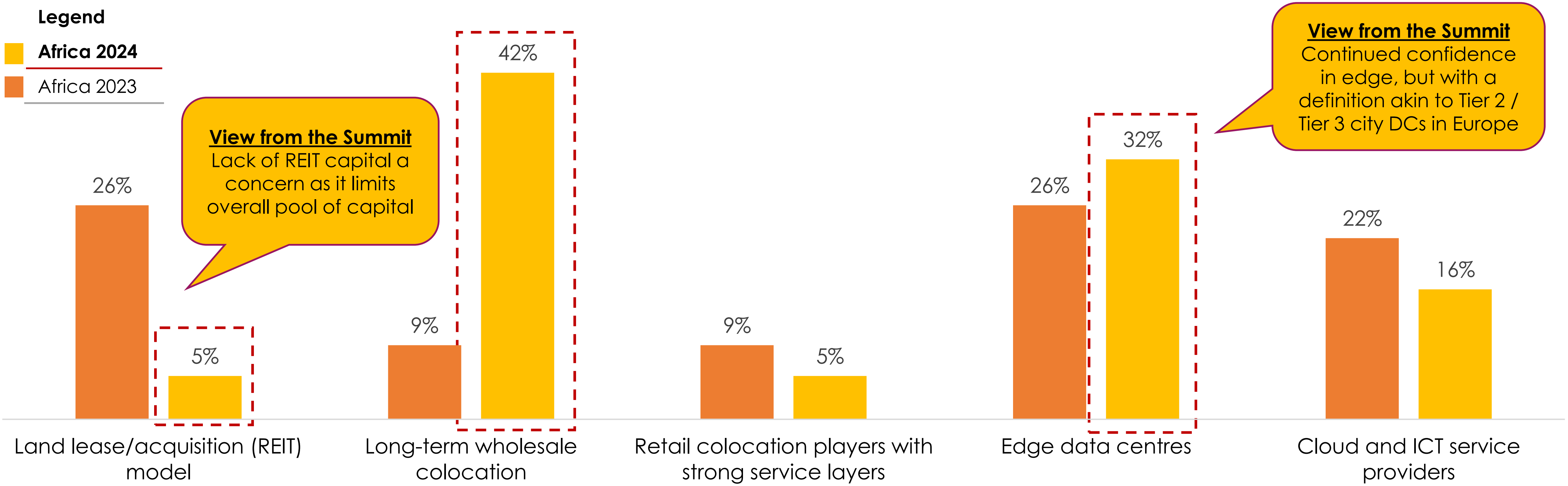
Which part of data centre market value chain will attract most capital in 2024-2025?



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Driving a significant change from REIT to WS colocation + Edge Data Centres

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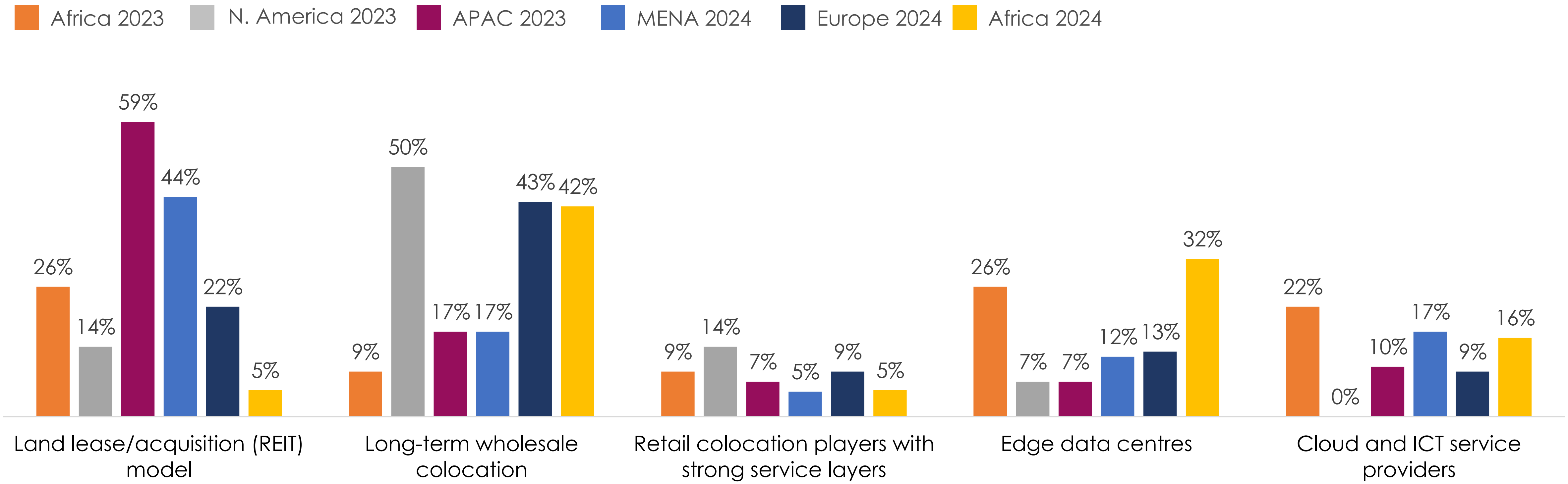
Which part of data centre market value chain will attract most capital in 2024-2025?



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Financial investors continue to be most commonly seen as main providers of financing

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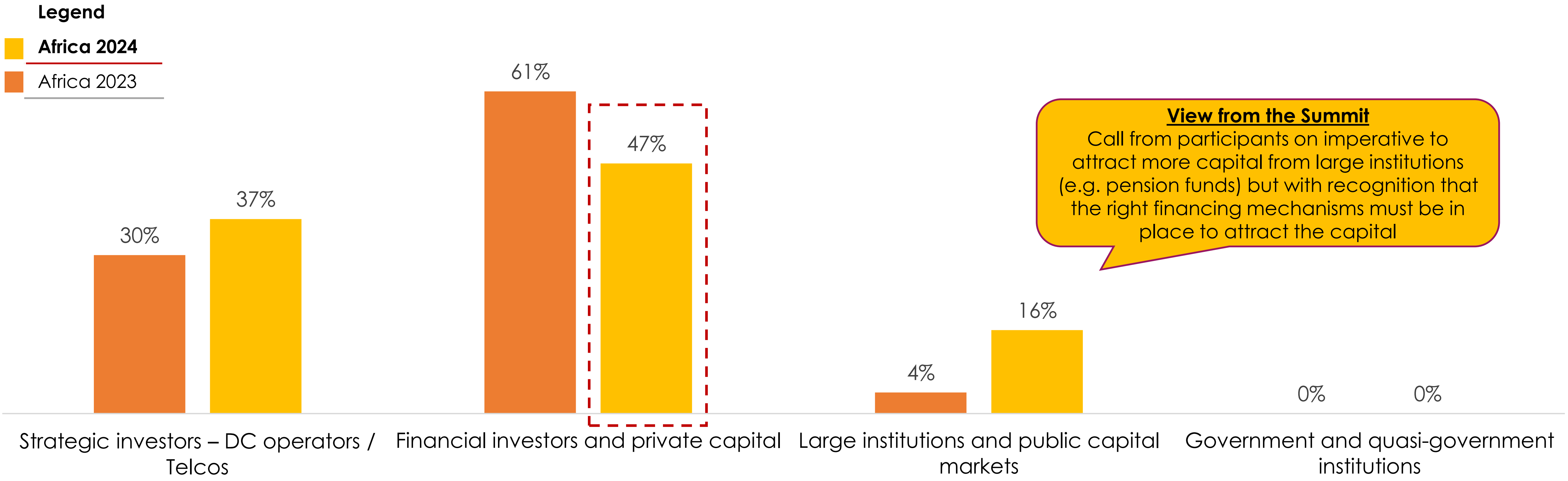
What do you see as the main providers of capital for data centres in Africa in 2024-2025?



View from the Summit
Call from participants on imperative to attract more capital from large institutions (e.g. pension funds) but with recognition that the right financing mechanisms must be in place to attract the capital

Note: n (Europe, 2024) = 24; n (Africa, 2024) = 20; n (NA, 2023) = 14; n (Africa,2023) = 23; n (APAC,2023) = 29; n (MENA,2024) = 41; May not add up to null responses provided

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Volatility of macro environment and the increase in the cost of financing are the greatest challenges

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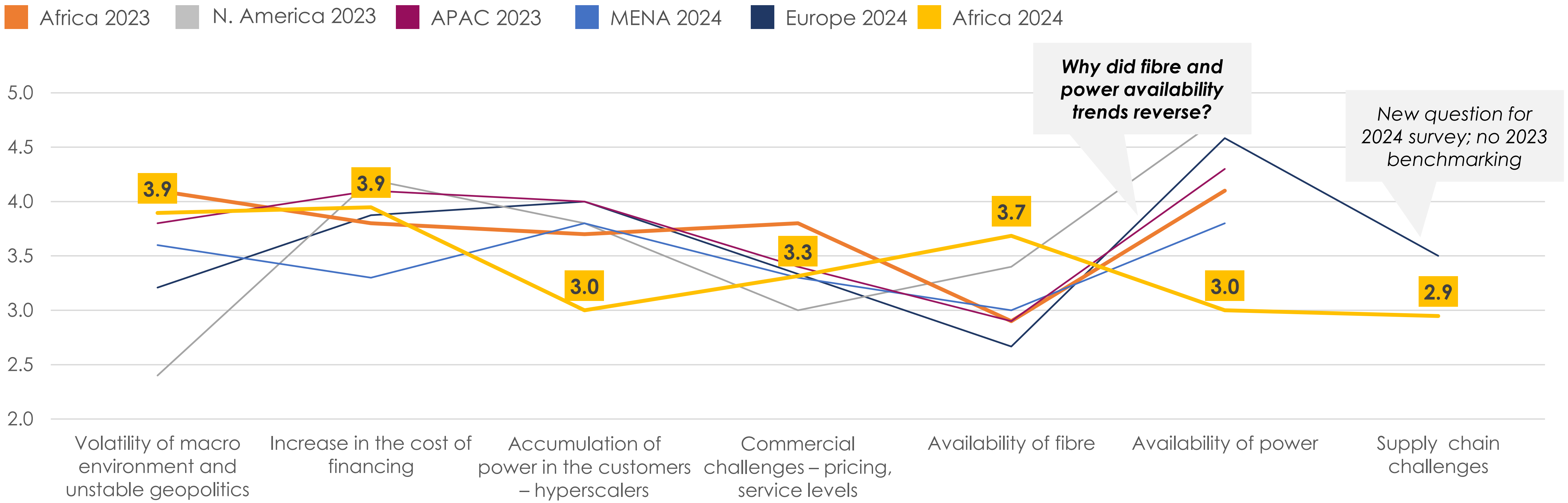
What are the key challenges facing data centre investors in Africa?
(score 1-5, with 1 = low, 5 =high)



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Geographical presence, footprint and scale elements of the DC business model are expected to change the most

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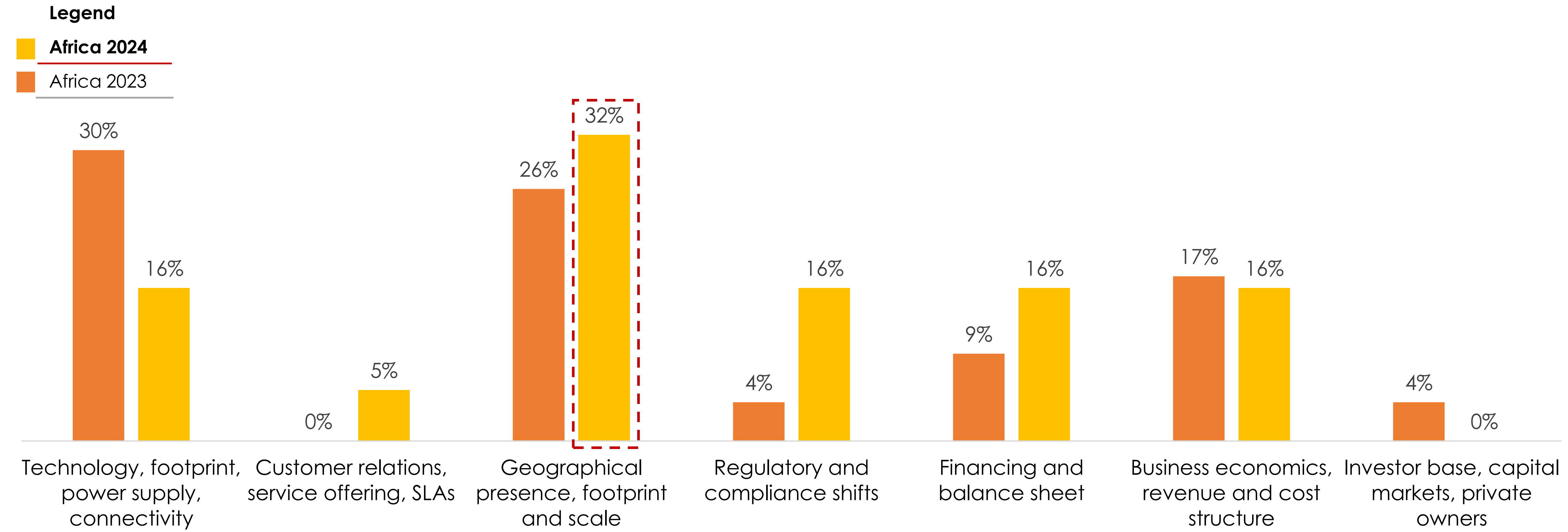
In your opinion, which parts of the DC business model will change the most in 2024-2025?



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~80% of respondents think that attractiveness of terrestrial fibre investment is increasing

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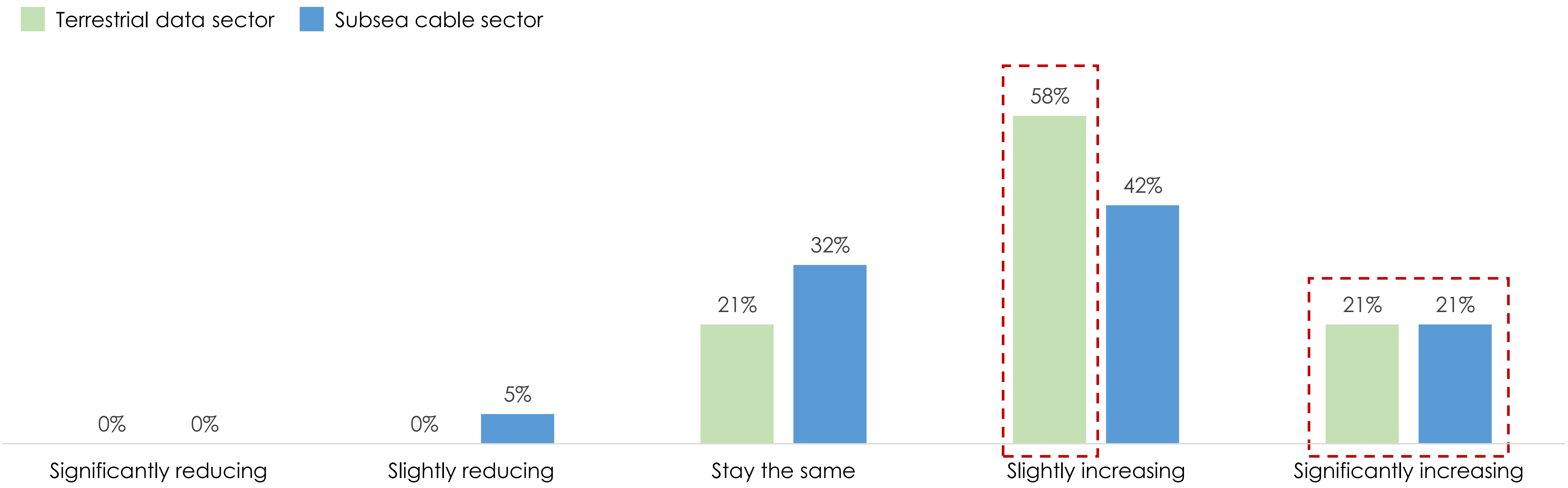
How do you see the attractiveness of terrestrial or subsea fibre investment in Africa evolve over the next three years vs. today?



Note: n (Africa,2023) = 23; n (Africa, 2024) = 20; May not add up to null responses provided

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For terrestrial fibre, primary sources of capital are expected to be strategic & financial

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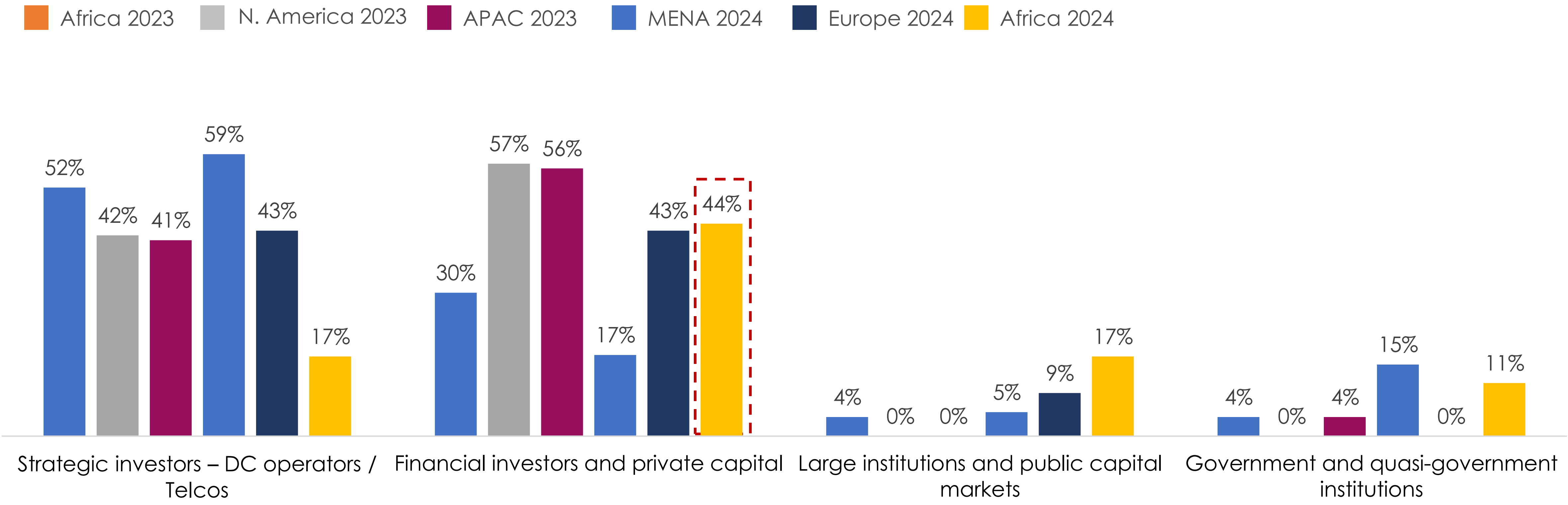
What do you see as the main providers of capital for terrestrial fibre in Africa 2024-2025?



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The relative impact of challenges is consistent across terrestrial and subsea

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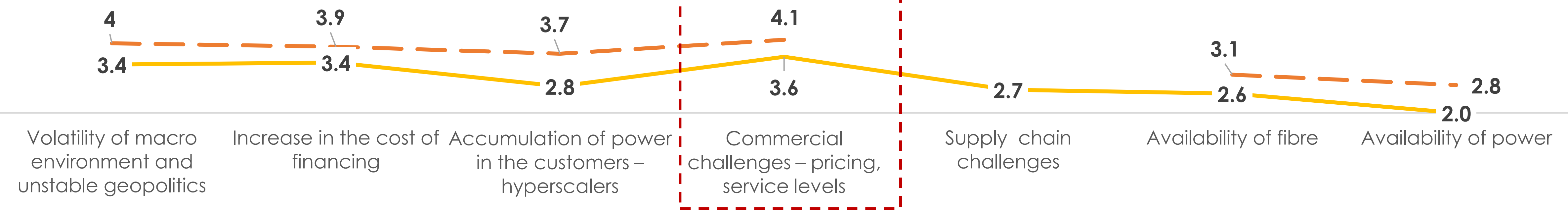
Africa 2024
Africa 2023

1 What are the key challenges facing terrestrial fibre investors in Africa?
(score 1-5, with 1 = low, 5 = high)

2 What are the key challenges facing subsea fibre investors in Africa?
(score 1-5, with 1 = low, 5 = high)



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Deep dive: For terrestrial fibre, increase in the cost of financing and commercials are the key challenges

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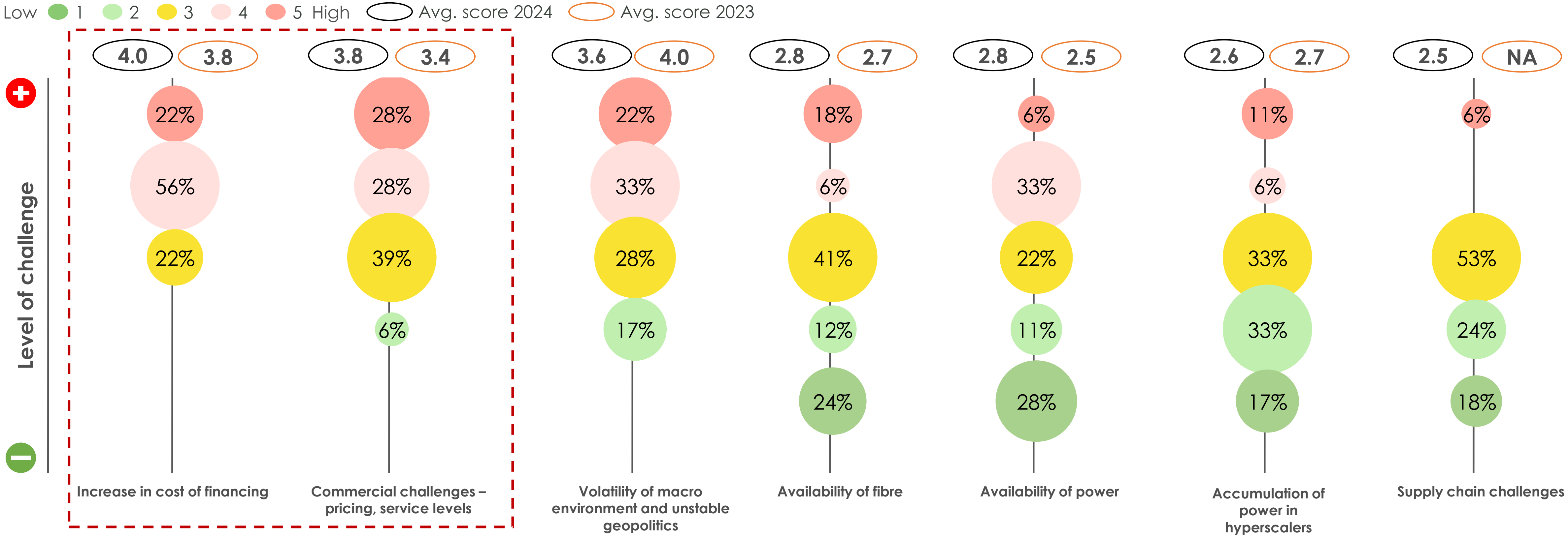
What are the key challenges facing terrestrial fibre investors in Africa?

(score 1-5, with 1 = low, 5 = high)



Note: n (Africa, 2024) = 20; n(Africa,2023) = 23; May not add up to null responses provided

Deep dive: for subsea, commercials challenges are the key challenges

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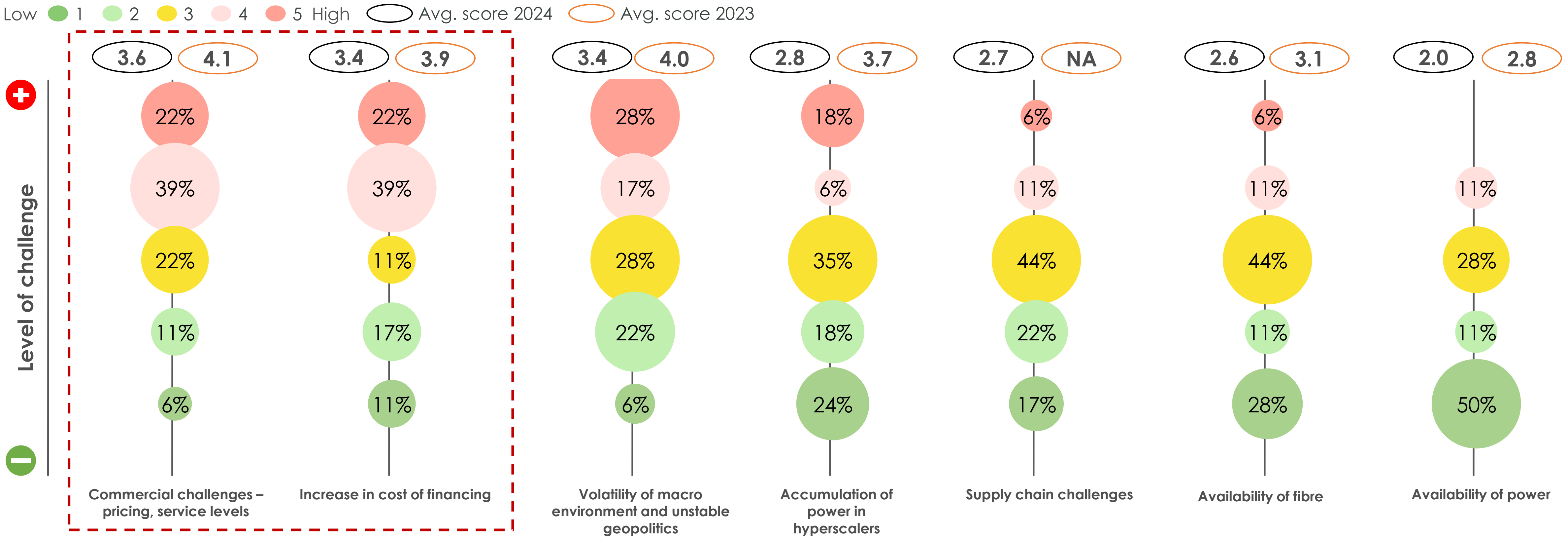
What are the key challenges facing subsea cable investors in Africa?

(score 1-5, with 1 = low, 5 = high)



Note: n (Africa, 2024) = 20; n(Africa,2023) = 23; May not add up to null responses provided

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~60% of respondents think that attractiveness of mobile tower investment is staying the same

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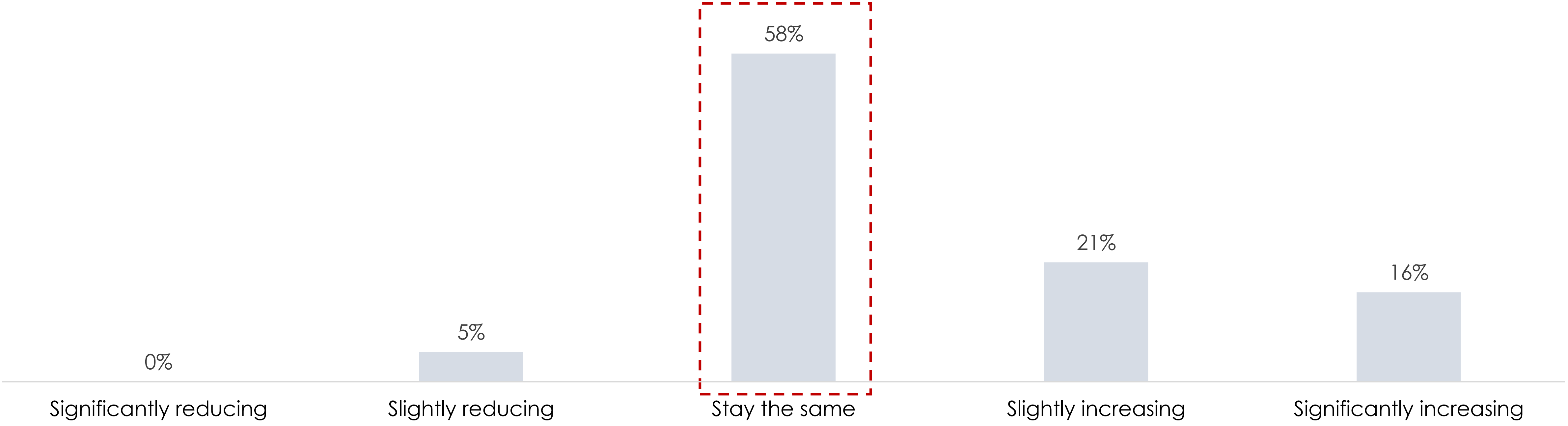
How do you see the attractiveness of mobile tower investment in Africa evolving over the next three years vs. today?



Note: n (Africa,2023) = 23; n (Africa, 2024) = 20; May not add up to null responses provided

The key challenge facing across mobile tower digital asset is the increase in the cost of financing

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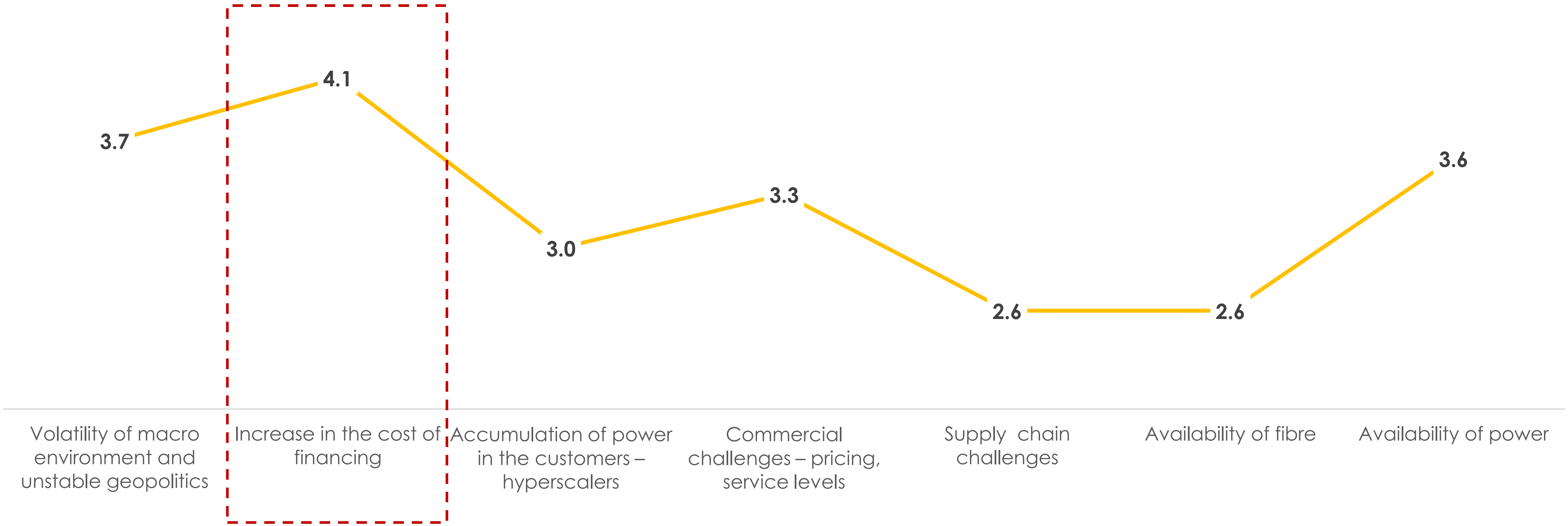
1 **What are the key challenges facing mobile tower in Africa?**
(score 1-5, with 1 = low, 5 = high)

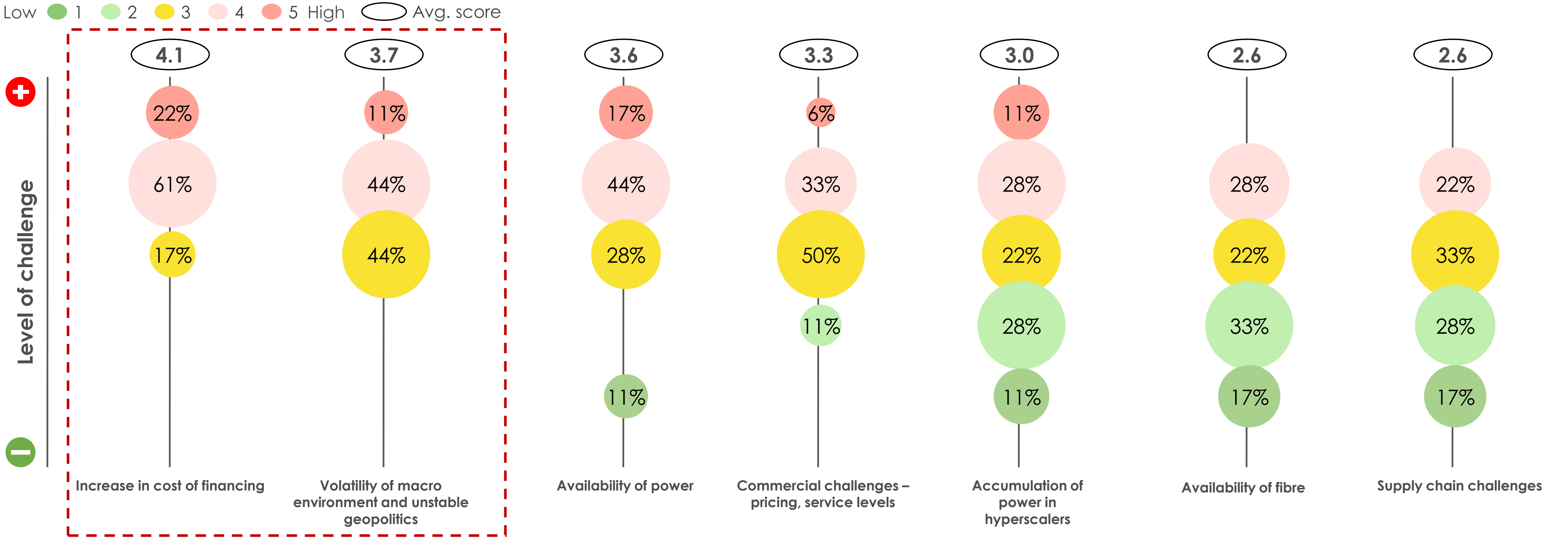


Note: n (Africa, 2024) = 20; n(Africa,2023) = 23; May not add up to null responses provided

Deep dive: For mobile tower, increase in the cost of financing and volatility of macro environment are the key challenges

Digital Infra Leaders Summit

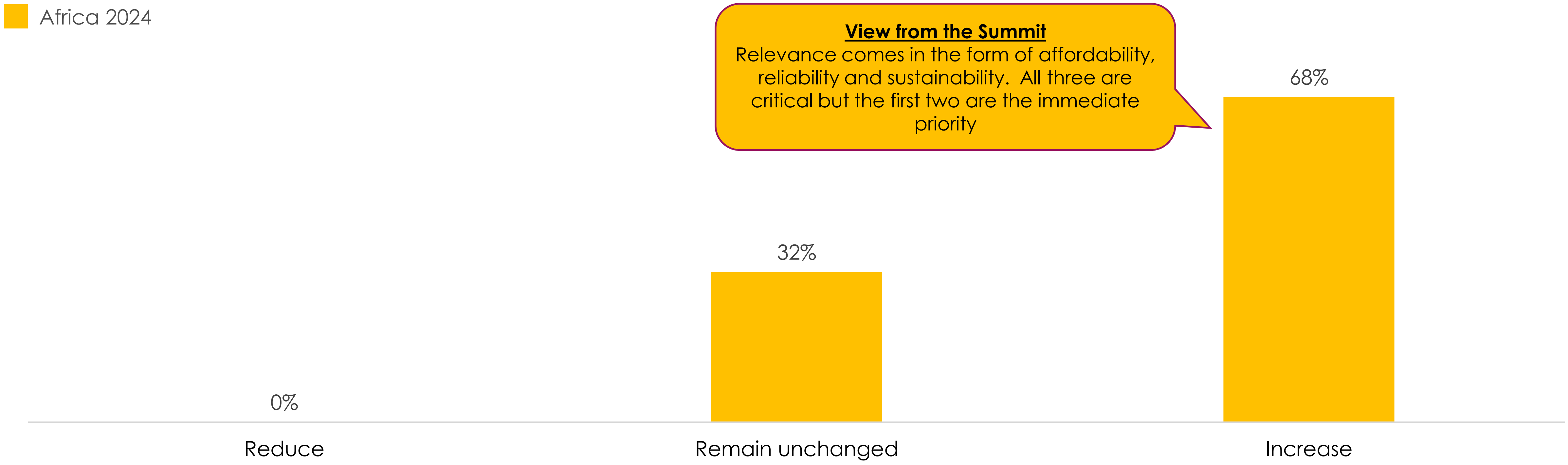
What are the key challenges facing mobile tower investors in Africa?
(score 1-5, with 1 = low, 5 = high)



Note: n (Africa, 2024) = 20; n(Africa,2023) = 23; May not add up to null responses provided

Unsurprisingly expectations are that power supply will increase or still be relevant

How will the relevance of power supply for digital infrastructure change over 2024-2025?

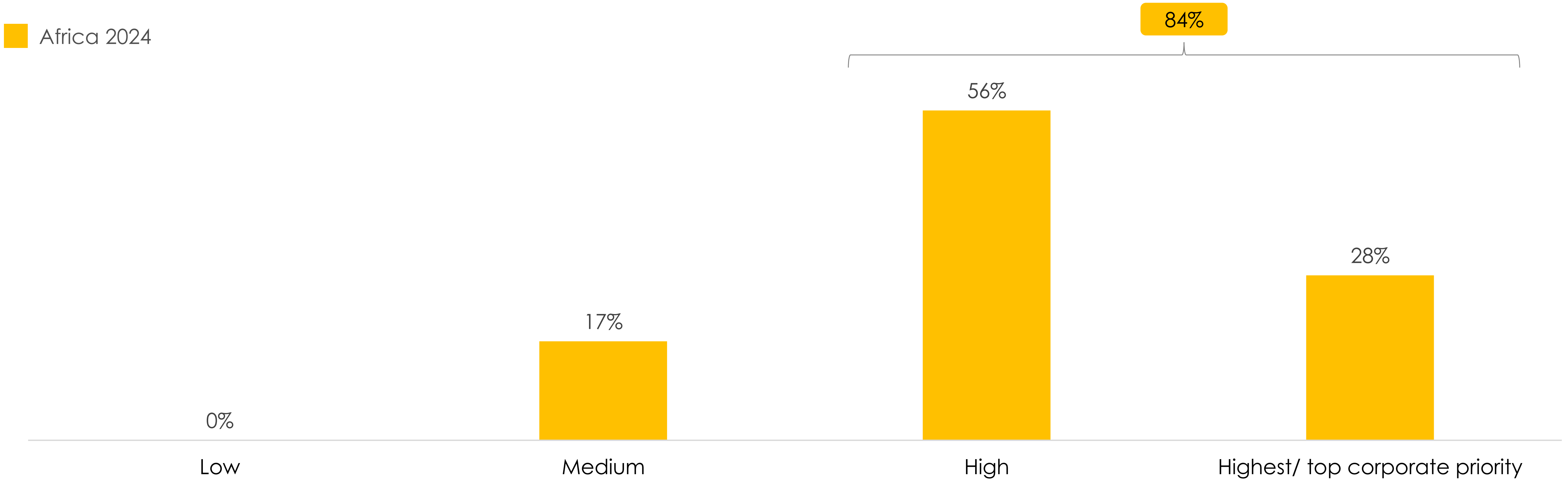


Note: n (Africa, 2024) = 20; May not add up to 100% due to rounding and/or null responses provided

Additionally, 84% of respondents reaffirm to have a big focus on improving energy efficiency

Digital Infra Leaders Summit

How big a focus does the company have on improving energy efficiency?



Note: n (Africa, 2024) = 20; May not add up to 100% due to rounding and/or null responses provided

85% of respondents believe adapting to a green energy supply is medium to high priority

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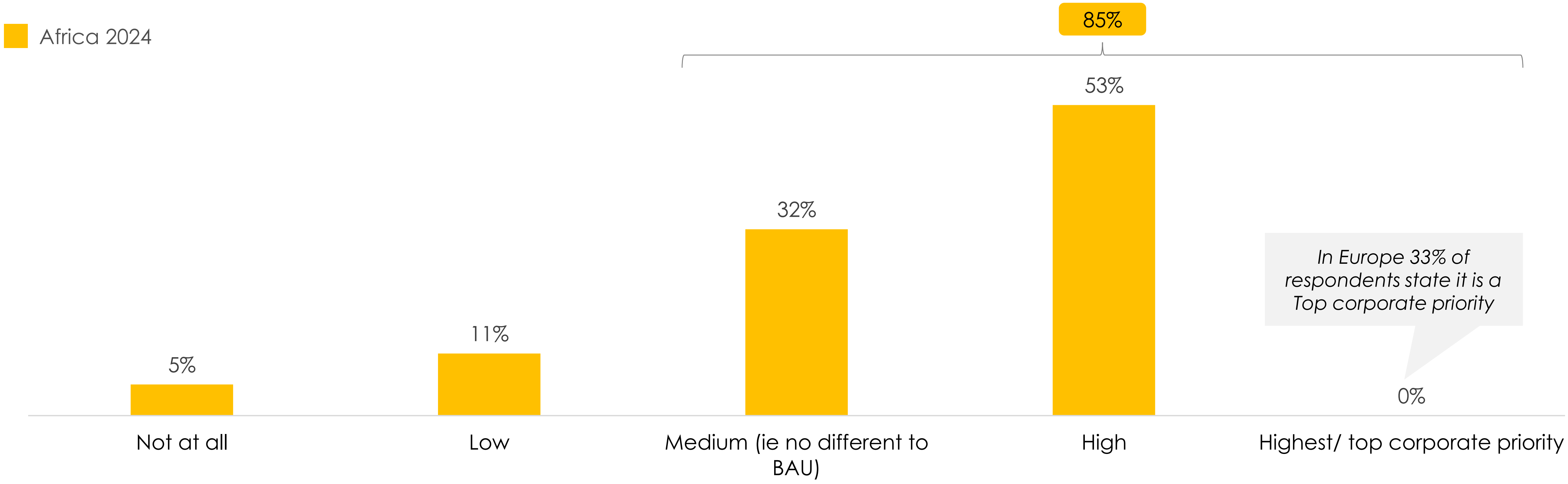
What is the current level of priority for adapting to a green energy supply?



Note: n (Africa, 2024) = 20. May not add up to 100% due to rounding and/or null responses provided

Less than 37% of you think that there is sufficient access to green energy for your business model

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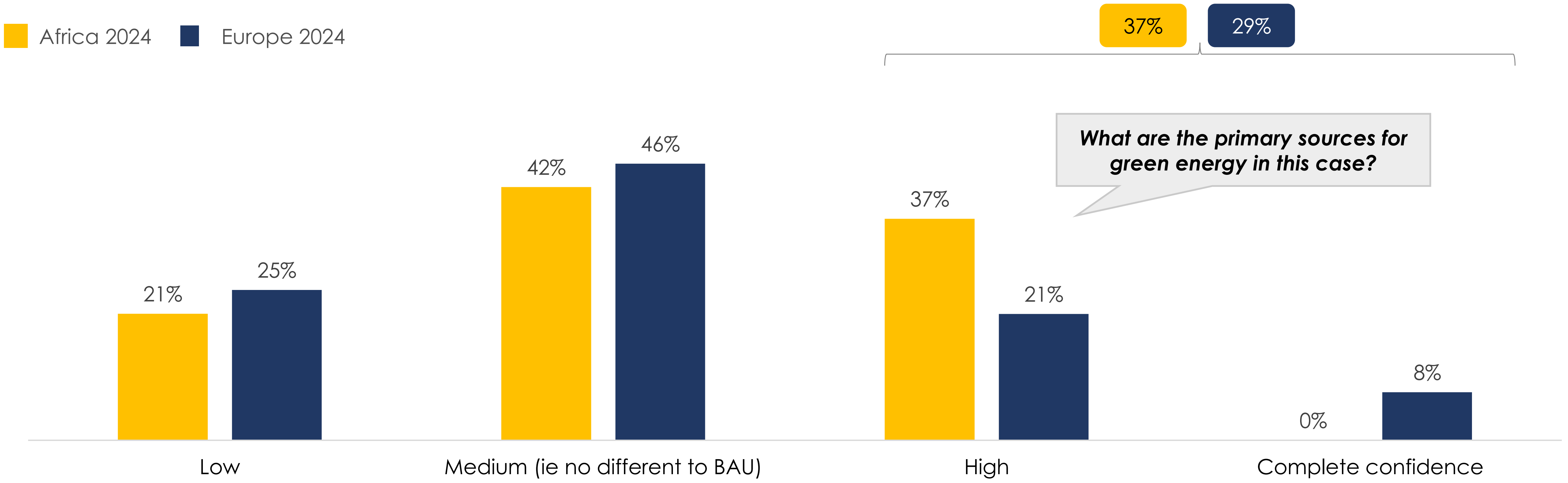
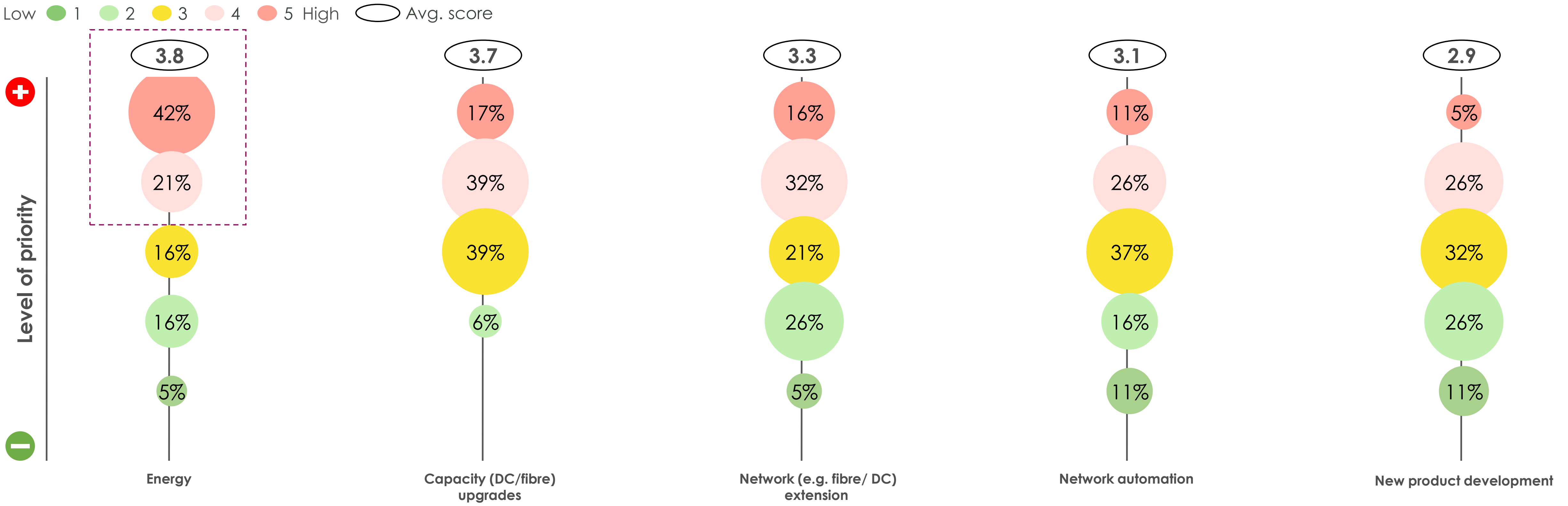
What level of confidence do you have today that you will be able to access sufficient green energy at affordable prices for your current business model?



Note: n (Africa, 2024) = 20. May not add up to 100% due to rounding and/or null responses provided

Energy is the highest priority for CAPEX allocation

What level of priority are the following areas receiving for CAPEX allocation
(score 1-5, with 1 being lowest priority and 5 being highest priority)



Note: n (Africa, 2024) = 20; May not add up to 100% due to rounding and/or null responses provided

Lobbying and working with utility partners are considered critical to avoid power becoming a limiting factor

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To avoid power becoming a limiting factor in your growth, what will be the most important strategies (score 1-5, with 1 = low and 5 - high)

Note: n (Africa, 2024) = 20; May not add up to 100% due to rounding and/or null responses provided

FTI DELTA

Deploying infrastructure and power supply management are the key priorities for Africa

Digital Infra Leaders Summit

Within the digital infrastructure sector, what is the top priority for the next 12 months to ensure continued growth?

Last year	This year
Exploitation of new opportunities in last mile and cloud services	Manage reliable cost-effective energy supply to meet the rising demand due to the infrastructure growth
Investment in infrastructure and network connectivity	Enhance resiliency and reduce reliance on subsea
Providing access to open, interoperable, reliable and secure Internet. Accessible and affordable for everyone!	DC capacity expansion, BTS towers rollout, and new market FTTH rollout
Continued investment by global players	Public-Private partnerships and regulatory reforms to expand digital infrastructure efficiently
Complete data centre builds to drive colocation growth	Development of terrestrial fibre and long-distance corridors
Understanding the regulatory environment per country	New build and back up power

Note: n (Africa, 2023) = 23; n (Africa, 2024) = 20; May not add up to 100% due to rounding and/or null responses provided

Expanding connectivity and data centers offers the greatest potential for future value creation

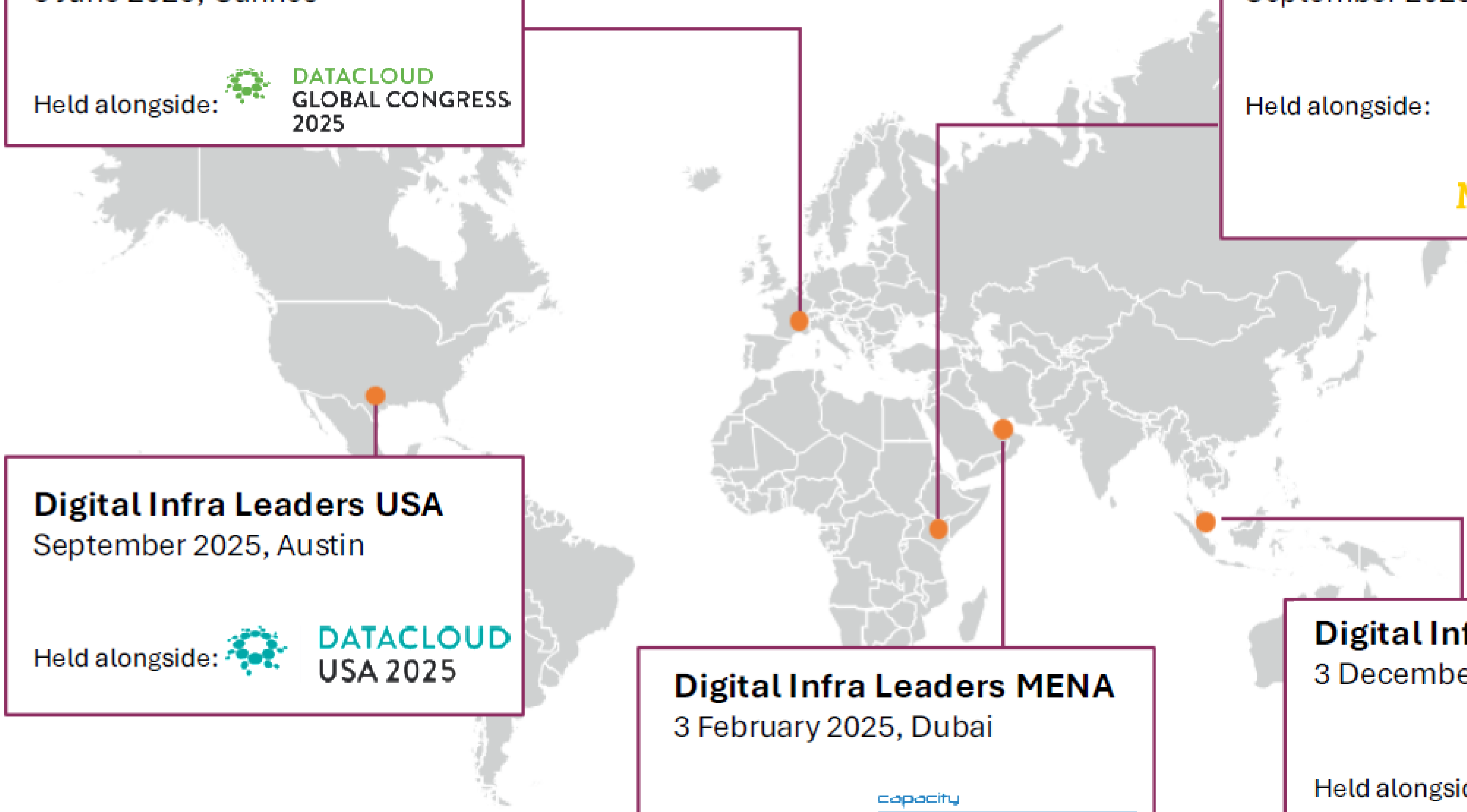
Digital Infra Leaders Summit

As an investor / operator in the digital infrastructure industry, where do you see the greatest potential for future value creation and how are you addressing these opportunities?

Last year	This year
Connectivity to DCs internationally and cross boarders	Expanding DC capacity and building Edge Data Centres
Edge computing and the infrastructure for 5G	Reliable terrestrial fibre build
Unserved and underserved sectors of society	Investing in Cybersecurity capabilities
Renewable power and evolution of the colo ecosytem	Leveraging AI advancements and leverage greatest renewable energy potential
Bundled infrastructure services (by type) and bundled with VAS	Metro fibre redundancy
Hybrid cloud and localization of data	Getting more commitments from Hyperscalers

Note: n (Africa, 2023) = 23; n (Africa, 2024) = 20; May not add up to 100% due to rounding and/or null responses provided

2024/25 calendar



Digital Infra Leaders Europe
3 June 2025, Cannes

Held alongside: DATACLOUD GLOBAL CONGRESS 2025

Digital Infra Leaders Africa
September 2025, Nairobi

Held alongside: itw Africa; TowerXchange Meetup Africa

Digital Infra Leaders USA
September 2025, Austin

Held alongside: DATACLOUD USA 2025

Digital Infra Leaders MENA
3 February 2025, Dubai

Held alongside: capacity MIDDLE EAST 2025

Digital Infra Leaders Asia
3 December 2025, Singapore

Held alongside: itw Asia

About the organisers

With deep and long- standing networks spanning the entire digital infrastructure community, the Digital Infra Leaders Summits are a collective effort of BroadGroup, Capacity Media, the Global Leaders Forum and TowerXchange,

capacity
a techoraco brand

Capacity Media is the premier and most trusted source of information and networking for those #KeepingTheWorldConnected, made up of the global connectivity and digital infrastructure communities.

Through our world-renowned series of large scale and regional events, awards, our print products such as Capacity Magazine, our daily digital news coverage, Capacity TV channel, and executive podcasts; Capacity Media is your authority on the latest developments shaping the industry of tomorrow.

Our eminent events portfolio includes International Telecoms Week (ITW), the Capacity series, Metro Connect and the Global Carrier Awards. Join us in our mission to connect people and communities across the global digital infrastructure industry.

https://www.capacitymedia.com/

DATACLOUD
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Datacloud exists to facilitate the growth of the global IT infrastructure ecosystem. From investment, to design, through to operation, our network reaches the full life cycle of the data centre, cloud, edge, finance, and big tech industries.

Through our slate of global events we provide thought-leadership directly from the most senior leaders in our space, and unique networking opportunities around the world.

We understand the importance of data infrastructure in modern society, and we believe in the power of connections

https://datacloudseries.com/

GLF community

The GLF is a membership organisation that provides a single voice to the broader digital ecosystem, ensuring alignment amongst international connectivity leaders for industry transformation. Our mission is to provide leadership to the industry that is #KeepingTheWorldConnected based on the principles of interoperability, connectivity, and value creation.

www.itwglf.com

itw
a techoraco brand

International Telecoms Week (ITW) is the world's largest annual meeting for the global connectivity community to meet, learn and conduct business. Uniting decision makers from across the telecoms and ICT Infrastructure ecosystem, this is a must-attend event for anyone who is enabling and pioneering the future of communication.
In 2023, we expanded our horizons and bringing you ITW Africa! The only event in Africa where you can meet the entire infrastructure value chain, including cloud, finance, satellite, and carrier providers.

www.internationalteleomsweek.com

Tower Xchange
a techoraco brand

TowerXchange is the market leader in telecom tower industry market intelligence. Our premium data sets and industry reports are trusted by towercos, MNOs, investors, equipment vendors and solution providers.

Our annual series of Meetups represent the most important date on the calendar for tower industry professionals and have been assembling CXOs and the who's who in digital infrastructure for over a decade

www.towerxchange.com