Google in Africa

Partner or predator?

Data Landscapers – May 2026

An open-source intelligence project

Report compiled with the assistance of Perplexity Computer and Claude Opus 4.7 from publicly available sources and prior research notes and datasets.

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1. Executive summary

The pledge

In February 2022, at the African Union Summit business forum, Google CEO Sundar Pichai committed US$1 billion over five years to "accelerate Africa's digital transformation". The money was promised across four pillars: affordable internet access, support for startups and SMEs, digitisation for enterprises and governments, and nonprofit support. By September 2025, Google's Senior VP James Manyika told Bloomberg the company had "exceeded the $1 billion mark".

The headline obscures more than it reveals. Google has never published an audited breakdown of how the pledge was allocated across pillars, years or countries. The same large figures recur in different combinations across Google blog posts without reconciliation. Smaller commitments are announced more than once.

More strikingly, the assets documented in this report — two undersea cables, extensive overland cabling, the Johannesburg cloud region, four planned hubs — represent capital expenditure that, on industry-norm benchmarks, runs to several billion dollars in its own right. None of it is visibly contained within the pledge envelope. The defensible reading is that Google's actual African commitment over 2022–2026 is materially larger than US$1 billion, quite possibly multiples of it. The absence of disclosure makes the true number unknowable from outside. The recycled headline figure is doing communications work, not financial-disclosure work.

The first mile

Subsea cables are the pipes that carry the internet into Africa. Google now operates two of them. Equiano, named for the 18th-century abolitionist Olaudah Equiano, has been operational since 2022 with landings in Togo, Nigeria, Namibia, St Helena and South Africa; Google's own commissioned impact assessments project around 21% lower retail internet prices and faster speeds in landing countries. Umoja, announced in 2024 and targeting completion in 2027, will be the first fibre route directly connecting Africa to Australia. In September 2025 Google announced four further infrastructure hubs — north, south, east and west — each combining cable landing stations with adjacent data-centre capacity.

Once those hubs are operational, Google together with Meta will account for an estimated 65–75% of new high-capacity subsea capacity being built into the continent. That is a level of single-hyperscaler concentration without precedent in African connectivity infrastructure.

It is also a snapshot, not a permanent state. SEACOM 2.0 — financed entirely by African and Aga Khan institutional shareholders, with no hyperscaler or development-bank equity — is targeted for service in 2029–2030, with design capacity larger than every hyperscaler cable to Africa combined.

Data centres and where the data ends up

An African government, bank, hospital or university choosing Google Cloud today is choosing one of two destinations for its data: a single building in Johannesburg, or somewhere abroad. There is no second Google Cloud region on the continent. Customers who want to keep data in-country in Lagos, Nairobi or Cape Town can do so — but only by stepping outside Google Cloud and running their own infrastructure in third-party colocation facilities, which gives up the managed-service layer that is the reason most customers choose Google Cloud in the first place.

Google's African cloud capacity sits in one full region in Johannesburg, operational since January 2024. No second region elsewhere on the continent has been announced. The four planned interconnect sites in Cape Town, Lagos, Nairobi and Johannesburg are doorways into Google's global network, not local processing facilities. Any workload that runs through them ends up either in Johannesburg or, more often, in one of Google's regions in Europe or the United States.

The Johannesburg region itself sits inside a Teraco campus. Google is the tenant, not the owner. Teraco is a subsidiary of Digital Realty, a US-listed real-estate investment trust. The building through which essentially all African Google Cloud traffic flows is therefore, in legal terms, US-headquartered and exposed under the CLOUD Act — the US law that lets American authorities compel US-headquartered firms to hand over data held anywhere in the world.

"Sovereign AI" and "digital agency" are the words Google and its African partners use to describe this arrangement. The harder question, which the public-policy documents do not address, is what sovereignty means when there is one African building where the data can sit and a US-controlled landlord operating it.

Gemini lock-in

Beneath the headline US$1 billion infrastructure pledge sits a less-discussed second pledge: the free distribution of Gemini.

Across at least six named programmes — the 12-month AI Pro Plan announced for students in eight African countries, the Gemini for Education tier free to every signed-up institution, the training of 25,000 Nigerian educators, the Kenyan Cabinet-launched university rollout, the AfCFTA ADIEP programme delivered through the Google Hustle Academy, and Google's continental commitment to train three million Africans in digital and AI skills — Google has committed an estimated five to seven million Gemini-access seats for African distribution between 2025 and 2030. The notional retail value, at the AI Pro tier, is approximately US$1.0 to 1.6 billion.

This is not a generic AI subsidy. Gemini's free distribution runs only through Google's own surfaces. Those surfaces are served from Google Cloud regions. Gemini training runs on Google-owned AI chips inside Google data centres. In Africa those data centres are reached through Google-owned subsea cables and Google-anchor-tenant interconnection campuses.

The whole vertical stack — cable, data centre, model, app — is the product. The free Gemini is how Google fills it with users. The two are sized to fill each other.

Cassava: anchor of sovereignty, or anchor tenant?

Strive Masiyiwa has been among the most articulate champions of African scientific and digital sovereignty — through Econet, Liquid Intelligent Technologies, the Pan-African e-Network, his service on the African Union's Smart Africa board, and his current chairmanship of the African Union's Africa AI Council. Cassava Technologies — the company that now houses Liquid's continental fibre, data-centre and cloud business — is the closest thing Africa has to a sovereign hyperscaler-scale infrastructure platform.

The single question that defines Cassava Technologies' new position is whether it remains an anchor of African digital sovereignty, or has become an anchor tenant of Google's African expansion.

The 2025 Cassava–Google partnership places that platform inside Google's commercial estate. Cassava operates Africa's first NVIDIA AI factory, hosts a sovereign-cloud overlay, and acts as Google's preferred distribution partner for Gemini-based enterprise services across the continent. The arrangement is commercially defensible: Cassava gains scale, capital efficiency and product access it could not assemble independently in the available window; Google gains a credible African front-of-house for a continent-wide cloud and AI offer.

The harder question is structural. Cassava's revenue, technology stack and customer pitch are now materially dependent on Google's roadmap, pricing and licensing terms. Liquid's fibre carries Google traffic into Cassava data centres that host Google services running on Google-licensed chips. The independence position from which Masiyiwa has historically argued for African sovereignty is, at minimum, harder to occupy from inside that stack.

MoUs

Alongside the commercial infrastructure sits an institutional one. Google has signed framework Memoranda of Understanding with each of the four bodies that matter for continental digital policy:

- the African Union Commission (February 2026, "AI for Government", routed through the Infrastructure portfolio);
- the UN Economic Commission for Africa (February 2024, with a flagship Regional Data Commons launched November 2025);
- the AfCFTA Secretariat (delivered through the November 2025 ADIEP programme to train 7,500 SMEs in cross-border digital trade across nineteen countries);
- Smart Africa, where Google holds platinum membership.

None of these MoUs carries a published dollar value, governance mechanism or exit clause. All of them give Google a seat in the rooms where African AI and digital-trade rules are being written.

This is the visible half of what is best understood as a deliberate two-track operating model. One track builds the cables, the cloud region, and the enterprise customer base. The other runs the MoUs, the AU and ECA work, the commissioned policy blueprints, the educator partnerships, and the platinum memberships.

The two tracks reinforce each other. A free training programme delivered through an AU-endorsed MoU builds the user base for the commercial cloud. Commercial infrastructure investment builds the credibility that secures the next MoU. Each individual deal performs double duty. Each track de-risks the other. The institutional presence is not a marketing veneer over the commercial estate. It is structurally fused with it — and that is the design, not an accident.

AfCFTA at stake

The African Continental Free Trade Area is the most ambitious economic instrument in Africa's post-colonial history. Its Digital Trade Protocol is the rulebook for an eventual 1.4 billion-person market. It will determine how much control African states retain over data about their citizens, and whether African regulators will ever have the right to inspect the AI systems that foreign firms deploy on the continent.

The Protocol's Articles 20, 22 and 24 closely mirror long-standing US negotiating positions on digital trade. The external technical-assistance ecosystem that ran in parallel with its drafting included Google-adjacent actors.

The Protocol does not sit in isolation. It sits inside a continental policy architecture built around three earlier AU instruments — the Data Policy Framework, the Continental AI Strategy, and the Digital Transformation Strategy for Africa 2020–2030. The central commitments of all three are data sovereignty, African ownership of digital public infrastructure, and the capacity to set continental rules without external capture.

The question this report raises, but does not claim to resolve, is whether the operating model documented in the MoUs above, the commissioned policy blueprints, and the financing architecture they assume is compatible with those commitments. Or whether AfCFTA implementation is being shaped, at the rulebook layer, by the very actor that stands to benefit most from the rules.

On the available evidence the alignment question is open. It is also, given AfCFTA's significance, the most consequential question in this report.

Transparency

Across the workstreams documented here, transparency is the recurring weak link:

- Google's US$1 billion 2022 pledge has never been broken down by country, year or workstream.
- The four MoUs with the African Union Commission, ECA, AfCFTA Secretariat and Smart Africa are unpublished — no disclosed text, deliverables, budgets or review mechanisms.
- The authorship of and external technical inputs to the AfCFTA Digital Trade Protocol, whose Articles 20, 22 and 24 closely mirror long-standing US negotiating positions, are not on the public record.
- Cohort sizes and outcomes for the flagship skilling programmes are reported selectively.
- The ultimate destination of African user and enterprise data — Johannesburg, or onward to Google regions outside the continent — is not disclosed to end users, or in any granular form to host-country regulators.

Taken together, the public record is sufficient to map Google's footprint in Africa. It is not sufficient to audit it.

Partner or predator?

Google's investments in Africa are not philanthropy. They are commercially rational.

The pattern across cables, cloud, free AI tools, equity stakes, institutional MoUs and policy advocacy is what the cloud industry itself calls a "land and expand" strategy. Free tools and cables build user habits; user habits build enterprise lock-in; enterprise lock-in justifies more infrastructure; more infrastructure deepens dependency.

The strategy is legal and well-executed, even where its individual components are only partially transparent. Its aggregate effect is to make African states structurally dependent on Google for the digital plumbing of their economies.

And the very legal frameworks that would constrain that dependency — data sovereignty laws, source-code review rights, digital services taxes — are simultaneously being lobbied against by the same Google executives who sign the partnership MoUs.

2. Google's stated strategy

2.1. The headline pledge

In February 2022, on the sidelines of the African Union Summit business forum, Google CEO Sundar Pichai stood up and committed US$1 billion over five years to "accelerate Africa's digital transformation". The pledge was framed around four pillars: affordable internet access, support for African startups and SMEs, help for enterprises and governments to digitise, and nonprofit support (Google Blog, *How companies can help accelerate Africa's digital transformation*). Three and a half years later, in September 2025, Google's Senior Vice President for Research, Technology & Society James Manyika told Bloomberg the company had "exceeded the $1 billion mark" (Bloomberg, 18 Sep 2025; Developing Telecoms). That sentence — delivered in passing, with no audited breakdown — remains the only public confirmation that the 2022 pledge has been delivered.

The pledge is the headline. What Google has actually been doing, in the years between the Pichai announcement and the Manyika confirmation, is considerably more interesting.

Three things are worth noticing before the detailed accounting in §3 begins.

The first is that Google's African footprint has grown around a tighter and more strategically coherent set of pillars than the 2022 statement suggested. By the time of the July 2025 "AI Community Center" announcement in Accra, the November 2025 ECA partnership renewal, and the February 2026 "Africa's AI Opportunity" blog timed to the AU Summit, the four pillars had crystallised:

Pillar	What Google says	Anchor initiatives
Infrastructure	"Vital connectivity across the continent"	Equiano, Umoja, four subsea hubs, Johannesburg region, interconnect sites in JNB / CPT / LAG / NBO
AI talent & skills	Train 3 million students and teachers by 2030 (on top of the 7M+ already trained)	Grow with Google, Hustle Academy, Africa Developer Ecosystem, Nigeria AI Academy, free Gemini for university students in six countries
AI research & products for Africa	Build "AI for Africa, by Africa"	Google Research Africa (Accra, Nairobi), AI Community Center Accra, WAXAL, Open Buildings, Flood Hub, MedGemma
Policy & DPI partnerships	Help build "sovereign" digital public infrastructure	AUC MoU (Feb 2026), ECA MoU (Feb 2024, renewed Nov 2025), AfCFTA ADIEP, World Bank–Google DPI alliance, Smart Africa engagements

Sources: Google Blog, *Supporting the future of AI Research in Africa and globally* (Jul 2025); ECA, *ECA and Google deepen strategic collaboration* (Nov 2025); Google Blog, *Africa's AI Opportunity* (Feb 2026).

The second is that the language has shifted, and the shift is not incidental. The 2021–2023 vocabulary was about closing the digital divide and reaching the "next billion users" — the language of a frontier market and a connectivity gap. The 2025–2026 vocabulary, set by Manyika, by Africa MD Alex Okosi, and by Pan-African Institutions head Pren-Tsilya Boa-Guehé, talks about "sovereign AI", "digital agency", and "Africa as innovator, not bystander" (AU/Google press release, Feb 2026; LinkedIn — Pren-Tsilya Boa-Guehé, Dec 2025). Africa has moved, in Google's telling, from a place that needs connecting to a place with agency that needs partnering with. The change of register is doing two jobs simultaneously: it tracks a genuine evolution in the company's African product offer (a live cloud region, a commissioned AI factory, an investible startup base) and it positions Google as the natural commercial partner for the AU's own "sovereign AI" agenda.

The third is that this rhetorical pivot coincides with two commercial realities the rhetoric does not name. The Johannesburg cloud region went live in January 2024 and now needs enterprise customers paying for capacity (TechCrunch, Jan 2024). And Gemini is competing globally with OpenAI, Anthropic and the leading Chinese frontier models — a race in which seeding 1.4 billion Africans on Google AI tools, free at the point of use, is strategically valuable well beyond Africa itself (Semafor, Jul 2025). The "sovereign AI" rhetoric is therefore landing at the exact moment when Google needs African demand to fill African infrastructure and African users to keep Gemini competitive globally. That alignment is the subject of the rest of this report.

2.2. Two tracks: commercial and public policy in tandem

Google's African engagement is best understood not as one strategy but as two — running in parallel, through the same organisation, and designed to reinforce each other at every joint. Most external observers see only one of the tracks and conclude either that Google is "just another cloud vendor expanding into a frontier market" or that Google is "an influence actor lobbying African policy frameworks". Both readings are right about their half of the picture and miss the point of the design, which is that the two halves are not separate.

The **commercial track** is what Google Cloud EMEA, the Africa MD's office, and the Sales and Partnerships organisations do. Its goal is a profitable, defensible AI and cloud business on the continent, with Gemini and Google Cloud at its centre. Its customers are telcos, banks, retailers, governments-as-buyers, independent software vendors, SMEs and consumers. Its instruments are the cloud region in Johannesburg, the Equiano and Umoja subsea cables and the four announced hubs, the Cassava Sovereign Cloud partnership, Google Workspace, Vertex AI, paid Gemini Enterprise, the Black Founders Fund, and the accelerator programmes. Its visible deliverables are

`africa-south1`, the Equiano landings, the Cassava arrangement, and the 12,000 GPUs that come with it. The lead figures on this track are Alex Okosi as Managing Director for Africa, Niral Patel as Director of Google Cloud Africa, and Kabelo Makwane as South Africa Country Director. The funding is capital and operating expenditure from the Alphabet balance sheet, with conventional commercial returns expected.

The **public-policy track** is what Government Affairs and Public Policy (GAPP), Google.org, the Pan-African Institutions team, and the AI Policy team do. Its goal is to shape the regulatory, standards, data-governance, trade and procurement environment in which the commercial business has to operate, so that scaling that business encounters as little friction as possible. Its counterparties are the African Union Commission, the UN Economic Commission for Africa, the AfCFTA Secretariat, the Smart Africa Alliance, NEPAD, line ministries, regulators, multilateral lenders and standard-setting bodies. Its instruments are MoUs, programmatic partnerships such as AfCFTA ADIEP, Smart Africa platinum membership, the Wilton Park dialogues, Google.org grants, and free Gemini access for governments and students. Its visible deliverables are the AUC MoU of February 2026, the ECA Regional Data Commons, the AfCFTA ADIEP SME programme, the Smart Africa flagships, and AI-readiness training for public officials. The lead figures here are Charles Murito as Regional Director of GAPP for Sub-Saharan Africa, Pren-Tsilya Boa-Guehé as Lead for Pan-African Institutions and AI Policy, and Doron Avni as Vice President for Emerging Markets Public Policy. The funding character is philanthropic or in-kind, with no direct return expected — but with substantial indirect commercial benefit.

2.2.1. How the two tracks reinforce each other

The tracks are not parallel businesses. They are designed to feed each other, and they meet at three specific junctions.

The first is **infrastructure before rules**. The commercial track lays physical capacity into the ground — cables, cloud region, fibre via Cassava — and that physical capacity then becomes the factual baseline the public-policy track invokes when continental rules are being drafted. Once Equiano has landed in five African states, arguments for hyperscaler-friendly cross-border data-flow provisions under the AfCFTA Digital Trade Protocol become materially easier to make: the cost of data localisation is now visibly higher, because the alternative pipe already exists. The commercial track creates the facts on the ground. The policy track translates those facts into the rulebook.

The second is **free at the top, paid at the bottom**. Free Gemini Pro and NotebookLM for 3 million students and teachers by 2030, free AI-readiness training for public officials, free Google Workspace for universities — all of these sit on the public-policy track, and none of them generates direct revenue. What they generate is skills lock-in. The graduate trained on Gemini and Workspace, the civil servant trained on Vertex AI, the lecturer trained on Google's AI for Education tools — these are the people who, when they enter procurement decisions on the commercial side,

default to the stack they know. This is the explicit thesis in the companion note on free AI driving cloud buy-in.

The third is **MoUs as procurement scaffolding**. A formal Memorandum of Understanding with the AUC, the ECA or a member-state ministry does not by itself oblige anyone to procure a Google service. But it routinises the convening, gives Google trusted-partner status in continental working groups, places Google personnel inside the rooms where technical standards are drafted, and reduces the political cost to officials of subsequently selecting Google Cloud or Gemini in a tender. The February 2026 AUC MoU explicitly covers "policy, governance, and responsible AI frameworks" — which is to say, exactly the rule-making layer that determines whether Vertex AI or a sovereign alternative is procured downstream.

2.2.2. Why this matters for sovereignty analysis

Three consequences follow from taking the two-track design seriously.

The first is that critiques aimed at only one track miss the mechanism entirely. Calling Google "just another cloud vendor" understates the policy footprint that makes the cloud business expandable. Calling Google "an influence actor" understates the infrastructure that gives the influence its credibility. The leverage comes from combining the two — which is why critiques that hit only one half almost never land.

The second is that the rhetorical pivot to "sovereign AI" is itself a two-track manoeuvre. Commercially, "sovereign" justifies premium-priced Cassava-hosted regions and dedicated GPU clusters. Politically, it pre-empts the genuinely sovereignty-aligned alternatives — the RealTyme/CERTA-style partnerships that Smart Africa is exploring with non-hyperscaler vendors — by occupying the word. The same vocabulary does both jobs.

The third is the practical one. For African counterparties — the AUC, the AfCFTA Secretariat, Smart Africa, member-state ministries — the policy lever is to separate the tracks. Google's commercial offers can be accepted on commercial terms; its standards work can be engaged on standards terms; its training programmes can be used without committing to its products. But this is only possible if the tracks are recognised as distinguishable in the first place. Where they are treated as one indivisible "partnership", as the framing of every MoU encourages, African leverage collapses. That collapse is not accidental. It is what the two-track design is for.

2.3. Who pays for Africa's digital infrastructure?

One of the most analytically important features of Google's African strategy never appears as an explicit claim in any of Google's own materials. It surfaces only when one reads, side by side, the three policy documents that Google has commissioned or co-funded to articulate the strategic case

for AI in Africa: the Wilton Park *Successfully Harnessing AI in Africa* report (January 2025) (convened by Wilton Park, co-funded by the UK FCDO and Google, authored by Kati Suominen of Nextrade Group), the Nextrade Group *AI Policy Blueprint for Africa* (commissioned by Google), and the Nextrade Group *AI Skilling Blueprint for Africa* (commissioned by Google). All three are written by the same author for substantially the same client and circulate in the same policy fora. (See also Suominen's involvement with AfCFTA in §3.5.1)

The three documents are framed around a shared four-pillar architecture — infrastructure, skills (or "people"), innovation, and policy. On the surface they read as balanced multi-stakeholder strategy. Read in aggregate, however, they share a single unstated premise: **that African states cannot finance the underlying digital infrastructure themselves, and that someone else has to do it for them.**

Across the three documents, the prescribed financing arrangement for Africa's digital and AI infrastructure has three corners:

1. **African governments** are urged to "urgently prioritize investments in digital infrastructure, including cloud services, data centres, and internet connectivity" (Wilton Park, p.7) and to "prioritize AI in national budgets" (Policy Blueprint, p.18). The language is exhortatory; there is no costed plan, no quantified ask, and no proposed financing instrument that an African finance ministry could actually use.
2. **Multilateral development banks, donors and development organisations** are then identified as the entities expected to do the heavy lifting. The Policy Blueprint states explicitly that "development organizations play a key role supporting RECs and African countries on their AI development, from financing infrastructure projects for AI such as data centers and energy sources to promoting national AI skilling initiatives" and that "development banks can also derisk investments into AI-led startups". The Wilton Park report flags USAID's role in combining "digital infrastructure investments with AI-specific training programs". German GIZ, UK FCDO, the Commonwealth Secretariat, the Mastercard Foundation, the African Development Bank and the World Bank all appear as named providers of capital or technical assistance.
3. **The private sector** — in practice meaning Google and the other US hyperscalers — then supplies the missing capital expenditure, the operational expertise, the cloud credits, the language models, and the training pipelines. In the Skilling Blueprint, the private-sector contribution is enumerated with unusual precision: Google's $37 million 2025 cumulative AI-skilling contribution, the $5.8 million 2024 sub-Saharan commitment, the $15 million MENA commitment, the Hustle Academy, free Gemini for university students in six countries, $25,000-educator and 20,000-Nigerian programmes. Other hyperscalers are not mentioned by name with comparable specificity.

The overall logic is therefore: **African states set the policy and create the enabling environment; MDBs and donors de-risk; hyperscalers build, own and operate**. A fourth corner is conspicuously absent.

None of the three documents seriously contemplates a model in which African private capital, African pension funds, African insurance companies, or African sovereign wealth funds finance the construction of Africa's digital backbone at scale. The Policy Blueprint mentions "venture capital" and "impact investing" only in the narrow context of seeding AI start-ups; it does not propose African institutional capital for the infrastructure layer. The Skilling Blueprint mentions African employers paying premia for AI talent, but not African capital investing in the training infrastructure itself. The Wilton Park report acknowledges "public and private funders" generically but its named private funders are venture capital and tech companies, not African institutional investors. The continent's existing infrastructure asset managers (Convergence Partners, Africa50, the Pan-African Infrastructure Development Fund, the SA Public Investment Corporation, the Aga Khan Fund for Economic Development) are absent from all three documents.

This is the unstated assumption. It is not that African states are claimed to be unable to finance their own backbone — a claim that would be contested and visible. It is that no African-financed model is proposed at all. The space where such a model would sit is filled instead with the triangle of (governments-set-policy) + (donors-de-risk) + (hyperscalers-build).

The financing architecture implied by the three documents is consequential because the entity that builds the backbone owns the dependency. If African states finance the cloud regions and the cables, they keep the operational sovereignty; if MDBs and hyperscalers finance them, they secure influence over how the infrastructure is used, what runs on it, and which standards it adheres to. The Policy Blueprint's recommendation that African economies "pool resources" and "coinvest and share common AI infrastructures" is the one passage in the corpus that hints at a self-financing model — but it is offered as a complement to, not a substitute for, the hyperscaler-led build. The document does not suggest that pooled African resources could finance the cable, region or hub layer outright.

This architecture is not unique to Google's commissioned material. It is the working assumption of most hyperscaler-engaged policy literature on African digital infrastructure, including the World Bank Group's *Digital Public Infrastructure for Development* framing (2024) and the Smart Africa *Smart Broadband 2025* strategy. It is so widely shared that it tends to be invisible to participants in the conversation. Naming it explicitly is the analytical step.

The SEACOM 2.0 counterexample. The unstated assumption that African capital cannot finance its own digital backbone at scale is contradicted by a single live datapoint that emerged in September 2025: SEACOM 2.0. The cable's announced design capacity (2 Pbps), fibre-pair count (48, a world first), and projected ready-for-service date (late 2029 / early 2030) are covered in §4.1.5. What

matters for the financing-assumption argument is the structure of the underlying capital stack. SEACOM 2.0 is projected to cost **US$1.5–2 billion** to construct (Topco Media interview with SEACOM CEO Alpheus Mangale, Jan 2026), and SEACOM intends to reach financial close by the end of 2026 by raising capital from **existing shareholders plus new investors** (SEACOM CTO Prenesh Padayachee at AfricaTech Festival 2025, reported via Connecting Africa, March 2026). SEACOM's existing shareholders are entirely African (and Aga Khan / Asian-development): Remgro 30%, the Aga Khan Fund for Economic Development / Industrial Promotion Services 30%, Convergence Partners 15%, Sanlam 15%, founder Brian Herlihy 10% (Convergence Partners disclosure of SEACOM ownership, March 2025). No hyperscaler equity. No MDB co-investment. No US development finance institution participation. A US$2 billion subsea cable with greater design capacity than every hyperscaler cable to Africa combined, financed entirely from African and Aga Khan private institutional capital.

The SEACOM 2.0 capital stack is not theoretical and it is not aspirational. It is the financing structure of the largest single piece of African digital infrastructure currently in execution. The fact that no hyperscaler-commissioned policy document acknowledges it is itself analytically significant.

3. Major investments, engagements and plans

3.1. Undersea cables

3.1.1. Equiano (live)

- **What it is**: Google's privately funded subsea cable, running from Portugal along Africa's Atlantic seaboard with branches into Togo, Nigeria, Namibia, South Africa, and St. Helena. Uses space-division multiplexing for ~20× the capacity of the previous generation of West African cables (Google Cloud Blog). Named for Olaudah Equiano, the 18th-century Nigerian-born abolitionist.
- **Status**: Operational; landings completed in Togo (Mar 2022), Nigeria, Namibia, St Helena, and South Africa through 2022–2023.
- **Documented impact**: Country-level Economic Impact Assessments commissioned by Google from Africa Practice / Genesis Analytics project ~21% lower retail internet prices, 6× faster speeds, and (for Nigeria) ~1.6 million indirect jobs and US$10.1bn added GDP by 2025 (Africa Practice EIA, Nigeria, 2022; Africa Practice EIA, Togo, 2022). These figures are Google-commissioned and should be read accordingly.
- **Secondary deal**: Liquid Intelligent Technologies (Cassava) acquired a fibre pair on Equiano in 2022, giving Liquid a direct east–west pan-African route (Ecofin Agency, 2022).
- **Resilience-tier buyer**: MainOne, now an Equinix company, subsequently lit additional capacity on Equiano to add redundancy for West African enterprise customers following regional subsea cable outages (Developing Telecoms, 2024). Equinix is therefore both a host operator of Google cloud-customer access in West Africa and a wholesale buyer of Google's own subsea capacity — an instance of the infrastructure interdependence pattern documented in §3.2.5.

3.1.2. Umoja (in build, 2027 target)

- **What it is**: Announced 2024, Umoja will be the first fibre-optic route directly connecting Africa to Australia. The terrestrial leg runs Kenya → Uganda → Rwanda → DRC → Zambia → Zimbabwe → South Africa, where it then drops to a subsea segment crossing the Indian Ocean to Perth (Submarine Networks; Submarine Cable Map).
- **Status**: In construction; ready-for-service targeted **2027** (Subsea Cables Net, Sep 2025).
- **Terrestrial construction partner**: Liquid Intelligent Technologies (Cassava subsidiary) is building the seven-country overland segment, giving Liquid privileged commercial position on the corridor (Mobile Europe; ITWeb).

- **Strategic significance**: Bypasses the historical Europe-routed traffic between East Africa and Asia-Pacific, and pairs neatly with Google Cloud's Sydney region for low-latency intercontinental AI inference.

3.1.3. Four subsea connectivity hubs (announced Sep 2025)

Announced by Manyika and Okosi to Bloomberg in September 2025, Google plans four new infrastructure hubs in the north, south, east and west of Africa, each combining cable landing stations plus adjacent data-centre capacity (Bloomberg, 18 Sep 2025; Developing Telecoms).

These four hubs (announced September 2025) are distinct from, and broader than, the four interconnect sites announced in May 2024 and described in §3.2.2. The hubs are landing-plus-compute; the interconnect sites are connection-and-caching only. The 2025 hubs include locations — most plausibly North Africa and the east coast — that the 2024 interconnect plan did not cover.

- **Locations**: Not all confirmed publicly; Kenya and South Africa are expected to host two of the four; the implication is that the remaining two are in North Africa (Egypt or Morocco) and West Africa (likely Nigeria, plausibly Senegal or Ghana).
- **Timeline**: Hubs to be completed within ~three years (by ~2028).
- **Strategic meaning**: This is the convergence point where Google's African cable strategy starts to look like a regional data-centre strategy in disguise — see §3.2.2

3.1.4. Google + Meta's share of capacity prior to SEACOM 2.0

The African subsea landscape between 2026 and 2029 will be dominated by a small cluster of >100 Tbps systems built or owned by two US hyperscalers. The picture changes fundamentally when **SEACOM 2.0** enters service in late 2029 / early 2030; the analysis below frames the hyperscaler share before that step change.

Why legacy systems can be set aside. A 2025 review of African subsea infrastructure concluded that the aggregate design capacity of the long-standing legacy cables to the continent (WACS, ACE, EASSy, the original SEACOM, MainOne, TEAMS, SAT-3, SAFE) is dwarfed by Equiano and 2Africa together by roughly a factor of twenty (Submarine Telecoms Forum / industry analysis cited in TeleGeography commentary). In the pre-hyperscaler era (~2020) the total design capacity landing on African shores was on the order of 100 Tbps; Equiano on its own (144 Tbps) and 2Africa on its own (180 Tbps) each exceed that historical total. For the purpose of estimating share, legacy systems can therefore be treated as analytical rounding.

The >100 Tbps systems serving Africa, 2026–2029.

Cable	Design capacity	Fibre pairs	Status (May 2026)	Ownership
Equiano	144 Tbps	12 (SDM)	In service since March 2023	Wholly Google-owned (Google Cloud)
2Africa (incl. Pearls extension)	~180 Tbps (168 Tbps on West Africa trunk)	16	Core trunk activated November 2025; Pearls landings rolling through 2026	Consortium of eight: Meta, Bayobab (MTN), China Mobile International, Orange, center3 (stc), Telecom Egypt, Vodafone, WIOCC (Meta engineering, Nov 25)
Umoja	Undisclosed (assumed ≥Equiano-class, i.e. 144+ Tbps)	Undisclosed	Announced May 2024; SubCom contracted as subsea manufacturer; RFS ~2027	Wholly Google-owned; terrestrial leg by Liquid/Cassava (Google Blog, May 2024; cf. TechCentral, May 2024)
Project Waterworth	"Highest-capacity available"; capacity undisclosed	24 (highest in service)	Announced February 2025; RFS not disclosed (industry expectation 2027–2028)	Wholly Meta-owned; ~50,000 km USA → Brazil → South Africa → India (Meta engineering blog, Feb 2025)
SEACOM 2.0	2,000 Tbps (2 Pbps)	48 (a world first)	Announced 24 Sep 2025; financial close targeted Q4 2026; RFS late 2029 / early 2030	SEACOM private consortium: Remgro, Convergence Partners (Andile Ngcaba), Sanlam, IPS/Aga Khan (SEACOM press release, Sep 2025)

Estimating Google's share (2027–2029 window). Google directly owns two of the five systems above: Equiano (144 Tbps, sole owner) and Umoja (capacity undisclosed; conservatively at least Equiano-class at ~144 Tbps, plausibly higher given a 2027 build date and SubCom's current product line). That gives Google in the order of 290+ Tbps of wholly-owned, hyperscaler-controlled design capacity landing on or transiting Africa by 2027–2028. This is the largest single-entity holding of African subsea capacity in the continent's history. The exact figure cannot be confirmed because Google has never published Umoja's design capacity — see §6.1 for the full list of unanswered Umoja questions.

Estimating Meta's share. Meta is a consortium member of 2Africa (180 Tbps total, spread across eight owners — Meta's effective slice is therefore a fraction of the headline number, and the partition is not publicly broken out) and the sole owner of Project Waterworth (capacity undisclosed but 24 fibre pairs places it in the highest class currently in service). Treating Waterworth conservatively at Equiano-class and adding a one-eighth notional share of 2Africa

yields a Meta share of roughly **170–200 Tbps** of design capacity attributable to the company, with the true figure likely higher given the fibre-pair count of Waterworth.

Combined hyperscaler share, 2027–2029. Adding Google's ~290+ Tbps to Meta's ~170–200 Tbps gives a combined Google + Meta share of roughly 460–500 Tbps out of an estimated total new high-capacity (>100 Tbps) build of 640–680 Tbps serving the continent in this window. On these estimates, Google and Meta together account for **approximately 65–75% of the new design capacity** landing on African shores between 2027 and the SEACOM 2.0 ready-for-service date. The two companies are, in the words of one industry analyst, "the major drivers behind these new cables… a big shift that began a few years ago with digital platform companies beginning to eclipse telecoms companies as the major investors in undersea cables" (TeleGeography commentary cited in industry press, 2025).

3.1.5. The SEACOM 2.0 step change

Once SEACOM 2.0 enters service in late 2029 / early 2030, a single African-owned consortium cable will, at 2 Pbps of design capacity, **exceed the design capacity of all hyperscaler systems serving Africa combined**. South Africa's total landing capacity is projected to rise from approximately 500 Tbps today to over 2,500 Tbps once Umoja, Waterworth and SEACOM 2.0 are all in service. That is a fundamental shift in the structure of the market: from a window in which two US hyperscalers privately own the majority of high-capacity routes, to one in which the single largest pipe is African-owned, open-access, and built on a 48-fibre-pair architecture that has never previously been deployed. The SEACOM 2.0 CEO acknowledged at AfricaCom in November 2025 that the 48-pair design's commercial viability still needs to be confirmed — a candid caveat that should be carried alongside the headline number.

Caveats on this estimate. Three uncertainties qualify the figures above. First, **Umoja's design capacity is undisclosed** — the 144+ Tbps assumption is a floor, not a published number (see §6.1). Second, **Waterworth's capacity is undisclosed** — the 24-fibre-pair count is the only public anchor. Third, **Meta's effective share of 2Africa is not publicly broken out** across the eight consortium owners. The 65–75% combined-share range is therefore an estimated band, not a precise measurement; it could be revised upward if Umoja or Waterworth is in fact a 200+ Tbps system, or downward if Meta's 2Africa slice is contractually smaller than a one-eighth notional. The underlying analytical conclusion — that Google and Meta together dominate new high-capacity African subsea capacity in the 2027–2029 window, and that SEACOM 2.0's entry in 2030 reorders the landscape — is robust to all three uncertainties.

3.2. Data centres and the Johannesburg cloud region

3.2.1. `africa-south1` — Johannesburg

- **Status**: Operational since **January 2024**; ceremonially launched March 2025. Google's first and (as of May 2026) **only** cloud region on the continent (Google Cloud Blog; TechCrunch; AI-Impact South Africa).
- **Architecture**: Three availability zones (`-a`, `-b`, `-c`), all in greater Johannesburg.
- **Compute coverage**: 167 of Google's 434 Compute Engine machine types are available; general-purpose, compute-optimised and memory-optimised series are supported, including Google's Axion (ARM) chips. Crucially, no GPU or TPU accelerators are available locally — AI/ML workloads must run cross-region (gcloud-compute.com).
- **Carbon profile**: 16% Clean Energy Factor, 646 gCO_2eq/kWh — reflective of South Africa's coal-dominated grid.
- **Documented economic claim**: Google South Africa and Public First claim the region will generate ZAR 977 billion cumulative GDP for South Africa over a decade and 40,000+ jobs by 2030 (Public First Sub-Saharan Africa Report, 2024).

3.2.2. Four other African cities with a smaller Google Cloud footprint

A full Google Cloud region is the most substantial form of Google presence: it is a campus of data centres where customer workloads actually run. A lighter form of presence is what Google calls an "interconnect site" — a city where Google has not built a region, but has arranged a private, high-speed entry point into its global network. A customer in that city can plug their own infrastructure directly into Google's network through a participating local provider, rather than reaching Google over the public internet. The traffic still ultimately reaches a Google Cloud region somewhere (today, Johannesburg, or one of Google's European or US regions); the interconnect site is the door, not the destination.

Google has announced four such doors into the African market:

City	Status
Johannesburg	Operational
Cape Town	Announced 2022
Lagos	Announced 2022
Nairobi	Announced 2022

These four interconnect sites are not the same as the four 'infrastructure hubs' announced in September 2025 (§3.1.3). The interconnect sites do not contain Google data centres; they are doorways into Google's global network hosted inside third-party colocation buildings.

The commercial logic is straightforward. Interconnect sites are much cheaper to deploy than a full region and serve as a test of demand: if banks, telcos and large enterprises in Lagos or Nairobi sign meaningful contracts for direct connectivity into Google's network, that builds the business case for Google to eventually invest in a second full African region in that location. **Liquid C2 became the first local provider to offer this service on the continent in June 2024** (Liquid Intelligent Technologies; ITWeb).

3.2.3. A second full African region — not yet announced

As of May 2026 Google has not announced a second full Cloud region in Africa to complement Johannesburg. AWS has begun deploying lighter-weight "Local Zones" in South Africa and Kenya; Microsoft has data-centre capacity in both Johannesburg and Cape Town. Google's apparent sequencing is cables first, then the four-hub continental plan announced in September 2025 (which combines cable landing stations with adjacent data-centre capacity), then a second region announcement at one of those hub locations once the hubs are operational (Africa Interconnection Report 2025).

3.2.4. Google's role in supplying cloud across the African data-centre market

A full picture of Google's cloud footprint in Africa cannot be drawn from the Johannesburg region alone. Like every hyperscaler, Google **hosts far more capacity than it owns**: a single wholly owned cloud region anchors the supply, but the working footprint is delivered through anchor tenancies, colocation deployments, dedicated interconnects, on-ramps, and partnership agreements inside third-party facilities. This section draws on a 378-facility register of operational, under-construction and planned data centres across 49 African countries (the African Data Centre Register, compiled in a parallel research workstream; see attached `data-centres-1.csv` and its metadata) to characterise Google's share of the continent's cloud-delivery footprint relative to the other hyperscalers.

Headline numbers (May 2026 register). Of 378 catalogued facilities, **Google has a confirmed engagement in 182 (48%)**, against 168 (44%) for Microsoft/Azure and 167 (44%) for AWS. Restricting to the 318 operational facilities, Google is present in **156 (49%)**, against Microsoft 137 (43%) and AWS 140 (44%). Google is therefore the most broadly distributed hyperscaler across the African colocation market on a facility-count basis, despite being the last of the three major US hyperscalers to open a local cloud region (Johannesburg, January 2024 — five years after Microsoft Azure went live in Cape Town and Johannesburg in March 2019, and four years after the AWS Cape Town region in April 2020) (Microsoft Azure blog, March 2019; Google Cloud blog, Jan 2024).

Ownership versus hosting — the central pattern. Across the entire 378-facility register, only **one** facility has Google as its ultimate parent: the Google Cloud Johannesburg Region (`africa-south1`). Microsoft appears as ultimate parent of two facilities; Amazon of one. The other 374 facilities Google operates through are owned and operated by third parties — African colocation operators (Teraco, Africa Data Centres, Open Access Data Centres / WIOCC, Raxio, iColo, Paratus, Rack Centre, MainOne/Equinix), state-owned enterprises (Angola Cables, Safaricom, MTN's various country units), and globally listed colocation platforms (Digital Realty, Equinix). The dataset's deliberate ownership focus thus understates Google's operational footprint by design — and that gap is the analytically important part: **hyperscalers in Africa are tenants and partners, not owners, of the physical estate they consume.**

Parsing the dataset's narrative `hyperscaler_relationships` field for the 182 Google facilities yields the following recurring relationship types:

Relationship type	Frequency	What it means
Anchor tenancy	86	Google is a foundational long-term customer of the facility
Partnership	71	Formal commercial agreement (often Cloud Interconnect, Equiano landing, or co-marketing)
Direct Connect / dedicated interconnect	69	Customer-to-Google private line out of that facility
Interconnect / peering	43	Facility carries Google traffic via IXP or private peering
On-ramp	27	Facility hosts a Google Cloud on-ramp or Dedicated Interconnect location
Gemini / AI rollout	17	Facility is associated with Gemini availability or AI workload deployment
Equity / investment	19	Google is an investor in the facility or its operator (Equiano-related, Cassava, etc.)

A single facility typically falls into several of these categories at once; the table records frequencies, not exclusive bins.

Country distribution — a continental pattern, not a South African one. Google-engaged facilities are spread across 30+ countries. South Africa accounts for 44 of the 182 (24%), followed by Kenya (21), Nigeria (18), Uganda (12), Morocco (9), Ghana (8), Mozambique (8), Egypt (7), Angola and Tanzania (6 each), Rwanda and Zimbabwe (5 each). In several smaller markets Google's coverage is effectively complete: in Uganda, Ghana, Mozambique, Angola and Zimbabwe, Google has a confirmed presence in **100% of the facilities that have any hyperscaler engagement at all**; in Tanzania 86%, Kenya 81%, Nigeria 78%. Outside South Africa (where all three US hyperscalers are

saturated), Google is consistently as broadly distributed as Microsoft and more broadly distributed than AWS.

Where Google trails. The exception is North Africa. In Egypt, Google is present in 7 of the 17 facilities with hyperscaler engagement (41%), well behind AWS (16/17) and Microsoft (12/17). The Egyptian market is anchored on Azure's regional buildout and on AWS's CLOUD-Act-compliant offerings into the financial sector; Google's lower share reflects the absence of an Equiano landing in Egypt and the fact that Umoja's Mediterranean leg has not yet been activated. In Algeria, of ten registered facilities only one has any hyperscaler engagement at all, and that one is Google. The North African pattern is therefore: Egypt is an AWS/Azure stronghold; the Maghreb and Algeria remain underbuilt for all hyperscalers.

Where Google is delivered through — the operator concentration. Google's African cloud delivery rides on a remarkably concentrated set of host operators. The top ten operators hosting Google are:

Operator	Google present	Ultimate parent / control
Open Access Data Centres (WIOCC Group)	10	WIOCC consortium
Business Connexion (BCX)	9	Telkom SA (SA government 40%+)
Teraco (a Digital Realty Company)	9	Digital Realty Trust, NYSE:DLR
Digital Realty (other African brands)	6	Digital Realty Trust, NYSE:DLR
Raxio Group	6	Roha Group / Meridiam
Africa Data Centres	6	Cassava Technologies (Strive Masiyiwa)
MTN Uganda	5	MTN Group
iColo (Digital Realty)	5	Digital Realty Trust
Equinix	5	Equinix Inc., NASDAQ:EQIX
INWI Business (Wana Corporate)	4	Al Mada (Moroccan royal holding)

Two features of this list are analytically important. First, **two US-listed REITs (Digital Realty and Equinix) account for 25 of the top 60 Google-Yes facility-tenancies** through their various African brands (Teraco, iColo, MainOne, Equinix African platforms). The combination of Google's cloud-region anchor, Digital Realty's colocation footprint, and Equinix's interconnect platform reproduces in Africa the same three-corner enterprise architecture that dominates the US and European markets. Second, the African-controlled operators in this list (Cassava/Africa Data Centres, WIOCC's OADC, MTN, Raxio) are also the principal vehicles through which Google reaches secondary markets — a relationship covered in detail in §4.5 (Cassava) and §4.4.2 (Smart Africa).

3.2.5. Teraco Cape Town and the cable-to-cloud handoff

The two preceding subsections established (i) that Equiano lands at Melkbosstrand, north of Cape Town, and (ii) that Teraco hosts more Google facility tenancies than any other African colocation operator (nine, across CT1, CT2 and the Johannesburg JB campuses). What converts these two facts into a single operational system is the inland backhaul into Teraco's Cape Town campus — the point at which Google-owned subsea capacity becomes usable cloud service.

The cable-and-the-region are commonly discussed as separate items in Google's African strategy — §3.1 treats Equiano and Umoja as connectivity infrastructure, §3.2.1 treats `africa-south1` as cloud infrastructure. In operational reality the value comes from the join: a Google-owned subsea fibre system at the coast is converted, inside a US-listed REIT's interconnection campus, into a Google-routed enterprise on-ramp that is then accessed across the continent through Cloud Interconnect partner agreements. Equiano without Teraco would be 144 Tbps of expensive coastal capacity with no commercial path to the enterprise market. Teraco without Equiano would be a carrier-neutral colocation operator with no privileged hyperscaler relationship. The combination is what produces the working African cloud. Operational sovereignty over an African enterprise's cloud workload sits not in any single building but in the interaction between a Google-owned cable, a Digital Realty–owned campus, a Liquid/Openserve/WIOCC-operated terrestrial fibre leg, and a Google-routed on-ramp.

3.3. Overland fibre and satellite/optical connectivity

3.3.1. CSquared

Founded as an internal Google project in 2013 and spun out in 2017 as a four-way partnership of Google, Convergence Partners, IFC and Mitsui & Co. with a US$100m fund. CSquared has built >3,000 km of carrier-neutral fibre across Ghana, Uganda, Liberia, Togo and the DRC. In August 2025 it announced a West African backbone expansion to connect coastal and landlocked ECOWAS countries (CSquared, Aug 2025; Google Blog; IFC).

Charles Murito served on the CSquared board during his time as Google Kenya Country Director.

3.3.2. Project Taara (free-space optical / laser internet)

Spun out of Alphabet's X moonshot factory after Project Loon (balloons) shut down in January 2021. Taara uses high-bandwidth invisible-light beams between rooftop terminals; deployed in 13+ countries with rollouts via Liquid Intelligent Technologies in seven African countries and >50 communities. A signature achievement: beaming 700TB of data across the Congo River between

Brazzaville and Kinshasa where laying fibre was infeasible (Project Taara; The Verge, 2021; Connecting Africa).

3.3.3. Overland fibre — the strategic pivot

The Africa Report flagged a deliberate shift by Google, Meta and Amazon from sea-only to overland investment (The Africa Report). The logic: subsea cables solved cross-continent capacity; intra-African and inland bottlenecks are now the binding constraint for cloud and CDN economics. Google's primary overland vehicles are (i) CSquared, (ii) the Umoja terrestrial route built by Liquid, and (iii) co-financing of Liquid's broader 110,000 km fibre footprint.

3.3.4. Satellite

Google does not operate its own satellites for African connectivity. Project Loon was wound up in January 2021. There is no public Google equivalent of Starlink/Kuiper, although Google retains historic minority positions in SpaceX. Google's "satellite" play in Africa is mostly imagery-based (Open Buildings, Flood Hub, Maps) rather than connectivity.

3.4. AU, ECA, and Smart Africa MoUs

This is the most institutionally significant — and most contested — strand, and the principal vehicle of the public-policy track described in §2.2. Six distinct formal arrangements now exist or are in motion:

Counterparty	Type	Date	Signatories	Scope
UN Economic Commission for Africa (ECA)	MoU	Feb 2024 (renewed Nov 2025)	Doron Avni (Google) and ECA leadership	Digital skills, startups, financial inclusion, cybersecurity, AI policy; Regional Data Commons for Africa initiative backed by US$750k from Google.org as part of US$2.25m broader contribution (ECA, Nov 2025)
African Union Commission (AUC)	MoU	17 Feb 2026	Charles Murito (Google) and Commissioner Lerato D. Mataboge (AUC)	AI infrastructure, talent, R&D, MSMEs, AI governance; "AI readiness training for African public officials"; free Gemini Pro and NotebookLM access (including Amharic) (AU)

Counterparty	Type	Date	Signatories	Scope
AfCFTA Secretariat — ADIEP	Programme partnership (not a formal MoU)	Launched 17 Nov 2025	AfCFTA SG Wamkele Mene + Google's Charles Murito; delivered by UpSkill Universe	Train 7,500 SMEs across 19 AfCFTA states in AI, Google Cloud, cross-border digital trade; 25 cohorts in EN/FR/AR/PT; runs to June 2026 (Capital FM Kenya; West African Business Journal)
World Bank Group	Strategic alliance	Feb 2026	Google + WBG	Deploy "sovereign, AI-powered open networks" for DPI in African nations (Google Blog, Feb 2026)
ITU + will.i.am	Skills initiative	Sep 2025	Google + ITU	US$1m commitment for AI/robotics training to African students, announced at UNGA
Smart Africa Alliance	Platinum private-sector membership	29 Jul 2021 (active)	Google + Smart Africa Secretariat (DG Lacina Koné); chaired by President Paul Kagame	Single Digital Market by 2030; skills, broadband, data governance, AI, cloud, digital government, payments (Smart Africa press release, Jul 2021)

3.4.1. The AUC–Google MoU — "AI for Government"

The most strategically significant of Google's institutional agreements with continental bodies was signed on 17 February 2026 at the African Union Headquarters in Addis Ababa. The MoU is titled "AI for Government: Strengthening Digital Public Infrastructure, Education, and Climate Resilience" and was signed by H.E. Lerato D. Mataboge, AU Commissioner for Infrastructure and Energy, and Charles Njenga Murito, Google's Regional Director for Sub-Saharan Africa, Government Affairs and Public Policy (AU press release, 17 Feb 2026; AU media advisory). It is explicitly framed as a vehicle to implement the AU's Continental AI Strategy and the Digital Transformation Strategy for Africa (2020–2030).

Scope. The MoU covers six workstreams, which mirror — almost verbatim — the four-pillar strategy Google describes in its own Africa communications (§2.1): AI and digital infrastructure; skills development; innovation and entrepreneurship; policy and responsible AI; AI adoption in priority sectors (climate resilience, agriculture, health, education, trade); and digital public infrastructure. The signing-day announcement listed three flagship deliverables: an AI-skilling programme for African public officials, free Gemini access for educators and learners across AU

Member States, and joint work on Africa-relevant climate and agriculture AI applications (Tech Review Africa, 19 Feb 2026; Quidah, 13 Feb 2026).

The sovereignty framing. Both parties used the language of "sovereign AI" and "sovereign digital capacity" at the signing — language whose Google-side adoption is documented in §2.1 (the access-to-agency shift). Commissioner Mataboge described the agreement as an investment in "infrastructure, talent development and governance frameworks necessary for sustainable AI integration"; the AUC framed it as a step toward "securing Africa's digital future". The 1.5 trillion US dollar projected AI contribution to African GDP by 2030, cited at the signing, originates in Google-commissioned analysis (Google Public Policy Blog) and should be read with the qualifications discussed in §6.

What the MoU does not specify. No dollar value is publicly attached to the AUC MoU itself; no governance mechanism, no joint steering committee, no disclosure regime, and no exit clause is described in the publicly released text. The agreement is, like the ECA MoU below, a framework instrument that empowers subsequent project-level agreements rather than a binding investment commitment. Specific dollar commitments at the signing (Gemini for educators, the public-official skilling programme) were attributed to Google.org and to Google Cloud as separate parallel announcements, not as line items in the MoU. The asymmetry — AUC contributing convening authority and access to 55 Member States, Google contributing tools, training and convened private capital — is similar in shape to the ECA arrangement.

Analytical significance. This MoU is the highest-level institutional access point Google has secured anywhere in Africa. The AUC is the executive arm of the African Union and the natural counterparty for any AU-wide digital initiative, including DPI standards-setting through the AU's emerging digital trust frameworks. The MoU was signed by the Commissioner for Infrastructure and Energy (Mataboge), not the Commissioner for Education, Science, Technology and Innovation — a portfolio routing that places the AI agenda inside the AU's infrastructure machinery and alongside the Programme for Infrastructure Development in Africa (PIDA). The implication is that AI is being institutionalised at the AU as physical/digital infrastructure (the territory in which Google is dominant) rather than as a research or education portfolio (where AU influence is more diffuse and where competing donor relationships exist).

3.4.2. The ECA–Google MoU — Data Commons and AI policy capacity

A complementary framework agreement was signed earlier with the UN Economic Commission for Africa (ECA) on 19 February 2024 in Addis Ababa, on the margins of the 2024 Africa Business Forum (ECA press release, 19 Feb 2024). Unlike the AUC instrument, the ECA MoU is explicitly time-bounded as a 2024–2026 partnership and has already passed its two-year review milestone, allowing this report to evaluate it on delivered output rather than stated intent.

Scope and signatories. The MoU is framed as a general collaboration around ECA's mandate — digital development in Africa under the AU Digital Transformation Strategy (2020–2030) — and Google's Digital Sprinters Framework. Five priority areas were named at signing: digital skills development for Africa's young population; startup development; financial inclusion; cybersecurity and online safety; and AI policy research for African policymakers. The agreement was signed under ECA Executive Secretary Ambassador Claver Gatete; the Google-side principal is Doron Avni, Vice President for Government Affairs and Public Policy in Emerging Markets.

What has actually been delivered. Three workstreams have produced documented output by the partnership's two-year review in November 2025:

- **AI policy training for public officials.** A series of joint workshops and policy-oriented engagements have, on ECA's account, supported "1,000 Member State representatives in navigating emerging AI technologies" (ECA press release, 26 Nov 2025). ECA credits this work with shaping Africa's unified positions in the 2025 Cotonou Declaration adopted at the WSIS+20 Africa Review and the consolidated inputs of the 14th African Internet Governance Forum.

- **Tailored AI/cybersecurity/cloud policymaking courses.** A May 2025 expansion rolled out training programmes for young Africans and government officials in AI, cybersecurity, robotics and cloud computing (ECA press release, 12 May 2025).

- **Regional Data Commons for Africa.** The flagship deliverable, announced 26 November 2025: a Google.org US$750,000 contribution plus integration of Google's Data Commons technology into a public data infrastructure initiative jointly led by ECA and the UN Department of Economic and Social Affairs (DESA). The project sits inside a broader US$2.25 million Google.org contribution to strengthening Africa's public data infrastructure for AI, announced in parallel and structured to involve PARIS21 and other data-statistics partners (Google Blog on AI-ready data in Africa).

The Data Commons workstream is the analytically consequential one. Africa's statistical systems are fragmented — uneven interoperability, weak shared infrastructure, inconsistent metadata standards. A Regional Data Commons that integrates "high-impact datasets from across the continent" through Google's Data Commons technology layer addresses a genuine and binding constraint on African policy-making. It also **places Google's data-graph technology at the centre of a UN-endorsed African public-data initiative — the technology becomes the de-facto reference infrastructure for AI-policy-relevant statistics across the continent.** ECA's framing treats this as positive; the sovereignty implications (US-headquartered data infrastructure inside African public statistical systems) are not addressed in the public partnership documents.

Analytical significance. The ECA MoU is materially smaller in headline dollar value than Google's commercial infrastructure investments — US$2.25 million Google.org spend across two years against US$1bn+ in cables and data centres — but it is structurally important for two reasons. First, it gives Google a continental venue for **AI-policy capacity-building** with African civil servants, before those civil servants legislate the AI rules that will govern Google's African operations. Second, the Data Commons workstream embeds Google technology inside the AU's preferred statistical apparatus, creating the kind of soft-infrastructure dependency that is hard to reverse once Member-State officials are trained on it. Together, the AUC MoU (executive-branch reach) and the ECA MoU (technical-and-statistical reach) give Google institutional access at the two levels — political and analytical — at which continental AI and DPI policy is now being shaped.

3.4.3. Smart Africa Alliance

The Smart Africa Alliance is the most under-discussed and arguably the most strategically efficient leg of Google's public-policy track. Founded in 2013 by seven African Heads of State, chaired by Rwandan President Paul Kagame, and run from a Kigali secretariat by Director General Lacina Koné since March 2019, the Alliance now brings together 42 member states representing over 1.2 billion people and more than 50 private-sector partners, with the African Union, ITU, World Bank, AfDB, UNECA, GSMA and ICANN as institutional partners. Its mission is the creation of a Single African Digital Market by 2030. It is the only continental body where hyperscalers sit alongside African Heads of State on near-equal procedural footing.

Google's accession. On 29 July 2021, Google joined the Alliance as a platinum private-sector member — the top membership tier, shared with Microsoft, Meta (then Facebook), Orange, Liquid Telecom, Intel, Ericsson, Huawei, HPE, Inmarsat and Tata Communications (Smart Africa, Jul 2021). No financial figure is publicly attached to the membership itself, but platinum carries observer rights across all flagship working groups and a permanent seat at the Steering Committee.

Committed work-streams. The 2021 announcement lists Google's commitments across the Alliance's standing flagships: digital skills development; broadband connectivity; data governance; ICT start-ups and innovation ecosystem; adoption of AI; innovative use of data; cloud technologies; digital government; and inclusive payment systems. These map almost one-for-one onto Google's own four-pillar Africa strategy (§2.1) — meaning the Alliance is a venue where Google's corporate strategy and the AU-endorsed continental strategy are deliberately aligned vocabulary-for-vocabulary.

Concrete contributions to date. Google's contributions sit principally under four Smart Africa workstreams:

- **Smart Broadband 2025 (connectivity flagship).** Equiano, the four announced subsea hubs, the Umoja build, and the CSquared/Cassava terrestrial fibre work are all framed by both parties as

contributions to Smart Africa's Smart Broadband 2025 strategy, which targets affordable, high-capacity broadband across all member states.

- **Smart Africa Digital Academy (SADA) (skills flagship).** SADA launched in 2022 to close the continental digital-skills gap. Google routes its Grow with Google SSA curriculum, the Hustle Academy, the Nigeria AI Academy and — most recently — the **AI-readiness training programme for African public officials** (launched alongside the AUC MoU with Apolitical and Cori Zarek) into SADA-aligned delivery channels, contributing to the 3 million students/teachers by 2030 target.
- **Data governance and AI flagships.** The November 2025 US$2.25 million Data Commons for Africa commitment with UNECA and PARIS21 intersects directly with Smart Africa's Data Governance Blueprint. Google's AI policy team also contributes to the AI flagship that underpinned the 2025 **Africa AI Declaration**.
- **Transform Africa Summit (TAS).** TAS is the Alliance's flagship annual convening. Google has been a recurring sponsor and platform speaker, including at TAS 2025 in Conakry, Guinea (Nov 2025), themed around "a united and sovereign digital Africa" — language whose adoption by Google's communications (§2.3) is not coincidental.

Hedging within the Alliance — the analytical point. Two 2026 developments deserve attention because they show Smart Africa is starting to hedge against hyperscaler dependence while keeping Google at platinum tier:

- In **March 2026**, Smart Africa signed an MoU with the CERTA Foundation on data governance and "data embassies" — an explicitly non-hyperscaler vehicle for sovereign data hosting.
- In **April 2026**, Smart Africa and Swiss firm RealTyme announced a sovereignty-focused partnership built around "absolute data sovereignty and decolonisation", "state-controlled communication enclaves", and protection against "unauthorised foreign jurisdiction, commercial data mining, and external 'kill switches'". The language is unmistakably aimed at hyperscaler exposure — Google included.

Read alongside the AUC–Google MoU of 17 February 2026, the picture is one of **dual-track hedging on both sides**: Smart Africa keeps Google inside the tent at platinum level (extracting skills, infrastructure and convening value) while building parallel sovereignty-first relationships with smaller, more controllable partners. This is the most analytically interesting strand of the entire relationship for DPI sovereignty work, because it is the venue where the contradiction between "single digital market enabled by hyperscalers" and "sovereign digital capacity" is being played out in real time.

3.5. Support for AfCFTA

There is no publicly documented standalone MoU between Google and the Africa Continental Free Trade Area (AfCFTA) Secretariat as a legal entity. The AfCFTA Secretariat has signed formal MoUs with sovereign governments (US, UK, Australia), UN bodies (UNCTAD, UNDP, ECA), and private actors (Zenith Bank, AGRA) — but no equivalent public document with Google. The Google–AfCFTA engagement runs through **programmatic** rather than treaty-style instruments, and through the umbrella of the AUC MoU which, technically, does not bind the autonomous AfCFTA Secretariat.

This matters because the AfCFTA Secretariat is responsible for implementing the AfCFTA Protocol on Digital Trade, whose Articles 20 (free cross-border data flows), 22 (restrictions on data localisation) and 24 (prohibition on source-code disclosure requirements) are tightly aligned with the digital-trade rules that the US Trade Representative championed at the World Trade Organization for over a decade. In October 2023 the Biden administration formally withdrew US support for those same positions at the WTO, citing the need to preserve domestic regulatory space for AI and competition policy — so the AfCFTA Protocol now codifies for Africa precisely the rules that the US itself has stepped back from.

Multi-model analysis (see the note Should the AU Advise the AfCFTA Secretariat to Cease its Google Relationship?) suggests these provisions amount to "regulatory capture of dominant corporate interests, particularly from the US" — a framing now endorsed by Research ICT Africa, 2025.

The most operationally developed of Google's continental skills engagements is the **AfCFTA Digital Inclusion & Entrepreneurship Programme (ADIEP)**, formally launched on **17 November 2025** in Accra by AfCFTA Secretary-General Wamkele Mene and Google's SSA Government Affairs Director Charles Murito (Ecofin Agency, 17 Nov 2025; Capital FM Kenya, Nov 2025; West African Business Journal, 18 Nov 2025). ADIEP is a free training initiative targeting 7,500 small and medium-sized enterprises that have been operating for at least six months across 19 AfCFTA member states — Nigeria, Kenya, South Africa, Ghana, Cameroon, Senegal, Togo, Côte d'Ivoire, Rwanda, Mauritius, Ethiopia, Tanzania, Namibia, Zambia, Angola, Mozambique, Egypt, Tunisia and Morocco — and runs in 25 cohorts of approximately 300 SMEs each, delivered between November 2025 and June 2026 in English, French, Arabic and Portuguese. Each cohort is an eight-week training period followed by a 30-day mentorship phase. Programme delivery is contracted to UpSkill Universe, a pan-African digital-skills provider led by CEO Gori Yahaya.

Curriculum and "delivery rail" — why ADIEP is institutionally Hustle Academy. ADIEP's curriculum sits on three modules: **Cross-Border Digital Trade** (co-developed with the AfCFTA Secretariat and tied to the AfCFTA Digital Trade Protocol); **Cloud for Small Businesses** (Google Workspace and Google Cloud); and **AI for Productivity** (Google Gemini for marketing, customer-data analysis, automation). Google describes ADIEP as **"powered by the Google Hustle Academy"** — meaning the

underlying training infrastructure, instructor pool and content scaffolding are Hustle Academy's, while ADIEP is the AfCFTA-branded vehicle that gives the same product line continental policy legitimacy and a Secretariat-endorsed reach into 19 jurisdictions (Murito, LinkedIn). The Hustle Academy itself has trained **more than 18,000 SMEs across Africa since 2022** under Google's own banner (Google Blog, Mar 2025), principally in Kenya, Nigeria and South Africa; ADIEP extends that machinery to a continental footprint without Google having to negotiate 19 separate national MoUs.

The downstream architecture. Graduates receive ongoing free Google Cloud credits and AI toolkits, plus access to a continent-wide alumni network. The AfCFTA Secretariat has stated that it will integrate participant data into its digital-trade dashboard to identify trade-bottleneck patterns in real time — a data-flow arrangement whose terms and access rights are not publicly disclosed. Murito has described the 7,500-SME figure as "phase one… proof of model" with explicit intent to scale further if traction holds. Programme graduates are positioned, in AfCFTA Secretariat communications, to become advocates for downstream regulatory harmonisation (digital-payment systems, cross-border e-commerce tariffs) — a use of trained SMEs as a policy-feedback constituency that should be read alongside the AfCFTA Digital Trade Protocol analysis in §6.5.

Analytical significance. ADIEP is the single most cost-efficient mechanism in Google's African public-policy track. For a programme cost that has not been publicly disclosed but is, by sector norms, in the low millions of dollars, Google obtains: continental-scale distribution of Workspace and Gemini to the SME segment that creates approximately 80% of African jobs; co-branded legitimacy from the AfCFTA Secretariat (the body responsible for implementing the Digital Trade Protocol whose Articles 20, 22 and 24 align closely with US digital-trade positions); a structured data flow back into Secretariat policy-making; and a 25-cohort pipeline of graduates whose first encounter with cloud, AI and cross-border digital trade is mediated through Google products. The transparency gap noted in §4.4 — that no standalone MoU between Google and the AfCFTA Secretariat as a legal entity has been published — applies equally to ADIEP itself: the contractual instrument, financial flow and data-sharing terms between Google, UpSkill Universe and the Secretariat are not in the public domain. The programme is also the cleanest live example of the "land-and-expand" pattern: free tools and skills today, enterprise lock-in tomorrow, policy-shaping influence through graduates and Secretariat embedding throughout.

3.5.1. Who influenced the drafting of the Digital Trade Protocol?

The public record does not name the individuals or organisations that drafted the AfCFTA Digital Trade Protocol, and what follows should be read as documented circumstantial evidence rather than attribution. The Protocol was negotiated under the AfCFTA Secretariat in Accra during Phase III of the AfCFTA negotiations, adopted by the AU Assembly in February 2024, with eight implementing annexes added in February 2025 (US ITA).

Formally, the drafting was led by African state parties through the AfCFTA Secretariat's negotiating structures, supported by the African Union Commission and the UN Economic Commission for Africa. Beyond that, the record is thin: no published list of drafters, no public minutes of the negotiating sessions, and no disclosure of which external advisers reviewed which articles.

What the public record does show is a set of external technical-assistance streams running in parallel with the drafting window (roughly 2020-2023):

- **Nextrade Group / Kati Suominen.** Suominen — later the author of Google-commissioned Nextrade blueprints discussed in §2.3 — produced two earlier papers directly relevant to the Protocol's content: a 2017 ICTSD policy roadmap on digital trade for developing countries (ICTSD/Suominen, 2017), and a 2020 paper co-authored with Michael Poor, *A Digital Protocol for the African Continental Free Trade Area (AfCFTA)*, published by the Alliance for eTrade Development (Alliance for eTrade Development). The 2020 paper addressed Phase III negotiations explicitly.

- **UK FCDO, via TradeMark Africa.** The AfCFTA Implementation Support Programme (July 2022 – June 2026), funded by the UK Foreign, Commonwealth & Development Office and implemented by TradeMark Africa, provided technical assistance to the AfCFTA Secretariat across multiple protocols (TradeMark Africa).

- **German development cooperation, via GIZ.** The *Support to AfCFTA II* project (commissioned by the German Federal Ministry for Economic Cooperation and Development) explicitly lists digital trade among its work areas and runs in parallel with the Protocol's drafting and implementation (GIZ). GIZ is also the lead implementer of the EU's Team Europe Technical Assistance Facility for the AfCFTA (2021-2024), co-funded by Germany, France and Sweden (Expertise France).

- **UNCTAD.** The AfCFTA Support Programme on non-tariff barriers, regulatory transparency and trade facilitation (2019-2022) sat alongside the digital-trade drafting window (UNCTAD).

- **World Bank and ICTSD-linked networks.** Both institutions have published extensively on digital-trade rule design for African economies; their staff and consultants overlap with the technical-assistance ecosystem around the Secretariat, though direct drafting involvement is not on the public record.

What the public record does not contain is any disclosure of which of these external actors saw draft text, which proposed specific article language, or how the Protocol's three key provisions — Article 20 (free cross-border data flows), Article 22 (restrictions on data localisation) and Article 24 (prohibition on source-code disclosure requirements) — converged on positions that closely mirror long-standing US and OECD-country negotiating preferences on digital trade (Brookings, March 2026). On the available evidence, the influence question can be narrowed but not resolved.

3.6. The Gemini distribution layer and the full-stack lock-in

Beneath the headline US$1 billion infrastructure pledge sits a less-discussed second pledge: the free distribution of Gemini. This subsection assembles the evidence for the scale of that distribution, names the full-stack chain that makes the giveaway commercially coherent, and quantifies the notional retail value implied by the public announcements. The argument that follows is, in compressed form: **Gemini's free distribution runs only through Google-owned surfaces, those surfaces are served from Google Cloud regions, Gemini's training and primary inference run on Google-owned TPU pods inside Google data centres, and in Africa those data centres are reached through Google-owned subsea cables and Google-anchor-tenant interconnection campuses. The full stack is the product. The giveaway is the demand-side calibration of the infrastructure spend, and the two are sized to fill each other.**

3.6.1. The full-stack chain — why "free Gemini" is not a generic AI subsidy

The African Gemini giveaway is materially different in shape from, for example, OpenAI's ChatGPT free tier or Anthropic's Claude.ai free tier, because of where the inference is served and what it is served from. The chain has five links, each of which has a non-Google substitute available *somewhere* but none of which is substitutable inside the free-tier distribution itself:

- **Surface.** Free Gemini reaches African students, SMEs, educators and developers only through Google's own surfaces — `gemini.google.com`, the Gemini Android and iOS apps, Workspace and Workspace for Education, Search AI Overviews, and Chrome's Gemini integration. Gemini 2.5 Pro and Flash are available through Amazon Bedrock and Microsoft Azure AI Foundry under multi-cloud distribution agreements, but those third-party-cloud channels are priced commercially and carry none of the African free-tier giveaways.
- **Cloud layer.** Those surfaces are served from Google Cloud regions. Gemini API access is offered through Vertex AI on Google Cloud (the production channel) and Google AI Studio (the developer channel). Free-tier traffic from African users routes onto Google Cloud infrastructure by definition.
- **Compute layer.** Gemini was trained on Google-designed TPU v5p and Trillium (v6e) pods. The published latency and throughput benchmarks for Gemini production serving are TPU-based. Google does serve a minority of Gemini inference on Nvidia GPUs and has, since 2024–25, offered selected enterprise customers Gemini training capacity on Nvidia Blackwell clusters — so the rhetorical claim of strict TPU exclusivity overstates the technical position. The defensible formulation is that Gemini is designed for, trained on, and primarily served from TPU pods, which exist only inside Google-operated data centres.

- **Facility layer.** TPU pods sit inside Google-operated data-centre regions. For African traffic, the nearest region is `africa-south1` (Johannesburg, live January 2024); secondary serving happens out of European regions reached through Google's private backbone.
- **Connectivity layer.** Those data centres are reached, for African traffic, through the Google-owned Equiano subsea cable, the Google-owned Umoja subsea cable (in build), Google-anchor-tenant agreements with Teraco's CT1, CT2 and JB campuses (the cable-to-cloud handoff described in §3.2.5), and the Google Cloud Interconnect on-ramps documented in §3.2.

Each link in the chain has a non-Google substitute. But for the **free distribution** that is the substance of the African giveaway — the AI Pro Plan handed to university students at no cost, the Gemini for Education tier supplied free to every signed-up Workspace for Education institution, the ADIEP cohort delivered through Hustle Academy — none of the substitutes apply. The free tier exists only inside the Google-owned full stack. This is not generic AI subsidy. It is a directed subsidy that only works inside Google's own infrastructure and which generates demand, telemetry and switching costs against precisely that infrastructure.

3.6.2. Five tiers of Gemini access seats committed for African distribution

Decomposing the African giveaway by named programme, on documented Google announcements:

Tier 1 — direct individual-subscription giveaways: Google AI Pro Plan for university students. Announced October 2025, available to eligible students aged 18+ in **eight named countries — Ghana, Kenya, Nigeria, Rwanda, South Africa, Zimbabwe, Egypt and Morocco** — at no cost for twelve months, with a 63-day registration window (7 October to 9 December 2025) (Google Blog, *Bringing Google's best AI tools to university students across Africa, at no cost*; Olumide Balogun, Google Africa, LinkedIn, Oct 2025). The plan retails at approximately US$19.39/month (Nigeria pricing), giving a twelve-month notional retail value of approximately US$233 per eligible student. Total tertiary enrolment in the eight countries is approximately 6.5 million (UNESCO and World Bank, most recent year), distributed roughly: Egypt 3.0 million, Nigeria 2.5 million, South Africa 1.1 million, Morocco 1.1 million, Kenya 0.6 million, Ghana 0.5 million, Zimbabwe 0.2 million, Rwanda 0.1 million. Cabinet-level launches were used to drive uptake: Kenya, 12 November 2025, ICT Cabinet Secretary William Kabogo (ict.go.ke; Michael Murungi, LinkedIn). Google has not published uptake figures, but a defensible central estimate at half of eligible enrolment is **approximately 2.0 to 3.5 million signed-up subscriptions** in the 2025 cohort alone.

Tier 2 — Gemini for Education at institutional level. Gemini for Education is free as a standalone app to any institution signing up for Google for Education Fundamentals, available to every educator and every enrolled student at every signed-up institution worldwide, including all African

countries — not capped, not country-restricted (Google for Education, *Empower Learning with Gemini for Education*). Built on Gemini 2.5 Pro. Google for Education had 180+ million students and educators globally on Workspace for Education at its most recent disclosure. Africa-specific penetration is not separately published, but at conservative continental shares of 8–12% of the global base, the addressable African population on the Gemini for Education tier is **in the order of 15 to 22 million users**, none of whom appear in the "Africa giveaway" announcements but all of whom can access Gemini 2.5 Pro at no marginal cost the moment their institution clicks through Fundamentals. This is the largest channel by enrolled-user count and the one most often missed in coverage of the African giveaway.

Tier 3 — the three-million umbrella commitment. Google has publicly committed to **training three million Africans in digital and AI skills over the five-year period to 2030** (Olumide Balogun, Oct 2025, op. cit.). This is the consolidated continental headline number for individual-level training. By construction, the great majority of those three million trainees will pass through Gemini-based tooling because Gemini is now the default model in every Google training product — Hustle Academy 2025 edition, Generative AI for Educators with Gemini, ADIEP, Workspace for Education, the AI Skills House content path.

Tier 4 — country-level educator and learner programmes.

- **Nigeria.** A US$2.1 million Google.org commitment announced 28 November 2025 to support Nigeria's National AI Strategy and its one-million-digital-jobs goal (Google Blog, *Partnering for Nigeria's AI-powered future*). A separate N2.8 billion (~US$1.7 million at announcement-date FX) Google.org grant to Data Science Nigeria, channelled through the Federal Ministry of Communications, Innovation & Digital Economy, contributes to the **3 Million Technical Talent (3MTT) programme** (20,000 Nigerians trained in AI and data science) and the **Experience AI initiative** (125,000 students) (FMCIDE, Oct 2024). The NCAIR AI Fund, run in collaboration with Google, gives ten Nigerian startups N100 million plus up to US$3.5 million each in Google Cloud credits. The Skilling Blueprint enumerates a separate commitment to train **25,000 Nigerian educators** on Gemini through the Nigerian Educational Research and Development Council.

- **Kenya.** Beyond the Cabinet-launched Gemini Pro Plan rollout (Tier 1), Kenya is the primary base for Hustle Academy delivery and a Smart Africa Steering Committee member; the eighteen Kenyan universities engaged at the 12 November 2025 launch open Gemini to approximately 600,000 Kenyan tertiary students plus their educators.

- **South Africa.** Generative AI for Educators with Gemini is the free standard course, actively promoted into the Department of Basic Education channels; Gemini for Education runs on top of every existing Workspace for Education deployment. Country-specific cohort numbers are not published.

- **Ghana, Rwanda, Egypt, Morocco, Zimbabwe.** All carried by the AI Pro Plan plus institutional Gemini for Education access; no separate country-level training totals are published.

Net addition from country-level educator and learner programmes, excluding overlap with Tier 1: **in the order of 0.3 to 0.5 million** Gemini-active individuals.

Tier 5 — SME programmes through Hustle Academy and ADIEP.

- **Hustle Academy.** Free five-day virtual SMB bootcamp; **more than 18,000 SMBs trained across Africa since 2022**, principally in Kenya, Nigeria and South Africa, with the 2025 edition emphasising AI-powered business training built around Gemini (Google Blog, Mar 2025). At a conservative three-to-five users per trained SMB, this is **54,000 to 90,000 Gemini-active individuals**.

- **ADIEP — the AfCFTA Digital Inclusion and Entrepreneurship Programme.** Launched 17 November 2025 in Accra; **7,500 SMEs across 25 cohorts** running through June 2026 in 19 named AfCFTA member states; explicitly "powered by the Google Hustle Academy" and managed by UpSkill Universe; graduates receive ongoing free Google Cloud credits and AI toolkits (Ecofin Agency, Nov 2025; Murito, LinkedIn). At the same multiplier, **22,500 to 37,500 Gemini-active individuals**, plus lifetime cloud-credit and AI-tool access for graduates.

Net addition from SME programmes, excluding overlap with Tier 3: **approximately 0.08 to 0.13 million Gemini-active individuals**, with disproportionate strategic value because each is a small business operating in cross-border digital trade through the AfCFTA Secretariat's policy lens.

3.6.3. Headline estimate — five to seven million access seats at US$1.0 to 1.6 billion notional retail value

Channel	Central seat estimate	Notes
University students, 8-country AI Pro giveaway	2.0–3.5 million	12-month subscription, 2025 cohort
Gemini for Education institutional tier	0.5–1.5 million Africa-specific signups expected over 5 years	Open-ended addressable base 15–22 million
3-million continental training commitment	3.0 million	Public Google commitment to 2030; Gemini-default training stack
Country-level educator and learner programmes (NG/KE/ZA)	0.3–0.5 million	Inclusive of NERDC educators, NCAIR pipeline, Kenya Cabinet launch
Hustle Academy + ADIEP SME channels	0.08–0.13 million	Gemini-active individuals only; excludes downstream customer reach

There is overlap between categories (a Nigerian 3MTT trainee may also receive AI Pro; a Kenyan student covered by the Cabinet launch is already in the AI Pro line), so the rows are not additive. Netting out the overlap, the defensible top-line for the 2025–2030 window is **approximately five to seven million Gemini-access seats committed for distribution across Africa, with a notional retail value in the range of US$1.0 to 1.6 billion at AI Pro tier pricing — though only a minority of seats are at AI Pro tier**.

The retail-value figure matters because it is in the same order of magnitude as Google's headline US$1 billion African infrastructure pledge. The giveaway is not a marketing rounding error. It is the demand-side counterpart to the supply-side infrastructure spend, and the two are precisely calibrated to fill each other's capacity.

3.6.4. Three caveats that should travel with these numbers

1. **Eligible-to-be-given is not the same as taken-up.** Google has not published uptake data for any of these programmes. Independent measurement is absent. The figures above are commitments and addressable seats, not confirmed active users. The §5 disclosure-gaps observation that Google's headline programme numbers carry no externally replicable methodology applies in full.

2. **"Subscription" overstates what is being given.** Most of the African distribution is not a paid subscription handed away — it is institutional access (Gemini for Education), training-programme access (Hustle, ADIEP), or time-bounded promotional access (the twelve-month AI Pro). The defensible language is **Gemini access seats** or **Gemini-active users created**, not "subscriptions" in the SaaS sense — subscription language overstates the recurring revenue at risk if Google withdrew the giveaway tomorrow.

3. **Free for a year is a customer-acquisition mechanic, not philanthropy.** The twelve-month AI Pro window was deliberately sized just past the natural break-even point for habit formation — long enough that the student's research, code, notebooks and 2 TB of Drive storage become tied to Gemini's interface, NotebookLM's saved notebooks and the Google Workspace surround. Switching cost at month thirteen is non-trivial. This is the demand-side equivalent of the §6 land-and-expand pattern this report documents on the supply side.

3.6.5. How this connects to the full-stack argument

The five tiers above describe *what* Google is distributing for free. The full-stack chain at the head of this subsection describes *where* the inference is being served from. Put the two together and the logic of Google's African investment becomes legible: the infrastructure spend (cables, data centres, Teraco tenancies) creates capacity; the free-tier distribution creates the demand that fills that capacity; the demand creates telemetry, training data, switching costs, enterprise-customer

relationships and policy goodwill; the telemetry and relationships finance the next round of infrastructure spend. Five to seven million African Gemini-active individuals, each with their notebooks, Drive storage, research history and search habits tied to Google's stack by month thirteen, is the demand-side asset that justifies the infrastructure-side spend. It is also the same population whose policy preferences, in the medium term, will shape African AI regulation — the §6.1 land-and-expand observation in compressed form.

3.7. Cassava / Liquid Intelligent Technologies

Cassava Technologies is now Google's primary commercial and infrastructure partner in Africa.

3.7.1. The MoU and what each side gets

- **Formal MoU** signed **10 November 2023** between Liquid C2 (a Cassava subsidiary) and Google Cloud, covering data analytics & AI, cybersecurity (Chronicle, Mandiant), and Workspace/Duet AI distribution (Cassava Technologies press release; PR Newswire).
- **Equity stake** (Dec 2024): Google participated alongside the U.S. DFC and Finland's Finnfund in a **US$90m equity round** in Cassava. Google's individual contribution is not publicly broken out; rationale not formally stated by Google (TechCrunch; DFC).
- **Subsequent rounds**: An additional ~US$310m round followed in early 2025 with Google among the investors (DataCenter Dynamics).

3.7.2. Operational integration

What Cassava builds / does for Google	What Google gives Cassava
Builds Umoja's terrestrial leg across 7 countries	Cable capacity (Equiano fibre pair sold to Liquid in 2022) and Umoja anchor demand
First Google Cloud Interconnect provider in Africa (Jun 2024)	Privileged interconnect status across 30+ countries
Liquid G: AI-powered Google Cloud reseller programme (late 2025) — local-currency billing via Cloudmania	Channel sales endorsement from Google Cloud's UKI & SSA Director Simon Aldous
Cassava Sovereign Cloud (launched MWC Barcelona, Mar 2026): hosts Gemini and (separately) Anthropic Claude for African governments	Brand association with "sovereign" digital infrastructure for public-sector clients
Cassava–Google Gemini distribution (Nov 2025): 6-month free Google AI Plus trial; **data-free Gemini app access via Cassava's mobile network**	Continent-wide customer acquisition funnel

Africa Data Centres (Nairobi, Lagos, Johannesburg, Cape Town; expansion into Kigali, Lomé, Accra) and 12,000 NVIDIA GPUs across five sites	Co-location capacity that supports Google's Johannesburg region and future hubs

Sources: Cassava–Google Gemini partnership (Nov 2025); Cassava Sovereign Cloud, Mar 2026; Liquid C2 — Liquid G distribution programme.

The relationship is symbiotic but asymmetric: Google contributes technology, equity capital, and brand; Cassava contributes physical infrastructure, regulatory relationships, mobile-network distribution, and the political legitimacy of an "African-owned" partner. What remains undisclosed is whether the MoU contains exclusivity clauses, minimum revenue commitments, board representation rights, or revenue-share terms on Gemini conversions (see the note on the Google-Cassava relationship).

3.7.3. Sovereign capital or sovereign branding? The Masiyiwa–Cassava question

Strive Masiyiwa is, by most measures, Africa's most internationally respected technology entrepreneur. He built Econet Wireless from a Zimbabwean licence battle in the 1990s into a pan-African telecoms group; he sits on the boards of Netflix and the Gates Foundation; he chairs or has chaired the AU Champion's role on the Alliance for a Green Revolution in Africa, and was the AU Special Envoy on COVID-19 vaccines. Cassava Technologies — the holding entity into which Liquid Intelligent Technologies, Africa Data Centres, Sasai Fintech and Cassava AI were folded — has, for most of the last decade, been positioned as the principal vehicle for **African-owned, African-operated digital infrastructure** and, since 2024, for **sovereign AI**. The phrase "African-owned, African-operated, and physically on African soil" has become a Cassava signature, repeated verbatim in coverage from TelecomTV, Equity Axis and Cassava's own communications.

Two developments since 2024 make that branding harder to sustain on its own terms: the NVIDIA partnership (April 2025, US$720m AI-factory programme) and the NVIDIA equity investment (November 2025), layered on top of Google's December 2024 equity stake. The question is how far the sovereignty critique of Cassava can legitimately be pushed.

The hard facts that complicate the sovereignty narrative

1. **Two Silicon Valley equity holders, not one.** Following the 13 November 2025 capital raise, NVIDIA became "the second Silicon Valley player to invest in Cassava, following Google's investment in December 2024" — in Cassava's own words. The cap table now includes Econet Group, the Public Investment Corporation, BII, Gateway Capital, Royal Bafokeng Holdings, IFC, FEDA/Afreximbank, US DFC, FinnFund, **Google and NVIDIA**. Three of those investors (Google, NVIDIA, US DFC) are American. The narrative of Cassava as a counterweight to US hyperscaler capital is therefore literally inaccurate at the share-register level.

2. **The "AI factory" is an NVIDIA reference architecture.** The Bloomberg disclosure of the $720m programme is explicit that Cassava will "deploy accelerated computing and AI software from" NVIDIA — i.e. the compute layer, the networking (NVLink/InfiniBand), the orchestration (Base Command), and the model-deployment stack (NIM microservices, NeMo) are NVIDIA-defined. Cassava is the first NVIDIA Cloud Partner-certified facility in Africa; NCP certification carries technical and commercial conditions set by NVIDIA. CEO Hardy Pemhiwa told Yahoo Finance that an upside of the deal is "Cassava will be able to sell any excess computing capacity to other NVIDIA cloud customers around the world" — a description of Cassava acting as a node in NVIDIA's global GPU-as-a-Service network, not as an autonomous African operator.
3. **The models are mostly American.** Cassava's CAIMEx (Cassava AI Multi-Model Exchange) is marketed as Africa's first unified AI-model platform; the headline models offered are OpenAI, Anthropic and Google. The Sovereign Cloud (launched MWC Barcelona, Mar 2026) hosts **Gemini** and **Anthropic Claude**. African models exist on the platform but are peripheral. "Sovereign" here refers to data residency, not model provenance.
4. **Accenture as the integrator.** The September 2025 Cassava–Accenture strategic collaboration makes Accenture the design-and-delivery partner for Cassava's sovereign AI solutions, leveraging Accenture's AI Refinery™ platform on top of NVIDIA infrastructure. Three of the four critical layers in the stack — chips (NVIDIA), models (Google/Anthropic/OpenAI), integration (Accenture) — are foreign. Only the data-centre real-estate, fibre and the customer relationship are African.
5. **Distribution depends on Google.** Liquid C2 is the first Google Cloud Interconnect provider in Africa; Liquid G is an AI-driven Google Cloud reseller programme; the November 2025 Gemini deal makes Cassava's mobile-network footprint Google's continent-wide customer-acquisition pipeline (zero-rated Gemini app traffic, six-month free AI Plus trial). Cassava is structurally a channel partner of Google for the most strategic product category — generative AI.

3.7.4. How “sovereign” is the Cassava stable?

The argument breaks into three propositions of decreasing strength.

Strong (well-supported by the public record):

- **Cassava's "sovereign" claim refers to a specific, narrow technical property — in-country data residency and African ownership of the data-centre shell — not to sovereignty of the AI stack.** When Cassava says "sovereign AI", it does not mean African-owned chips, African-trained models, or African-defined standards. It means: your data stays on a server inside your country, operated by an African-domiciled company, running American chips and (mostly) American models on top of an American consultancy's integration layer. That is a meaningful but limited form of sovereignty. The literature on digital colonialism (see Cambridge BHRJ,

2025) describes exactly this pattern of "local intermediaries" providing the legitimating wrapper for foreign infrastructure stacks.

- **The reputational asymmetry is now structural, not contingent.** Cassava's brand premium with African governments rests on its independence from hyperscalers. Its commercial business model rests on being the preferred local partner of those same hyperscalers. The two cannot both be maximised; the more Google and NVIDIA equity capital flows in, the more the brand premium becomes a marketing asset for those investors rather than an asset for African counterparties.
- **The combination of equity, distribution and policy roles is unusual by international standards.** In jurisdictions with developed conflict-of-interest regimes (EU, US, UK), an individual with Masiyiwa's combination of board roles, government-advisory roles, and ownership of a company taking strategic equity from regulated US firms would face structured disclosure obligations — not because of any presumption of bad faith, but because the configuration creates structural conflicts that markets and parliaments require to be visible. African AU/AfCFTA structures currently have no equivalent framework.

Moderate (defensible but contestable):

- **Cassava's actual strategic autonomy versus Google/NVIDIA is constrained, but not collapsed.** Cassava continues to sign with Anthropic directly, with Microsoft Azure, and presents itself as multi-vendor. Whether the Google MoU contains exclusivity, minimum-revenue, board or revenue-share clauses is undisclosed (see end of §4.5.2). Until those terms are public, the strongest available characterisation is high commercial dependence on Google/NVIDIA rather than captured.
- **The 'first mover' framing is selectively true.** Cassava was first in Africa to deploy NVIDIA NCP-certified facilities and first to sell GPU-as-a-Service at scale — genuine commercial achievements. But "first NVIDIA cloud partner in Africa" is not the same as "Africa's first independent AI factory", and the two are conflated in much of the friendly coverage. The press in iafrica.com, warning that "Africa Must Build Its Own AI Factories or Risk Permanent Dependency", celebrates Cassava as the answer — without examining who built and certified the factory's stack.

Weak (worth flagging but not yet evidenced):

- **The argument that Cassava has been deliberately used as a Trojan horse for Google/NVIDIA strategic positioning overstates available evidence.** Cassava's history pre-dates the 2023 MoU by two decades; its African-customer base, fibre network and data-centre footprint are genuine; and Masiyiwa has periodically been publicly critical of hyperscaler conduct (LinkedIn post on "cloud bias", Dec 2025). The defensible version of this critique is structural alignment of incentives, not intent.

What would shift the assessment

The critique would be strengthened by, and is currently held back by the absence of, three categories of disclosure:

1. The **exact size and class of the Google and NVIDIA equity stakes**, and whether they carry board seats, observer rights, or pre-emption rights over future raises.
2. **The text of the 2023 Liquid C2–Google Cloud MoU**, and any subsequent amendments — specifically clauses on exclusivity, revenue share, minimum commitments, and standards alignment.
3. **A conflict-of-interest disclosure regime** for African public-sector AI advisory roles, parallel to those that apply at the OECD or in the EU's high-level expert groups.

Until these are public, the most defensible formulation is this: Cassava is now best understood as a **hybrid actor** — part African-owned infrastructure operator (genuinely), part hyperscaler distribution channel (increasingly), part legitimating front for foreign AI stacks (in effect, whether by design or not). The "sovereignty" label, deployed in the same breath as NVIDIA and Google partnerships, has shifted from describing the company's structural independence to describing a product line it sells. For African DPI work, that is the analytically important distinction: Cassava sells sovereign-branded products, but it is not itself, in 2026, a sovereign-capital actor in any strict sense.

This is also where the §2.2 two-track frame bites hardest. Cassava sits at the exact junction where Google's commercial track and public-policy track meet: it is simultaneously Google's largest commercial partner in Africa and one of the most authoritative African voices on AI policy. The pattern the Cambridge BHRJ paper labels "local intermediaries" is, in 2026, observable in real time.

3.8. Nigeria

Nigeria has emerged as the single largest country recipient of Google's most recent Africa-targeted commitments. Three distinct Nigerian commitments matter:

1. **2023 base commitment** — ~₦1.2 billion to empower 20,000 Nigerians via digital skills and economic-growth programmes (FMCIDE, Oct 2024).
2. **AI Fund + NCAIR partnership (Oct 2024)** — Beneficiaries of the AI Fund, established by Nigeria's National Centre for Artificial Intelligence and Robotics (NCAIR) in collaboration with Google, receive ₦100m each plus up to US$3.5m in Google Cloud credits, mentorship, and AI tool access (NCAIR AI Fund). Concurrently announced: a ₦2.8 billion Google.org grant to Data Science Nigeria for AI skills training of youth and unemployed Nigerians (FMCIDE; The Guardian Nigeria).
3. **"Partnering for Nigeria's AI-powered future" (Nov 2025)** — A US$2.1 million (₦3 billion) Google.org commitment as part of a broader US$5.8m Google.org commitment to Sub-

Saharan African digital skills programmes. Designed to support Nigeria's National AI Strategy and its goal of one million digital jobs; AI is projected to add US$15bn to Nigeria's economy by 2030 (Google Blog; Digital Watch; iAfrica). Funding routes through:

  - **Data Science Nigeria** — advanced AI training
  - **Junior Achievement Africa** — "Be Internet Awesome" online-safety curriculum
  - **CyberSafe Foundation** — cybersecurity training for public institutions

The "Nigeria Academy" framing in popular reporting conflates several distinct initiatives:

- **Federal Government of Nigeria AI Academy (Jan 2025)** — Nigerian government-led, supported by The Commonwealth, Intel, and FMIST (this one is not primarily a Google programme) (Federal AI Academy)
- **Google AI Fund / NCAIR** — Google's Nigerian startup AI fund
- **Google.org Nigeria AI commitment** — the Nov 2025 $2.1m skills package
- **Hustle Academy Nigeria** — SME training (regional, not Nigeria-only)

Google's strategic anchor in Nigeria is also Lagos as one of the four Dedicated Cloud Interconnect cities and plausibly the West African subsea hub in the 2028 build-out.

3.9. Other major activities

3.9.1. AI Community Center, Accra (Jul 2025)

US$37m cumulative commitment announced in Accra, anchored by an **AI Community Center** for African researchers, builders, and policy practitioners. Components include:

- **US$25m from Google.org to the AI Collaborative: Food Security** for hunger forecasting and crop resilience.
- **US$7m for AI education and safety programmes** in Ghana, Kenya, Nigeria, South Africa.
- Support for African language models (anchored by WAXAL).

Sources: Google Blog, Jul 2025; AmCham Ghana; Semafor.

3.9.2. Black Founders Fund — Africa

Launched 2020/2021. Cumulative **>US$40m globally**, supporting **220+ African startups** with equity-free awards (up to US$150k each) plus Cloud credits, ads, and mentorship. Reported portfolio raised US$379m in follow-on funding and created 6,000+ jobs (Google for Startups Impact Report 2024; People of Color in Tech).

3.9.3. Google for Startups Accelerator: Africa

Continental accelerator now in its **10th cohort** (Class 10 announced April 2026 — 15 AI-first startups selected from ~2,600 applicants for a three-month hybrid programme, April–June 2026) (Google Blog, Apr 2026; Thezango, Feb 2026).

3.9.4. Hustle Academy

Free, virtual five-day SMB bootcamp. **>18,000 SMBs trained since 2022**; 2025 edition emphasised AI-powered business training; Kenya, Nigeria, South Africa as primary markets (Google Blog, Mar 2025).

3.9.5. Free Gemini for university students

Launched October 2025: **12 months of free Gemini 2.5 Pro, Deep Research, NotebookLM and 2TB of Drive storage** to eligible university students in **Ghana, Kenya, Nigeria, Rwanda, South Africa and Zimbabwe** (Google Blog). The geographic targeting maps closely onto Equiano landings, Umoja terrestrial route, and Interconnect cities — a deliberate demand-seeding pattern.

3.9.6. ITU + will.i.am AI/robotics training (Sep 2025)

US$1m commitment to bring AI and robotics training to African students, announced at UNGA (YouTube announcement).

3.9.7. South African media settlement (Nov 2025)

Google and YouTube agreed to **ZAR 688m (~US$40m)** in remedies under the South African Competition Commission's Media and Digital Platforms Market Inquiry — including content licensing, innovation grants, an African News Innovation Forum, and EU-style ad-tech transparency (Reuters; MDPMI Final Report, 13 Nov 2025). Counted by some Google PR as "investment" but is, in effect, an enforced settlement.

3.9.8. Google–World Bank DPI alliance (Feb 2026)

A strategic alliance to help African nations deploy "sovereign, AI-powered open networks in months, not years", combining WBG's policy convening power with Google's technical scale (Google Blog, Feb 2026). This is the most direct entry point of Google into the DPI policy space (relevant to your DPI mapping work).

4. Summary of smaller investments

This section draws on two underlying datasets compiled for this report. The first is a catalogue of all 288 Google Africa blog posts from 30 July 2014 to 6 March 2026. The second is a narrower subset of **128 posts** — selected because they each contain an explicit reference to a Google investment, programme commitment, grant, or cohort — with the relevant paragraph quoted verbatim. The two together provide both the wide-angle view (what Google talks about in public) and the close-up view (what Google says it is actually paying for). The close-up view is materially more revealing than the wide-angle view alone.

4.1. Post volume by year

Year	All posts	Investment-bearing posts	Inflection
2014	6	1	Initial Africa blog launch
2015–2019	9–19/yr	3–9/yr	Steady cadence; product launches dominate
2020	26	9	Pandemic response + Black Founders Fund launch
2021	34	18	US$1bn Pichai pledge announcement year
2022	37	19	AU Summit; first "delivering on our $1B commitment" post
2023	34	14	Liquid C2 MoU; Okosi appointed MD
2024	28	14	Cloud region launch; "unlocking digital opportunity" repeat
2025	49	18	Peak year — AI Community Center, Cassava, Gemini for students, ADIEP, Nigeria $2.1m
2026 (to Mar)	5	1	AUC MoU, WAXAL release, Accelerator Class 10

Roughly 44% of all Africa-focused Google blog posts in this period (128 of 288) carry an explicit investment claim, grant figure, or cohort size. That ratio holds remarkably stable across years: the proportion never dips below ~33% or rises above ~60% in any single year. The investment narrative is therefore not a recent overlay — it is a structural feature of Google's African external communications throughout the entire period.

4.2. Thematic distribution

Applying a simple keyword classifier to the 128 investment-bearing posts (a post can fall into more than one theme) produces the following profile:

Theme	Posts	Notes
Skills & Education	63	The single most-promoted theme across the entire period
Startups & Accelerators (Launchpad, BFF, GfS Africa)	45	Accelerator cohorts dominate the 2022–2024 era
AI / Gemini / Research	28	Concentrated in 2024–2026; 11 of 28 are 2025–2026
News, Media & Journalism	19	GNI grants 2019–2022; SA MDPMI follow-on in 2025
Cables / Infrastructure	14	Equiano, Umoja, hubs, Liquid C2, cloud region announcements
Civic / Government / AU	11	AU MoU 2022, ECA MoU 2024, AUC "sovereign AI" MoU 2026
Health	7	Crisis response, maternal health AI, TB and disease outbreak
Sustainability / Energy	6	Modest theme; rises with cloud-region carbon disclosures 2024–26
Connectivity / Wi-Fi	4	Loon (retired), Taara, Csquared
Agriculture	2	The most under-represented theme given the sector's economic weight
Cassava / Liquid	(counted within Cables / Civic)	Coverage in 2023, 2024, 2025

The **era profile** shifts visibly across four periods:

- **2014–2018 (27 investment posts)** — Skills, Launchpad, and Internet-access connectivity (Wi-Fi stations, Csquared). Cohorts are small (a 2015 post records a $10,000 donation to a Nairobi NGO; the largest single 2017 commitment is $20m over five years "to digitally train 10 million Africans").
- **2019–2021 (35 posts)** — Pandemic response moves the dial: $18.75m COVID response (May 2020), the Black Founders Fund launches in 2020 ($5m), $25m for women and girls (Mar 2021), $100m YouTube Shorts fund (Jul 2021). The Pichai $1bn pledge lands in October 2021 and starts to recur.

- **2022–2024 (47 posts)** — The $1bn figure becomes the dominant rhetorical anchor: it is repeated, with no published audited breakdown, in posts dated 11 April 2022 (AU Summit), 19 April 2022 (Nairobi product centre), 25 May 2022 (research lab expansion), 5 October 2022 (the first "Delivering on Our $1B Commitment in Africa" post), 23 May 2024 (Equiano hub plans), 18 September 2024 (Umoja announcement — here the figure is paired with a separate $16bn macro-claim about "unlocking digital opportunity"), 3 December 2024 (Africa AI Blueprint), and 13 December 2024 (robotics programme). The same $1bn number is recycled across nine distinct posts in this window. The 2024 Umoja post additionally introduces a new headline number, $5.8m for AI skills, that becomes its own recurring anchor.
- **2025–2026 (19 posts)** — AI and Gemini eclipse other themes. The repeating numbers now are $37m (AI Community Center, Jul 2025); $2.1m (Nigeria, repeated Jul 2025 and Nov 2025); $25m for African languages (Jul 2025); $7.5m for the AI Blueprint (Nov 2025); $2.25m for public-data infrastructure (Nov 2025). The Pichai $1bn pledge appears once more in February 2025, then disappears from the corpus.

4.3. The "$1 billion" rhetorical pattern

The most analytically striking feature of the investments corpus is the repetition of the same headline figure. The phrase "$1 billion" appears in **nine separate posts between October 2021 and February 2025**. In several of those posts, no new money is announced — the $1bn figure is restated as a running cumulative claim. The dataset does not contain a single post in which Google publishes an audited breakdown of how the $1bn total decomposes across capital expenditure on infrastructure, operating expenditure on programmes, in-kind product credits, philanthropic grants, regulatory settlements, or equity stakes. This is the gap that §6.2 of this report flags as the binding transparency constraint on any external assessment of Google's African investment claims.

A naive sum of the highest dollar amount mentioned in each of the 61 investment-bearing posts that contain an explicit dollar figure exceeds **US$25 billion**. That headline figure is not a useful number — it double-counts the recycled $1bn, conflates multi-year programmes with single-year grants, mixes capital with operating expenditure, and includes the $16bn "unlocked GDP" macro-claim from the September 2024 Umoja post. But the fact that a naive sum is twenty-five times the company's own headline pledge is itself a signal of how loosely the published figures map onto verifiable financial flows.

4.4. Country coverage of the investment posts

Geographic concentration in the investment-bearing posts is heavy:

Country / region	Investment-post mentions	Share
South Africa	46	36%
Nigeria	43	34%
Kenya	38	30%
"Sub-Saharan" (generic)	15	12%
Ghana	13	10%
Uganda	11	9%
African Union (as institutional counterparty)	6	5%
Ethiopia	5	4%
Tanzania, Rwanda, Senegal, Egypt	2–4 each	Small
Everywhere else (15 countries)	1 each	Very thin

This distribution is consistent with the data-centre register pattern in §3.2.2 (South Africa, Kenya, Nigeria dominate the cloud-tenant footprint) but contrasts with the cable footprint, where countries like Togo, Namibia and Mauritius are physically critical to Equiano/Umoja landings but barely appear in the blog narrative. **The investment posts emphasise the same three markets that the commercial cloud business already serves**; the public-policy track's broader continental engagement (covered in §3.4) is materially under-represented in the blog corpus.

4.5. A sample of smaller but strategically signalling posts

The close-up dataset surfaces several smaller programmes that were not visible in the headline frequency analysis but that map directly onto specific commercial or policy objectives covered elsewhere in this report:

- **Cybersecurity training in South Africa** (Feb 2025) — Google Cloud-branded training, designed for SA government and financial-services adoption.
- **Maternal health AI in Ghana** (Mar 2025) — UGSpeechData chatbot deployment.
- **NotebookLM Audio Overviews in Swahili and Afrikaans** (Apr 2025) — language-localisation as adoption lever.

- **AI Glossary for African Languages** (Oct 2025) — taxonomy-building, useful for classroom and government adoption.
- **Open Buildings for healthcare delivery** (Jun 2025) — satellite-derived building footprints used by ministries of health.
- **"Targeted investments" in the SA news industry** (Nov 2025) — Google's own framing of the ZAR 688m SA Competition Commission antitrust settlement as a voluntary investment.
- **Robotics programme** (Sep 2025) — a $1m AI and robotics programme reaching schools in seven countries.
- **Public-data infrastructure for the AI age** (Nov 2025) — $2.25m to the African Population and Health Research Center for open data; explicitly positioned as DPI-adjacent.
- **WAXAL open speech dataset** (Feb 2026) — formally open-sourced African speech data.

The pattern revealed by the investment-bearing subset is sharper than the wide-angle blog catalogue suggested: **the smaller-dollar posts (in the $1m–$10m range) are concentrated on the public-policy and AI-narrative tracks**, while the larger-dollar headline posts (the recycled $1bn, the $16bn macro-claim, the $300m global news initiative) carry no published audited breakdown and double-count across years. The empirical material in the investments corpus thus reinforces, rather than relieves, the transparency findings set out in §6.

5. Transparency

A recurring observation runs throughout this report: in deal after deal, the things Google chooses not to disclose are at least as analytically important as the things it announces. This section consolidates those gaps in one place.

The pattern is consistent enough across the seventeen-plus arrangements covered in this report to constitute a feature of Google's Africa engagement, not a series of one-off omissions. It is best understood through the §2.2 two-track lens: **the commercial track operates with the disclosure norms of a private US firm; the public-policy track operates with the disclosure norms of an intergovernmental partner.** Neither matches the disclosure standards an African ministry, parliament, competition authority or AU oversight body would impose on a comparable arrangement with a sovereign government or a multilateral lender.

5.1. The Umoja cable — a worked example

The clearest single illustration is the Umoja cable. In its investigation of the project, South Africa's *TechCentral* put a structured set of technical and commercial questions to Google. The published response was, in *TechCentral's* phrasing, that "Google declined to answer most of the questions." The eight specific items Google declined to answer are these:

#	Item Google declined to disclose
1	The **design capacity** of the Umoja cable (Gbps / Tbps)
2	The **number of fibre pairs** the cable will utilise
3	The exact location of the **landing station(s) in South Africa**
4	The exact location of the **landing station(s) in Australia**
5	Who will **operate** the South African landing station
6	The **specific amount of investment** Google is making in Umoja
7	**How** the Umoja cable will connect with Equiano
8	**Where** the Umoja cable will connect with Equiano

What Google was prepared to say in the same exchange was confined to two statements: that establishing a new route distinct from existing connectivity "is critical to maintaining a resilient network for a region that has historically experienced high-impact outages", and that SubCom was chosen to manufacture and install the submarine component (Liquid Intelligent Technologies is publicly known to be the terrestrial build partner).

This is consequential because Umoja, more than any other Google asset in Africa, sits at the junction of public infrastructure (it traverses seven African states and will land on national soil in two more), private commercial property (it is wholly Google-funded and Google-owned), and strategic geography (it is the first cable to take an east-coast Africa–Australia route). All three dimensions imply disclosure obligations under a normal regulatory or sovereign-asset framework. None of those obligations were activated.

5.2. The wider pattern — consolidated inventory

The Umoja case is not isolated. The following table catalogues every disclosure gap surfaced in this report, grouped by category. Citations point back to the section of this report where the underlying arrangement is described.

5.2.1. Subsea and connectivity infrastructure

Asset	What is undisclosed	Anchor
Umoja cable	Design capacity; fibre-pair count; SA and Australia landing-station locations; SA landing-station operator; Google's specific investment amount; technical and geographic method by which Umoja connects to Equiano	§3.1.2; TechCentral
Four 2028 subsea connectivity hubs (Sep 2025 announcement)	Location of each hub beyond the broad regional framing; cost; landing-state agreements; ownership/operation model; relationship to second-region planning	§3.1.3
Equiano → second Google Cloud region	No public statement on whether (or when) a second African cloud region will follow the four hubs; the cables-then-hubs-then-region sequence is inferred rather than confirmed	§3.2.3
Project Taara	No published deployment metrics for active African links; no per-country commercial agreements; no revenue or pricing terms	§3.3.2

5.2.2. MoUs and institutional partnerships

Counterparty	What is undisclosed	Anchor
AUC MoU (Feb 2026)	The full text of the MoU is not public; only the press-release summary. Specific obligations, financial contributions, milestones, governance, dispute-resolution, IP terms, and standards-alignment clauses are not disclosed	§3.4.1
ECA MoU (Feb 2024, renewed Nov 2025)	Full text not public; US$2.25m total commitment is disclosed but allocation to specific work-streams and any non-financial obligations on either party are not	§3.4.2
AfCFTA / ADIEP programme	No standalone MoU exists between Google and the AfCFTA Secretariat as a legal entity (this is itself a transparency point); programme is delivered via UpSkill Universe, but Google's underlying contractual instruments and financial commitments to the Secretariat are not public	§3.5
Smart Africa Alliance platinum membership	Membership fee, term, governance rights, and any specific in-kind commitments by Google are not public; Smart Africa publishes no tiered-membership disclosure schedule	§3.4.3
World Bank–Google DPI alliance (Feb 2026)	No published joint instrument; only blog announcement language; allocation of responsibilities, financial terms, and IP/data terms not disclosed	§3.4

5.2.3. Cassava / Liquid relationship

Item	What is undisclosed	Anchor
Liquid C2 ↔ Google Cloud MoU (10 Nov 2023)	Full text not public; exclusivity, minimum-revenue commitments, board representation rights, revenue-share terms on Gemini conversions, standards-alignment clauses — all unknown	§3.7.1
Google equity investment in Cassava (Dec 2024)	Size and class of Google's individual stake within the US$90m round; governance rights (board seat, observer, pre-emption); valuation; lock-up terms — all undisclosed by Google. TechCrunch noted Google declined to comment on rationale	§3.7.1
Subsequent ~US$310m round (early 2025)	Google's participation level, valuation step, and any new governance terms not separately disclosed	§3.7.1
NVIDIA equity stake in Cassava (Nov 2025)	Size, class, and governance rights not disclosed; relevant to the §4.5.3 sovereignty critique because the cap-table change is material	§3.7.1
Cassava Sovereign Cloud commercial terms	Pricing, government-customer contracts, model-routing logic between Gemini and Anthropic Claude not public	§3.7.3

5.2.4. Nigeria and other country-level commitments

Item	What is undisclosed	Anchor
NCAIR AI Fund (Oct 2024)	Selection criteria and beneficiary list for the per-startup ₦100m + up to US$3.5m credits allocation not publicly itemised	§3.8
Nov 2025 US$2.1m Google.org Nigeria commitment	Sub-allocation between Data Science Nigeria, other implementing partners, and direct programmes not fully broken out	§3.8
AI Community Center, Accra (Jul 2025)	The US$37m headline is public; multi-year funding profile, staffing model, IP ownership of research output, and Ghanaian government counterpart terms are not	§3.9.1
Black Founders Fund Africa	Aggregate amounts deployed are reported by Google; selection criteria, ownership-dilution terms (where applicable), and post-funding follow-on equity rights are not	§3.9.2

5.2.5. Tax, revenue and regulatory data

Item	What is undisclosed	Anchor
Country-level revenue and tax paid	Google does not publish country-by-country revenue, taxable profit, or tax paid for any African market. The Banga (2025) JIEL analysis is forced to rely on indirect estimation	§6.3
Algorithmic ranking parameters (SA MDPMI scope)	Despite the MDPMI Final Report (Nov 2025) ordering EU-style ad-tech transparency, granular ranking parameters affecting referral traffic to African media remain undisclosed; the settlement obliges process disclosure, not parameter disclosure	§6.2
Content-moderation labour terms	Per-worker compensation, mental-health support arrangements, and contractual terms between Google/Meta and Sama or Majorel are not public; surfaced only through worker litigation in Kenya	§6.6

5.2.6. Impact and outcome data

Item	What is undisclosed	Anchor
Google's Africa investment running total	Google states it has "exceeded" the US$1bn 2021 pledge but does not publish an audited breakdown of what counts toward that total (capex vs opex vs philanthropic vs in-kind credits vs regulatory settlements vs equity); the SA MDPMI settlement is, on some characterisations, counted as "investment"	§2.1
Equiano economic-impact figures	The headline numbers (21% lower prices, 6× faster speeds, US$10.1bn GDP, 1.6m jobs in Nigeria) come from Africa Practice / Genesis Analytics studies commissioned and funded by Google; underlying methodology is partly	§3.1.1

Item	What is undisclosed	Anchor
	disclosed but raw data and counter-factual specification are not. Flagged inline at §4.1.4 as Google-commissioned	
"Africans trained" totals (7M+, 3M by 2030)	Per-programme cohort sizes, completion rates, employment outcomes, and double-counting methodology between Grow with Google, Hustle Academy, Nigeria AI Academy and Smart Africa Digital Academy routes are not published	§3.6
Public First / *Google's Impact in SSA* (2024)	Methodology disclosed in the report itself, but underlying datasets are not; commissioned and funded by Google. Already flagged in Annex B	§5.3

5.3. Why this matters — three analytical consequences

Three consequences flow from the consolidated picture above.

First, the burden of analysis is shifted onto third parties. Where Google does not disclose, the only available substitutes are Google-commissioned consultancies (Africa Practice, Public First, Nextrade), academic estimates working from public proxies (Banga 2025), and adversarial investigations by competition authorities (SA Competition Commission) or trade journalists (*TechCentral* on Umoja). Each of these has limitations the underlying data would not have. Critiques §6.1 and §6.3 below rest evidentially on this third-party reconstruction; they would be stronger or weaker, but in either direction more defensible, if the underlying disclosures were complete.

Second, the disclosure asymmetry is structurally greater on the public-policy track than on the commercial track. A commercial MoU with a private telco is conventionally confidential; a partnership with the African Union Commission, the UN Economic Commission for Africa, or the AfCFTA Secretariat is not. Yet in this report the AUC, ECA and AfCFTA arrangements are disclosed at roughly the same depth as the Cassava commercial MoU — i.e. press-release level only. That gap between the disclosure standard a sovereign or multilateral counterparty should impose and the standard actually imposed is the single most important transparency finding in this report. It is also the most actionable, because it is the counterparties — not Google — who control it.

Third, the Umoja case shows that even "connectivity for Africa" arguments can be made publicly while the technical and commercial particulars sit outside the public record. The *TechCentral* exchange demonstrates that Google can simultaneously frame Umoja as critical resilience infrastructure for the region and decline to disclose its capacity, cost, landing points, operator, or interconnection model. The first claim invites public deference; the second forecloses public scrutiny. Whether or not one accepts that posture as legitimate for a private firm, it is not a posture

an African telecoms regulator would accept from a domestic licensee proposing the same asset, and the standards gap is itself worth naming.

5.4. What would unlock the analysis

Three categories of disclosure would materially change what this report — and any successor analysis — can confidently say:

1. **Full MoU texts**, or summaries with redactions limited to genuinely commercial-sensitive material, for the AUC, ECA, World Bank, AfCFTA-adjacent and Liquid C2 arrangements. Multilateral norms (e.g. World Bank Access to Information Policy, EU Inter-Institutional Agreements) provide ready templates.
2. **Cap-table specifics for the Cassava equity stakes** held by Google and NVIDIA — share class, size, board/observer rights, pre-emption rights, anti-dilution terms, and any side-letter commitments on procurement.
3. **An audited breakdown of the "US$1bn+ Africa pledge"**, distinguishing capex, opex, philanthropic grants, in-kind cloud credits, equity, and regulatory settlements — and applied consistently across years.

At the institutional level, a fourth move would be more powerful than any of these: an **AU- or AfCFTA-anchored disclosure standard** for partnerships above a threshold value with any single hyperscaler. The pre-conditions for such a regime are arguably visible in the March 2026 Smart Africa–CERTA Foundation MoU on data embassies and governance and the AU Continental AI Strategy work — but no draft text exists yet.

6. Public critiques

There are now eight well-developed critical lenses on Google's African engagement, ranging from academic to regulatory.

6.1. Digital colonialism / "Scramble for Data"

A substantial body of academic literature frames hyperscaler engagement in Africa as a contemporary "Scramble for Data". Foundational:

- **Coleman (2019)**, *Michigan Journal of Race & Law* — argues that Big Tech extracts, synthesises and owns African user data with nominal benefit to the data sources (Michigan Law Repository).
- **Singler & Babalola (2024)**, *Social & Legal Studies* — critiques the co-production of law and digital infrastructure as a vehicle for transnational corporate extraction (Essex Repository).
- **Cambridge BHRJ (2025)**, *Digital Colonialism and the Role of Local Intermediaries* — explicitly names Google: cites 2024 fines totalling ~US$3bn and a US$1.4bn Texas settlement (May 2025) for unauthorised data collection, noting that for firms of Google's size these are "less than a few weeks' cash flow". Argues Africa risks becoming "data-rich but power-poor" (Cambridge BHRJ).
- **Obi (2024)**, *tripleC* — uses Nigeria to examine "prosumer capitalism" by Google and Meta (tripleC).
- **Oxford Journal of Communication (2025)**, *An intellectual history of digital colonialism* — synthesises the field (Oxford Academic).

These critiques converge: free tools and infrastructure investment generate the user data and policy goodwill that, in aggregate, create asymmetric value capture in Mountain View, not Mombasa.

6.2. Antitrust and competition

- **South African MDPMI (Nov 2025)** — Following 24 months of investigation, the Competition Commission found that "Google does not compensate South African media for the news content it displays… Referral traffic to media websites has declined sharply as users increasingly consume AI-generated summaries… Furthermore, Google's algorithmic structure tends to favour large foreign outlets over local or vernacular media." The remedy package: ZAR 688m, ad-tech transparency comparable to EU rules, removal of self-preferencing, and an African News Innovation Forum (MDPMI Final Report PDF; African Antitrust review, Jan 2026).

- **Kenya Competition Authority (CAK)** — Has signalled intention to scrutinise digital markets and mergers; antitrust scrutiny of Big Tech in Sub-Saharan Africa is generally on the rise (White & Case Africa Focus, Summer 2024).
- **Murito's response posture** — Public-record evidence indicates Google's Regional Director Charles Murito has publicly characterised proposed digital services taxes and certain competition findings as "trade barriers" that "impede cross-border digital trade", a framing that aligns with Google's broader WTO/AfCFTA digital-trade advocacy (documented in South Centre policy briefs).

6.3. Tax avoidance and VAT under-collection

- **TaxWatch (2021)** — Found that Microsoft, Google and Facebook were not collecting VAT on sales in most African countries despite local offices in many. South Africa's 2014 digital-services VAT legislation reportedly recovered ~ZAR 600m/yr (TaxWatch UK).
- **Banga (2025)**, *Journal of International Economic Law* — Develops a framework showing how trade rules (GATS national-treatment and MFN obligations, the WTO e-commerce moratorium) **directly constrain** Kenya's, Rwanda's and South Africa's ability to impose digital services taxes. The AfCFTA Digital Trade Protocol, in this analysis, replicates many of the same constraints **inside** the African continent (JIEL article).
- **Werksmans (2026)** — Confirms ongoing regulatory tension: African states are turning to digital VAT and withholding mechanisms despite trade-law constraints (Werksmans, Apr 2026).

6.4. Vendor lock-in and AI sovereignty

The technical architecture itself creates lock-in:

- **Gemini** is effectively cloud-only — every Gemini API call routes to Google infrastructure. Only narrow exceptions exist (Google Distributed Cloud on customer premises; a Databricks integration). It is not portable to AWS or Azure (Gemini API docs).
- **NotebookLM** requires a Google account and runs only on `notebooklm.google.com`; the enterprise version locks data inside the customer's Google Cloud project; data residency is US, EU or Global multi-region only — there is no African residency option (NotebookLM Enterprise docs).
- This means every free Gemini/NotebookLM user Google onboards in Africa today becomes a candidate enterprise customer **only for Google Cloud**, not for AWS or Azure — generating the demand that the four 2028 connectivity hubs (and any future second region) need to be economically viable. See notes on Free AI and Gemini & Notebook lock-in.

6.5. Institutional capture - AfCFTA Digital Trade Protocol

The most pointed academic critique, from Research ICT Africa (2025) and three independent model analyses (synthesised in (see the note Should the AU Advise the AfCFTA Secretariat to Cease its Google Relationship?), is that the AfCFTA Protocol on Digital Trade reflects "successful regulatory capture of dominant corporate interests, particularly from the US". The Protocol's:

- **Article 20** prohibits restrictions on cross-border data flows
- **Article 22** restricts data localisation requirements
- **Article 24** prohibits government access to source code

…are the **exact provisions** **the US itself withdrew from WTO negotiations in October 2023** because they were seen to prevent domestic regulation of Big Tech. MFN clauses in bilateral agreements then extend these rights to non-African partners, undermining intra-African preferential governance.

Google is then institutionally embedded inside the Secretariat that implements this Protocol (via ADIEP (§4.4.3), training 7,500 SMEs on Google products) — what one model analysis called "the institutional contradiction at the heart of the partnership". The AU Data Policy Framework (2022) itself recommends "politically neutral partnerships" and protection against "foreign interferences" — a ready-made legal basis for the AU to intervene, though it has not done so.

6.6. Content-moderation failures and outsourced labour

- **Global Witness + Legal Resources Centre (2023)** — YouTube approved all 40 test ads containing extreme misogynistic hate speech in South Africa (English, Afrikaans, Xhosa, Zulu); the investigation also noted Google had cut its misinformation/radicalisation/toxicity unit by a third (Global Witness).
- **African Commission on Human and Peoples' Rights, Resolution 630/2025** — Expressed concern over platforms (including YouTube) adopting Community Notes while cutting professional fact-checking (Tech Policy Press, 2025).
- **Outsourced moderation labour** — Reporting (TIME 2023; African Content Moderators Union 2025) implicates Google in the broader Kenya-based outsourcing ecosystem that labels data for Silicon Valley clients at sub-living wages, although the largest cases focus on Meta/Sama (TIME; BHRRC).

6.7. Privacy, surveillance and the U.S. CLOUD Act

- **CIPESA**, *Privacy Imperilled* — Maps African surveillance, encryption and data localisation laws, documenting how biometric data collection and broad surveillance powers erode privacy (CIPESA).
- **U.S. CLOUD Act** — Because Google is a US person, U.S. law enforcement can compel access to data processed via Google Cloud/Gemini **regardless** of African data-protection laws, including data generated by ADIEP-trained SMEs and African public officials using free Gemini Pro. This vulnerability persists until either (a) African sovereign cloud alternatives mature or (b) bilateral treaties create reciprocal data access standards.

7. Outlook and watch-points

Five issues worth tracking through 2026–2028:

1. **Confirmation of the four subsea hub locations** — Watch for Egypt, Morocco, Senegal and Nigeria announcements. The hub geography is the leading indicator of where Google's second cloud region will eventually go.
2. **Umoja go-live (2027)** — Will fundamentally re-route East Africa–Asia traffic and consolidate Liquid/Cassava's strategic position.
3. **The terms of the AUC MoU and any AfCFTA Secretariat formalisation** — Currently neither is publicly released in full. The actual obligations and any exclusivity language will determine how much sovereignty space African institutions retain.
4. **The Cassava Sovereign Cloud trajectory** — Whether African governments adopt it for sensitive workloads will reveal whether "African-owned with Google inside" is acceptable to the digital sovereignty community, or merely a more palatable wrapper for the same architecture.
5. **Tax and antitrust contagion** — Whether the SA MDPMI ZAR 688m settlement and the Banga (2025) tax-sovereignty analysis catalyse other African competition authorities (Kenya, Nigeria, Egypt) to launch similar inquiries. If they do, Google's "exceeded $1bn" framing will increasingly need to be net of forced settlements.

8. Annexes

8.1. Organisation, offices and chain of command

Google operates four physical offices on the continent (about.google/locations; Usanifu News, Jan 2025):

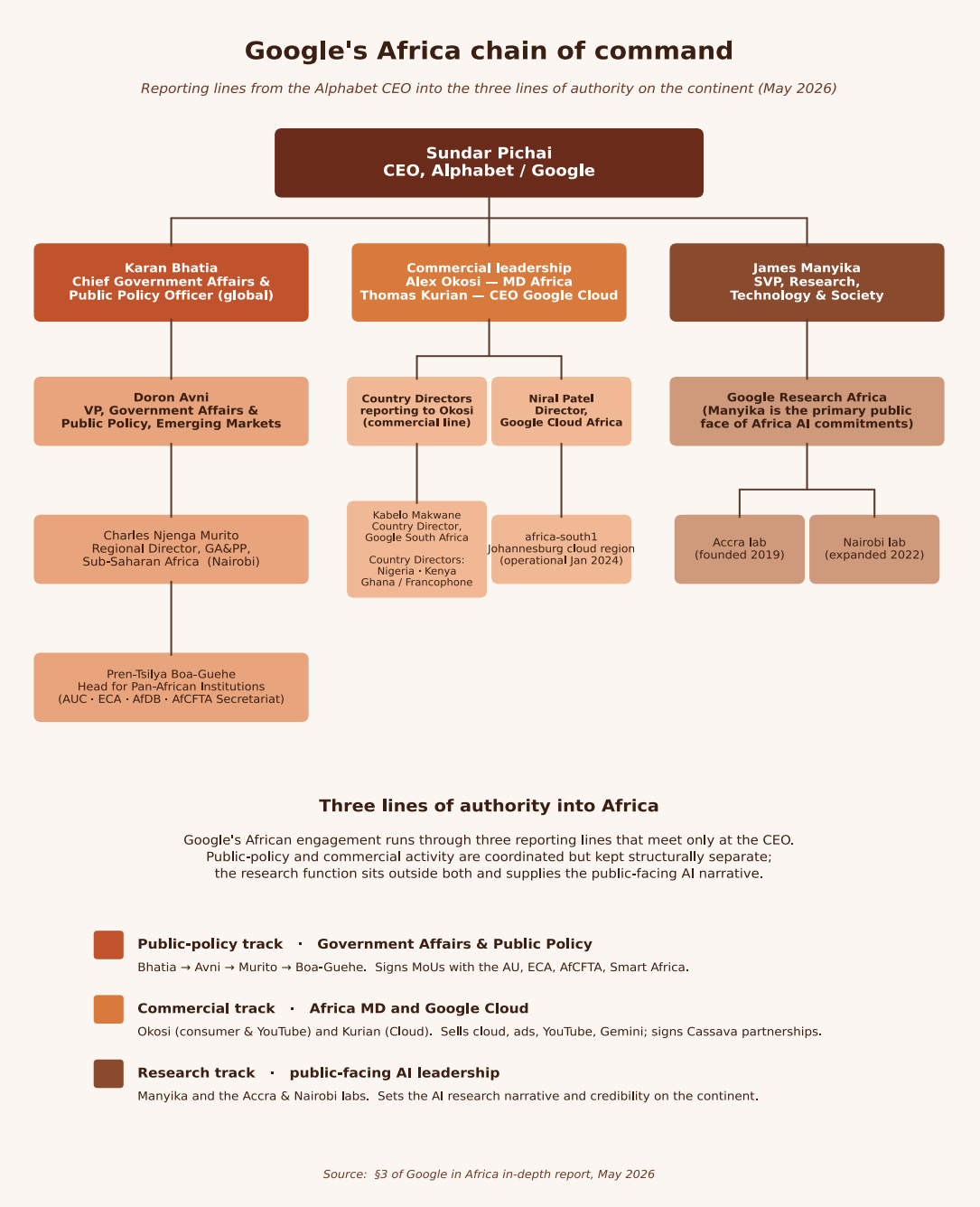
City	Country	Function
Johannesburg	South Africa	Country HQ for South Africa; co-located with `africa-south1` Cloud region operations
Lagos	Nigeria	Country HQ for Nigeria; Hustle Academy and Nigeria AI Academy delivery base
Nairobi	Kenya	Hub for East Africa, Google Research Africa, pan-African institutions team (new office opened Jan 2025)
Accra	Ghana	Google Research Africa AI lab; **AI Community Center** (opened July 2025)

Google Research Africa (founded Accra 2019; Nairobi expansion 2022) is the primary R&D arm on the continent (research.google/teams/africa-team).

- **Alex Okosi** — Nigerian-born; appointed Managing Director, Africa in September 2023 after 20+ years at Viacom/MTV Base Africa where he founded the channel (Africa CEO Forum profile; TechCabal). Okosi is the public face for commercial announcements (subsea hubs, Cassava deal, AI Mode in Africa).
- **Charles Murito** — Kenyan; Google's senior public policy figure in Sub-Saharan Africa since Feb 2020; signed the AUC–Google MoU on 17 Feb 2026 (AU press release). Independent non-executive director of Absa Bank Kenya.
- **Pren-Tsilya Boa-Guehe** — American of Ivorian heritage; former U.S. Foreign Service Officer at the U.S. Mission to the African Union, where she handled the AfCFTA portfolio; recruited by Google in early 2022 into a purpose-built role to engage AU, ECA, AfDB, and AfCFTA Secretariat (Google Blog, Apr 2022). She effectively leads Google's institutional diplomacy on the continent.
- **James Manyika** — Senior VP, Research, Technology & Society; the most senior Africa-born executive in Google leadership and the figure who announces the largest African investment numbers (he announced the four subsea hubs at the September 2025 UN General Assembly week) (Developing Telecoms).
- **Kabelo Makwane** — Country Director, Google South Africa as of 2025 (DataIQ profile).

Google does not publish a continental org chart, but the following structure emerges consistently across Google blog posts, press releases, and biographies.

(click diagram to enlarge)



8.2. Selected readings

- AU Press Release: *AUC–Google MoU* (17 Feb 2026)
- Banga (2025): *Trading away tax sovereignty?*, *JIEL*
- Cambridge BHRJ: *Digital Colonialism and the Role of Local Intermediaries* (2025)
- ECA: *Regional Data Commons for Africa* (Nov 2025)
- Google / Africa Practice / Genesis Analytics: *Equiano EIA Nigeria* (2022)
- Google / Nextrade: *AI Policy Blueprint for Africa* (2025)

- Google / Nextrade: *AI Skilling Blueprint for Africa*)2025)
- Google / Public First: *Google's Impact in Sub-Saharan Africa* (2024)
- Google / Wilton Park / FCDO: *Successfully Harnessing AI in Africa* (2025)
- Google Blog: *Investing in connectivity, products and skills for Africa's AI future* (Sep 2025)
- SA Competition Commission: *MDPMI Final Report* (Nov 2025)
- Smart Africa: *Google joins the Smart Africa Alliance* (29 Jul 2021)
- Smart Africa: *Smart Broadband 2025 Strategy*
- Smart Africa: *Transform Africa Summit 2025 communiqué* (Nov 2025)

8.3. Datasets

- Data centres (and metadata)
- Google Africa Blogs
- Investments reported in Google Africa Blogs