

AFRICA'S IMPERATIVE

Building **capability**, **sovereignty** and **scale** for the continent's next decade

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NASPERS

prosus

ABOUT THIS INSIGHT REPORT

A narrow,
consequential
window.

On 30 March 2026, a select group of senior leaders from technology, policy, infrastructure, investment and civil society convened to examine the trajectory of artificial intelligence in South Africa and across the African continent.

The engagement brought together corporate affairs and policy executives, government representatives, global technology partners, AI entrepreneurs and ecosystem builders — a closed-door dialogue designed to move beyond rhetoric towards practical insight.

The discussion was anchored in a shared premise: Africa has entered a narrow but consequential window in which its position in the global AI economy will be determined. While the continent's participation in AI is inevitable, its role is not.

This summary captures what was said, what was learned, and, most importantly, what must now be done.

*Africa does not
lack conviction
on AI. What is
required now
is coordinated
action.*

CONTENTS

In this report.

01	EXECUTIVE SUMMARY Africa's AI Imperative.	2
02	CONTEXT A continent at an inflection point.	3 - 4
03	THE ECOSYSTEM Infrastructure, data, talent, capital.	5 - 10
04	ADOPTION TO IMPACT Enterprise pace, societal reach.	11 -12
05	REGIONAL ANCHORS Champions across the continent.	13 - 15
06	WHAT MUST NOW BE DONE Priorities and call to action.	16 - 17
07	ACKNOWLEDGEMENTS With thanks to those who shaped the conversation.	18 - 19

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EXECUTIVE SUMMARY

Africa's AI imperative

Artificial intelligence is reshaping the architecture of global competitiveness. The window in which Africa can move from being a consumer of intelligence to a co-author of it is narrow, and it is closing. These themes were the focus of the Naspers-Prosus AI in Africa Convening in March 2026. It brought together leaders from corporate affairs, public policy, government, civil society and technology to assess where the continent stands and what it must do next.

The convening surfaced five structural priorities that frame the decade ahead: coordinated action across sectors that today operate in parallel, sovereign capability anchored in local talent and institutions, data sets that reflect African languages, contexts and lived realities, infrastructure and compute that can be relied upon at scale, and capital patient enough to build foundations rather than only fund pilots.

A central tension runs through every one of these priorities. Private investment flows where returns come quickest, while the applications that carry the greatest public benefit attract the least capital.

Closing that gap is not a question of goodwill. It requires deliberate alignment between private investment, public policy and philanthropic capital, and it requires the continent to lead with its own terms of engagement rather than wait for them to be set elsewhere.

The convening pointed to six immediate frames for action: shape the narrative, convene cross-sector coalitions, defend and grow access to compute and data, position responsible AI as a competitive advantage, invest in talent pipelines that begin at school level, and treat trust as the operating system on which everything else depends.

What Africa does in the next few years, together and on its own terms, will determine whether it spends the coming decade applying intelligence built elsewhere or building intelligence the rest of the world comes to rely on. That choice is still open, but it will not stay open for long without concerted action.

The central question is whether Africa will emerge as an architect of AI systems, or remain primarily a consumer of technologies developed elsewhere.

ACCELERATION OF AI INFRASTRUCTURE INVESTMENT ACROSS THE CONTINENT

Uganda's Aeonian Project: A hyperscale AI hub situated inside the Karuma hydropower plant on the Nile, designed to use renewable energy to power a sovereign supercomputer.

Cassava & Nvidia: Launched an AI factory in Cape Town as part of a multi-phase continental rollout targeting up to 15,000 GPUs, with Nigeria, Kenya, Egypt, and Morocco next in line.

Dell Technologies: Announced the launch of a dedicated AI factory in South Africa in 2024, expanding its generative AI services through 2025.

Altron Group: Launched South Africa's first operational AI Factory in October 2025 in partnership with Nvidia, providing AI infrastructure, tools, and training for local enterprises, including Dataviue and Lelapa AI.

FIVE STRUCTURAL PRIORITIES

What must change.

Five interrelated priorities emerged as critical to accelerating Africa's AI trajectory and securing its active participation in the global AI economy.

02

Strengthen infrastructure and compute capacity

— particularly through shared, regional models

Close gaps in data and representation

— especially in relation to African languages and contexts.

Improve coordination across sectors

— to translate intent into execution across policy, industry and civil society.

Advance sovereign capability

— including local control over data, infrastructure and model development.

Align capital with long-term ecosystem development

— with greater emphasis on patient capital and public-interest investment.

The opportunity is significant, but time-bound. The decisions taken in the near term will determine whether Africa participates in the AI economy on its own terms.



CONTEXT

A continent at an inflection point.

Africa stands at a defining moment in the evolution of the global artificial intelligence economy. The question is no longer whether AI will shape the continent's future, but whether Africa will participate in shaping AI in return. Despite its scale and growing digital adoption, Africa remains underrepresented across the core drivers of AI: infrastructure, investment, talent and computing. At the same time, the potential upside is considerable.

AI is increasingly being recognised as a catalyst for productivity, growth and inclusion, and as a capability that will influence competitiveness across nearly every sector. Momentum is building. Governments are advancing policy frameworks, capital is beginning to move, and a growing number of ecosystem actors are converging around the importance of AI.

Yet progress remains uneven. Across the system, ambition still exceeds execution.

The central challenge is therefore not intent. It is the ability to convert intent into momentum, and momentum into coordinated action at the scale the moment requires. That conversion will not happen on its own, and it will not happen quickly enough unless it is deliberately engineered.

03



SYSTEM

AI is an ecosystem, not a standalone technology.

A central insight from the engagement: AI cannot be treated as a discrete technology layer. It is the outcome of a broader digital ecosystem. Effective AI systems depend on the interaction between multiple components: connectivity, compute infrastructure, data availability, energy, skills, capital and governance.

Weakness in any one of these areas constrains progress across the whole system.

In the African context, these components are advancing, but often in isolation. Skills development is not always linked to employment pathways. Infrastructure investment is not consistently aligned with demand. Policy frameworks are emerging, but implementation remains uneven. The result is a landscape that is active, but not yet integrated.

BINDING CONSTRAINT

Infrastructure, energy, **computing.**

AI systems require significant processing power, supported by data centres, connectivity and reliable energy. Across much of the continent, this infrastructure base is still developing, which limits the ability to train, deploy and scale advanced AI systems locally.

The implication is that infrastructure cannot be treated as a downstream concern that the market will eventually resolve. Without deliberate investment in sovereign and regional compute capacity, the continent risks becoming a consumer of AI built elsewhere rather than a producer of AI built for, and from, African contexts.

Energy availability is a critical factor. The viability of AI-ready infrastructure is directly linked to stable and affordable electricity. Where energy capacity can be stabilised and expanded, some African markets could become competitive locations for data-centre development and AI processing.

Emerging infrastructure initiatives point to the direction of travel. The growing investment in AI infrastructure across Africa signals a shift towards shared, large-scale computing capacity, enabling broader access to advanced technologies and supporting innovation at scale.

Access to computing infrastructure remains one of the most immediate constraints on Africa's AI development.

SOVEREIGN CAPABILITY

Control, capability, connectivity.

Africa's current position in the AI ecosystem is shaped by a degree of external dependency. Many AI systems used on the continent are developed and trained elsewhere, often on datasets that do not reflect African realities. Data is frequently stored and processed outside the continent, weakening local control and limiting the extent to which value is retained within African economies.

The strategic response is not to retreat from global technology ecosystems, but to participate in them from a stronger position. That means building local capability and strengthening control while remaining globally connected.

At the model level, Lelapa AI offers a working example of what locally built systems can do. Their multilingual African language models perform on tasks that imported alternatives handle poorly or not at all, particularly across languages that are often overlooked.

At the infrastructure level, partnerships with global technology providers can accelerate access to advanced computing. Their long-term value, however, will depend on whether they help build enduring local capability or simply deepen structural dependency.

The countries that own their compute will own their choices.

DATA

Representation, sovereignty, trust.

Data is a foundational component of the AI ecosystem, yet it remains underdeveloped across several critical dimensions in Africa.



CHALLENGE 01 Representation

Existing datasets under-represent **African languages**, cultural contexts and economic realities, limiting the relevance of AI systems in multilingual and multicultural local environments. Companies like Lelapa AI show that building datasets which **reflect this diversity** is both feasible and necessary.



CHALLENGE 02 Sovereignty

Much of **Africa's data** is stored, processed and governed outside the continent, with consequences for control, value retention and long-term strategic autonomy. A continent that does not govern its own data cannot fully **shape its own AI future**.



CHALLENGE 03 Trust

In ecommerce and digital services, growth depends on the ability to **verify identities**, transactions and information flows. Trust infrastructure, including digital verification systems and the mechanisms that surround them, is therefore a precondition for the **wider adoption of AI-enabled services**.

ON ORAL KNOWLEDGE

A further complication lies in the nature of knowledge systems on the continent. In many contexts, valuable cultural and linguistic knowledge remains **oral rather than digitised**. Converting this into structured, machine-readable data is complex — but essential if AI systems are to reflect the societies in which they operate.



Africa has the youngest workforce in the world, but this alone is not a competitive advantage without the investment in AI talent.

TALENT

Strong supply, **constrained absorption.**

Africa's AI talent base is globally competitive, but locally constrained. Highly skilled professionals from the continent are increasingly integrated into international labour markets; reflecting both the quality of African talent and the limitations of domestic markets in absorbing it.

There is a structural gap within local ecosystems. While entry-level programmes are expanding and high-end talent exists, there are relatively few companies capable of employing, developing and retaining technical talent at scale.

Institutions such as WeThinkCode, Naspers Labs and collaborative platforms like Collective X demonstrate how industry-aligned training models can build job-ready talent.

The single largest determinant of whether African economies capture value in the AI era will be the speed at which the continent can produce talent at scale, and traditional approaches, on their own, will not deliver it



A shift in mindset: from near-term return to foundational long-term positioning.

CAPITAL

Patient capital, **long-horizon return.**

The development of AI systems, data infrastructure and compute capacity requires long-term investment. Much of the capital available within African markets, however, remains oriented towards shorter-term returns. This creates a fundamental misalignment.

Building AI capability often demands patient capital; particularly where the work involves infrastructure, multilingual datasets or public-interest use cases. These are not investments that produce immediate returns, yet they are vital for long-term competitiveness.

Addressing this will require more flexible financing approaches: patient capital, blended public-private models, and stronger corporate participation in ecosystem development.

04

ADOPTION TO IMPACT

From enterprise adoption to broader impact.

✓ Where AI is moving fast

Commercial enterprise, efficiency, automation, customer engagement and decision support.

These are driving rapid adoption, with clear incentives and visible returns.

✓ Where AI must also move

The wider economy, with a focus on small and medium businesses.

Closing this gap will require deliberate attention and what some have called a “just AI transition.”

AI adoption across Africa is currently being led by enterprise use cases. Applications focused on efficiency, automation and revenue generation are advancing within corporate environments because they align with clear commercial incentives.

Yet one of the clearest insights from the engagement was the distinction between AI for corporate Africa and AI for developmental Africa. The former is moving faster because the incentives are clearer and the demand is more immediate. The latter remains thinner, despite the scale of need.

In healthcare, AI-enabled diagnostics and telemedicine models are being used to extend access to primary care. In digital commerce, AI is improving product discovery, supporting small businesses and strengthening trust in online transactions.

The relevance of AI in Africa will ultimately be judged not only by enterprise uptake, but by whether it solves **concrete problems in the broader society and economy.**



GOVERNMENT

Enabler, coordinator, creator of demand.

Government plays a central role in shaping the AI ecosystem but that role extends beyond regulation. There is a growing shift towards viewing the state as an enabler of innovation, a coordinator of ecosystem activity and a creator of demand.

State procurement of digital services matters because it can generate markets for locally relevant applications, especially where commercial demand is not yet strong enough to drive scale.

05

REGIONAL ANCHORS

The power of regional scale.

There is a strong perception that the continent's AI trajectory will be shaped by regional champions, each anchoring development in its own part of Africa.

South Africa is one such anchor in Southern Africa. Kenya plays a comparable role in East Africa, Nigeria in West Africa, Egypt in the North Africa, and a number of other African countries are demonstrating policy leadership across the continent, like Rwanda and Uganda.

The continental opportunity lies in how these anchors connect, not in any one of them serving as a gateway to the others.

The continent's long-term position will depend not only on the starting advantages of its regional champions, but on how it effectively addresses the binding constraints of infrastructure, capital and skills.



The real opportunity lies not in individual markets, but in a continent-wide AI ecosystem built on collaboration, capability and scale.

RECOMMENDATIONS FOR SENIOR LEADERS

Strategic engagement & advocacy.

Six practical frames across engagement, operations, and trust to translate the agenda into concrete leadership behaviours.



01

Policy & Regulatory Leadership

- Engage proactively in national AI policy consultations and public forums
- Advocate for enabling regulatory frameworks rather than restrictive approaches
- Support coordinated continental approaches to AI governance and data sovereignty
- Build relationships with government officials leading digital transformation
- Communicate the economic and social benefits of AI adoption to policymakers



02

Stakeholder Coalition Building

- Participate in cross-sector AI ecosystem forums and working groups
- Create bridges between international technology providers and local implementers
- Support and working groups associations and think tanks on AI policy recommendations
- Foster regular dialogue between private sector, government, and civil society
- Champion collaborative rather than competitive ecosystem development



03

Local Partnership & Investment Strategy

- Develop corporate equity-equivalent programmes to invest in local AI startups
- Create vendor-local partner co-development models for African contexts
- Support African language AI development through funding and data partnerships
- Establish procurement pathways that prioritise local AI solution providers
- Use social impact programmes to fund skills development and community programmes

Capability, trust & impact.

Building shared capability, earning trust through responsible practice, and anchoring AI in community outcomes.



04

Infrastructure & Capability Building

- Support shared infrastructure initiatives like AI factories and regional data centres
- Invest in local skills development through training centres and educational partnerships
- Create internship and graduate programmes to retain African AI talent locally
- Develop supplier diversity programmes that include African AI solution providers
- Support renewable energy initiatives that enable competitive AI infrastructure



05

Responsible AI & Transparency

- Champion data sovereignty principles while maintaining global technology access
- Implement transparent AI governance and ethical AI principles
- Communicate workforce augmentation rather than replacement narratives
- Support research on bias reduction and cultural relevance in AI systems
- Engage in public discourse about AI benefits and risk mitigation



06

Community Engagement & Social Impact

- Showcase practical AI applications solving African development challenges
- Support multilingual AI initiatives that increase digital inclusion
- Fund social impact platforms and community-focused AI applications
- Partner with NGOs and development organisations on AI for development
- Communicate success stories of AI improving lives and economic opportunities

06

COLLECTIVE TAKEAWAYS

Four messages to carry forward.

CALL TO ACTION

The central challenge.

Across infrastructure, data, talent, capital and policy, one constraint appears repeatedly: **fragmentation**. There is no shortage of activity, nor of ambition. The problem is that too much of the ecosystem remains disconnected.

What is required is structured working groups, stronger public-private partnerships, regional cooperation, and ongoing platforms for collaboration and accountability.



01

Africa's AI opportunity will be won through execution, not ambition

The continent does not lack vision, talent or strategy. What remains scarce is the coordinated execution required to translate intent into infrastructure, products and policy. The next decade will be defined by those who move from roadmaps to deployment in complex, real-world African contexts.



02

Platforms will be the primary engines of AI adoption

Consumer platforms — in ecommerce, logistics, financial services and media — are where most Africans will encounter AI in their daily lives. These platforms already carry the user bases, data flows and behavioural signals on which AI systems depend, making them the clearest route to adoption at scale.



03

Building AI in Africa requires long-term, aligned capital

AI infrastructure, foundational datasets and locally relevant models are long-horizon investments. Short-term capital cycles will not produce the systems Africa needs. Patient, aligned capital — public, private and blended — must become the norm rather than the exception.



04

AI must be locally relevant and globally connected

Africa's AI future will not be built in isolation, nor should it be imported wholesale. The continent's position will depend on its ability to operate at the intersection of international technology ecosystems and African market realities: competitive globally, meaningful locally.

07

ACKNOWLEDGEMENTS

With thanks to those who shaped the conversation.

This report is the product of a closed-door gathering that brought together senior leaders from corporate affairs, public policy, technology, policy, infrastructure, investment and civil society to examine the trajectory of artificial intelligence across the African continent.

It would not have been possible without the candour, expertise and generosity of the participants: across technology, policy, government, investment and civil society, who all gave their time to examine the trajectory of AI on the continent and what must now be done to shape it. The perspectives gathered here reflect a collective view, not any single institution.

Our thanks go to each participant for speaking plainly, listening carefully, and helping translate ambition into a shared agenda for action.

CONVERSATION ANCHORS



Pelonomi Moiloa

CEO and Co-founder,
Lelapa AI



Claudio Fassiotti

EMEA Enterprise Regional
Business Lead, NVIDIA



Laura Fitoussi

Director of Strategy & Operations,
Naspers-Prosus



Ziaad Suleman

CEO, South Africa & Botswana,
Cassava Technologies

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PARTICIPATING IN THE CONVERSATION

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Alastair Tempest – CEO, Ecommerce Forum of South Africa

Anthony Williams – CEO, Phila Wealth Pty Ltd

Busisiwe Khaba – Regional Head of Public Policy - Africa, Middle East & Turkey, Amazon Web Services

Charmaine Houvet – Senior Director for Africa, Cisco Systems

Dumisani Sondlo – AI Policy & Governance Lead, South African Department of Communications and Digital Technologies (DCDT)

Fikile Nzuza-Chunga – Senior Public Policy Manager, Bolt Services ZA

Frederik Zietsman – CEO, Takealot Group

Gwen Ngwenya – Vice President, Public Policy, Southern Africa Mastercard

Juanita Clark – Chief Executive, Digital Council Africa

Julius Sikhuzza – CEO & New Ventures Executive, aYo SA (MTN & Sanlam)

Khule Duma – Portfolio and Partnerships Lead of South Africa's Digital Transformation Programme, The Presidency, Republic of South Africa

Machete (Eddie) Rakabe – Senior Researcher, Mistra

Mpho Lethoko McNamee – Group Chief of Corporate Affairs, Telkom

Mzamo Masito – Co-founder, NudgeLab Africa and Board Chair of South African Tourism

Nyari Samushonga – Executive Director, WeThinkCode

Siya Madyibi – Executive Director: Corporate, External and Legal Affairs, South Africa Microsoft

Thabo Makenete – Head of Public Policy: Southern Africa, Meta

Tshepo Marumule – Group Head of External Affairs, Takealot Group

Weyinmi Aghadiuno – Head of Regulatory & Policy Africa, Bolt

PROJECT SPONSORS

Nicola McGowan – Chief Communications Officer, Prosus Group

Shamiela Letsoalo – Director of Corporate Affairs, Naspers and Chairperson of the Ecommerce Forum South Africa

PROJECT TEAM

Palesa Molautsi – Communications Intern, Naspers

Zukiswa Nomnganga – Communications Manager, Naspers

Sbu Tshabalala – Head of Communications, Naspers



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