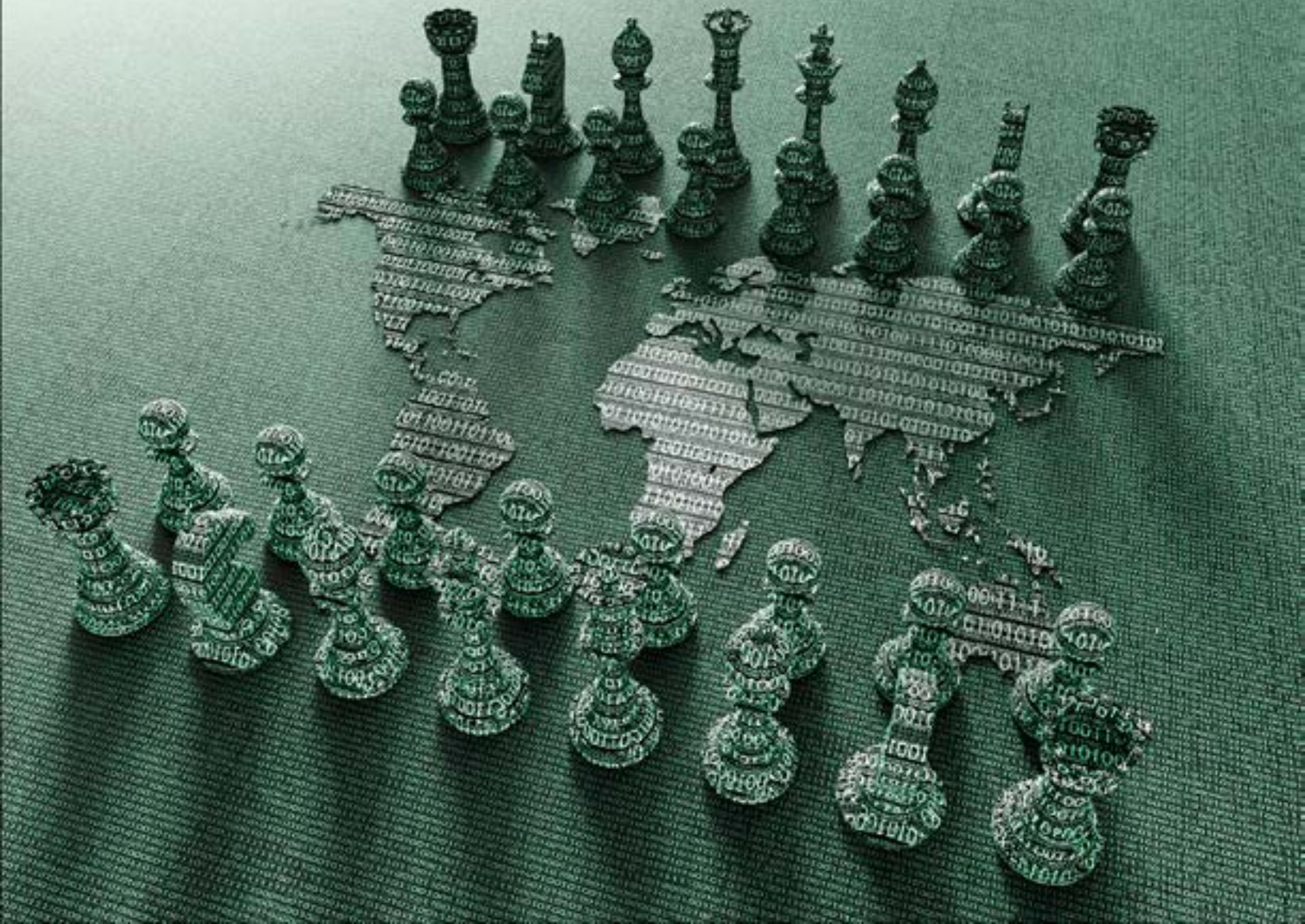
Centre for International
Governance Innovation

Conference Report – Webinar, November 19, 2024

The Geopolitical AI Chessboard: Securing Africa's Shared Commons

Folashadé Soulé-Kohndou, Leslie N. L. Mills and Charles Falajiki



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About the Authors

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Leslie Nii Lantey Mills is a research associate on the Negotiating Africa's Digital Partnerships policy research project, led by Folashadé Soulé-Kohndou, hosted at the University of Oxford and supported by CIGI. Previously, he worked in the Cabinet of the Togolese minister of digital economy and transformation, where he contributed to major public digital projects, including a pioneering digital cash transfer system that leveraged artificial intelligence and mobile payments to deliver shock-responsive social protection to vulnerable segments of the population. His research focuses on digital transformation and economic growth in developing countries. He earned an MPP from the Hertie School in Berlin, where he served on the student advisory board of the Centre for Digital Governance and co-founded the Africa Policy Club.

Charles Falajiki is a research assistant at the Arnold A. Saltzman Institute of War and Peace Studies, where he conducts research on cyber and international security policy as part of the Columbia University School of International and Public Affairs cyber program. His work focuses on cyber offence-defence balance, escalation dynamics in cyberspace and the cyber capabilities of small states. He holds an M.Sc. in education (digital and social change) from the University of Oxford.

Introduction

This conference report summarizes the key points and discussions from a webinar titled "Africa and the Geopolitics of Artificial Intelligence." Held on November 19, 2024, the webinar was convened under the Negotiating Africa's Digital Partnerships project hosted at the Blavatnik School of Government, University of Oxford, and supported by the Centre for International Governance Innovation.

The objective of the webinar was to explore the socio-technical concept of artificial intelligence (AI) development and regulation in Africa and the practice of African agency within the growing realm of AI geopolitics. The webinar delved into the political economy of AI in Africa, the complexities of AI geopolitics, and the opportunities and challenges they present to Africa's digital sovereignty.
The webinar featured four panellists: Rachel Adams, director of the Global Center on AI Governance; Barbara Glover, program manager of the African Union (AU) High-Level Panel on Emerging Technologies, AUDA-NEPAD; Akua Gyekye, director of Government Affairs, Africa, at Microsoft; and Yohannes Eneyew Ayalew, post-doctoral fellow at the European Research Council's Three Generations of Digital Human Rights project. The conversation was chaired by Folashadé Soulé-Kohndou, senior research associate at the University of Oxford and CIGI senior fellow, with Charles Falajiki, research assistant at Columbia University, as the discussant. The panellists discussed how AI is already impacting African geopolitics today (for example, through the surge in deepfake disinformation campaigns). With the rise of "AI nationalism" (where nations wrangle to spread a preferred view of AI policy, applied approaches and technical services), concerns about new forms of digital colonialism in Africa and threats to national security are rising.

Context

Competition between China and the United States is playing out on the global stage in the AI race or, as some have dramatically coined it, the "AI Cold War." Both sides show no signs of slowing down, with the United States holding a dominant lead. In 2023, AI investments in the United States surpassed $62.7 billion,[1] more than 8.7 times those of China, the next closest competitor (Maslej et al. 2024, 19). The United States wants to maintain its leadership of the AI race. Beyond existing export control measures, recent developments illustrating this escalating competition include proposals for a "Framework for Artificial Intelligence Diffusion" to align economic and technological initiatives with other like-minded nations. The return of the Trump administration to the White House and the escalating effects of its aggressive trade policies are compelling other powers to disrupt or contest technological dependency.

Amid this global context, other powers around the world seek to remain relevant by catching up in AI development or by finding a niche (such as France and India's "third way" in AI innovation [Chavez 2025]), though they still trail behind the dominant global players. African states have shown such ambitions, too. Several now have AI strategies (Kwarkye 2025), and the AU released a continental AI strategy in July 2024, focusing on harnessing AI for the continent's development and prosperity (AU 2024). It is non-debatable that Africa plays a crucial yet underappreciated role in the global AI industry, particularly in the value chain.

More discussed is the issue of infrastructure, the lack of which is a significant hurdle for Africa. Insufficient critical infrastructure, such as high-speed internet and reliable electricity supply, remains a challenge across the African region, limiting the extent to which AI could advance in the region. The amount of computational power (compute) needed to make any significant advancement in developing and training foundational AI models is currently not within reach of many African countries. Domestically, African actors face pressures to adopt AI systems. Still, the prohibitive financial cost of building high-end computational infrastructure and improving local data frameworks creates tensions

1 All dollar figures in US dollars.

for most governments that must make strategic choices between funding AI innovations, such as developing foundational AI models, or other critical social infrastructure. Admittedly, there have been recent upward trends in the investment in data centres in Africa, with countries such as Nigeria, Rwanda and Senegal attracting significant local and foreign investment in data centres and supercomputing in recent years (Boakye et al. 2023). However, the continent has only a handful of high-performing supercomputers, such as Toubkal, located in Morocco, which is largely insufficient to service the continental demand for AI research and development. Not least, generative AI and large language model (LLM) researchers struggling to access compute resources in their country or region often have to send their data abroad, thus entrenching dependency on third-party infrastructure on the continent. Even so, the demand for generative AI among the continent's young population is expected to grow exponentially over the coming decades. African AI projects such as GhanaNLP, Deep Learning Indaba, InkubaLM and Masakhane stand to benefit from any growth in computing capacity on the continent as the models, research and tools they develop become increasingly more advanced.

Africa is affected by the geopolitics of AI in myriad ways. Drawing from insights gathered from panellists during the webinar, this conference report includes an overview of some of the stakes and challenges levelled at the continent even as it works fervently toward harnessing the transformative economic potential of AI. It concludes by providing policy recommendations on what African governments and relevant stakeholders should prioritize to reach this strategic aim.

Discussion

Stakes of AI Geopolitics for Africa

One of the dimensions in which AI geopolitics will impact Africa is economic development. Projections suggest that AI can potentially transform the productivity and GDP of the global economy, with a total contribution of up to $15.7 trillion by 2030 (PWC 2017, 3). According to PWC's report, some of the most significant economic gains from AI will be in North America and China, which are likely to be home to 70 percent of the global economic impact of AI (China will see a 26.1 percent boost to GDP and North America a 14.5 percent boost in 2030), with other developed countries in Europe and Asia capturing much of the rest (ibid., 7).

Also, as the race to develop frontier AI capabilities increases, the demand for data processing and storage capacity will equally increase. The African continent can position itself to attract the associated economic growth of data centre expansion by providing space at a fraction of the cost, making the continent an ideal hub for serving a global customer base and a financially appealing option to competing digital empires looking to expand their AI critical infrastructure. The demand for talent and human resources is also at stake for Africa, as is the possible economic gain amid rising AI geopolitics.

During the webinar, one of the panellists highlighted that "while AI is often glamorized as a creative and revolutionary technology and Africa is perceived as a mere consumer, the reality is that the AI supply chain has materiality" (Adams 2024a). At the beginning of this chain is the extraction of raw materials — such as cobalt from the Democratic Republic of Congo — needed for technologies such as smartphones and batteries. This need for natural resources raises significant ethical concerns, including child labour and environmental degradation, as demand for these materials skyrockets (Adams 2024b). Beyond materials, Africa also contributes to developing AI systems through data labelling and reinforcement learning. Workers across the continent provide the human feedback needed to refine LLMs and other AI models, yet this work is often poorly paid, exploitative and unacknowledged (Crawford 2021). One panellist noted that "at the other end of the chain, Africa also serves as a dumping ground for digital waste. Sites like Agbogbloshie in Accra, Ghana, have become infamous for hosting discarded electronic devices, causing severe environmental and public health issues for local communities. These material realities of AI production are rarely acknowledged in global discussions about AI governance and policy" (Adams 2024a).

Another discussion during the webinar highlighted that "access to AI talent — spanning data scientists, machine-learning engineers,

cybersecurity professionals and infrastructure specialists — is fast becoming a defining factor in global competitiveness" (Gyekye 2024). The major AI giants are aware of this potential and have moved to establish partnerships and ventures to cultivate the next generation of African AI experts while also making investments into expanding local compute capacity. As one panellist noted, "Microsoft has partnered with [United Arab Emirates]-based firm G42, a collaboration that includes the development of a green data centre in Kenya to serve East Africa. In South Africa, Microsoft is expanding their existing data centre infrastructure with additional investment in cloud and AI capabilities, alongside a commitment to certify 50,000 individuals in high-demand fields like AI, cybersecurity and cloud architecture" (ibid.).

Meanwhile, the Government of Kenya has partnered with the United Nations Development Programme and Microsoft to launch the Africa Center of Competence for Digital and Artificial Intelligence Skilling, which is set to train local talent to build out public sector AI capabilities. Granted, the search for AI talent among advanced economies looking to cement their place as leaders in the global AI race will likely result in geopolitical competition for talents in Africa.

Panellists also noted that another implication of AI geopolitics in Africa is the political economy of hyperscale cloud infrastructure investment. Due to the fundamental positions of hyperscale cloud infrastructure as enablers of cloud-based economies and large-scale data processing, cloud computing infrastructure has become critical in AI geopolitics. US tech giants such as Amazon, Google and Microsoft dominate nearly 70 percent of the global public cloud market, while Chinese tech giants Alibaba, Huawei and Tencent control much of the remaining 30 percent (Lehdonvirta, Wu and Hawkins 2023). The location of hyperscale cloud infrastructure is also intrinsically linked to the broader topic of digital sovereignty and data localization, which several African states are beginning to consider more closely (Soulé-Kohndou 2024). For the African continent, the emerging geopolitics of cloud computing will mean that actors across the continent would have to compete and negotiate with more advanced economies to attract hyperscale cloud infrastructure firms and their investments into the continent. However, actors must consider the significance of benefit sharing. The benefits of AI are currently concentrated among a handful of companies and individuals, and African actors must find a way to navigate this inequality to ensure that the continent has its share of global AI benefits.

Also at stake for the African continent amid the rising geopolitics of AI is the future of AI governance and regulation on the continent and, crucially, who determines the technical standards governing these technologies. For example, key components of technology governance such as international technical standards, often negotiated by various standards development organizations such as the International Telecommunication Union's Telecommunication Standardization Sector, the International Organization for Standardization or the International Electrotechnical Commission, are central to technology competition and geopolitics. Ostensibly neutral in their objectives, technical standard setting is a significant playing field for political and economic rivalry (Rühling 2023). Technical standards can potentially create lock-in effects and path dependencies; providers of critical digital infrastructure, such as fifth-generation technology, usually have a geopolitical advantage in shaping how such technology is designed and what ethical values are imprinted on it. Emerging countries and regions such as Africa are vulnerable to becoming "standards adopters" rather than creators of standards as they procure most of their technology from developed countries.

Reflecting on the Past to Plot Africa's AI Future

One panellist noted that "historical perspectives on technology and geopolitics are often neglected in the discourse about AI geopolitics. Historically, technology has given nations with higher technological capabilities bargaining power over nations without such capabilities. The printing press, electricity and the internet fundamentally transformed societies and altered global power dynamics. However, they also introduced inequalities and challenges that were often overlooked" (Glover 2024).

Consider the example of railroads during the colonial era. While railroads were presented as a development tool, they were designed to extract resources from Africa to Europe. The Kenya-Uganda railway, for instance, was often referred to as the "Lunatic Express" because it seemed to serve no local purpose (Kimari and Ernstson 2020). It was not designed to connect African cities or support

local economies — it was purely an instrument of resource extraction. Today, African actors must form solidarity to scale the magnitude of their voices and bargaining power. According to one panellist, "Drawing from the same fervour that drove the wave of decolonization across the continent, Africa should revive the continent solidarity for AI policies" (Glover 2024). The continent should consider adopting the ethos of AI non-alignment to collaborate and foreground African agency while engaging with today's digital powers.

Strengthening regional cooperation is essential for achieving collective goals. The African Union's Continental Artificial Intelligence Strategy provides a framework for aligning efforts across the continent (AU 2024). Initiatives such as the Program for Infrastructure Development in Africa are already attracting investments in information and communications technology infrastructure, including AI-related projects. However, investments must be directed toward addressing local needs and maximizing impact.

Recommendations

As AI continues to influence classical geopolitical dynamics, countries must become more agentic in navigating their AI development strategy in the new terrain of international relations. For the African continent, despite the current challenges, there are significant opportunities that can help the continent to position itself as a critical force within the global landscape of AI geopolitics and leapfrog its own AI and digital sovereignty ambition.

Drawing on discussions during the webinar, African states and stakeholders should consider the following policy recommendations.

Focus on building digital infrastructures, both baseline infrastructure such as high-speed internet and critical high-performance computing infrastructure, to support local AI development.

At the centre of this policy is prioritizing multi-stakeholder partnerships, pooling resources from the private sector and foreign investments. To foster the growth of critical infrastructure, an important consideration for the AU, with its member states, is initiating a continent-wide pool for funding open and accessible AI computing infrastructure. Similar to the European High Performance Computing Joint Undertaking project that aims to develop exascale supercomputers for Europe, the AU, with its member states, can strategically plan to crowd in investment to focus on increasing the computational capacity of the continent. One of the advantages of this approach is that it helps the continent to avoid the failure that can arise from national efforts, such as France's sovereign cloud project initiated in 2009 and shut down in 2020. This approach could also increase the availability of public option AI infrastructure that can lower barriers and democratize access for researchers and innovators compared to when such infrastructure is locked within profit-driven enterprises.

Establish a comprehensive data protection and AI regulation framework to enhance AI governance and development in Africa, particularly in response to the challenges posed by rising geopolitics.

Although there are contextual realities that can shape the development of data protection legislation across different nations on the continent, the AU and its member states need to work together to increase the ratification of the Malabo Convention[2] (also known as the African Union Convention on Cyber Security and Personal Data Protection) and implement robust data protection regimes, as in the case of the European Union's General Data Protection Regulation. This regional corporation is an important policy option for the continent to set the foundation for a contextual AI governance regime. The EU Artificial Intelligence Act,[3] an example of the first comprehensive regulation on AI by a major regulator anywhere (and its potential to become the international standard for AI regulation), show how a comprehensive regulation can serve geopolitical advantage. Considering the highly polarized regime of the global AI regulation landscape, developing

2 *African Union Convention on Cyber Security and Personal Data Protection*, 27 June 2014 (entered into force 8 June 2023), online: <https://au.int/en/treaties/african-union-convention-cyber-security-and-personal-data-protection>.

3 EC, *Regulation (EU) 2024/1689 of the European Parliament and of the Council of 13 June 2024 laying down harmonised rules on artificial intelligence and amending Regulations (EC) No 300/2008, (EU) No 167/2013, (EU) No 168/2013, (EU) 2018/858, (EU) 2018/1139 and (EU) 2019/2144 and Directives 2014/90/EU, (EU) 2016/797 and (EU) 2020/1828 (Artificial Intelligence Act)*, [2024] OJ, L 2024/1689, online: <https://artificialintelligenceact.eu/>.

AI regulation in Africa should focus on approaches that incentivize innovation and foreground standard ethical principles. In the case of the African continent, lessons can be learned from regulatory approaches, such as outcome-based regulation, that clearly define expected regulatory objectives and allow the ecosystem to develop processes required for achieving the predetermined outcomes. If coordinated effectively (for example, through multi-stakeholder consultation for developing these standards), an outcome-based approach to AI regulation would ultimately provide the needed flexibility that supports innovation while ensuring that contextually relevant standards are met. Also, an outcome-based approach would support the development of an AI regulation framework that does not mandate a one-size-fits-all approach to the multifaceted negative impact of AI adoption. However, regulating AI should not be confined to geopolitical strategy or merely serve as a "governance fix" — diverting attention from the more challenging social issues related to AI (Ulnicane 2025). Instead, a continent-wide AI regulation framework should help ensure that the African continent adopts models that respond to local contexts and concerns.

Adopt a stringent approach to AI-related procurement, prioritizing national security concerns and harnessing economic diplomacy at global multilateral fora to engage with relevant countries and companies.

With the dilemma presented by AI geopolitics among China, the European Union, the United States and other middle powers, African actors need to consider the choices that influence their procurement of critical infrastructure such as cloud computing. There is an undeniable tension between investing in compute capabilities and managing environmental and energy challenges, such as water resources and energy density issues. South Africa's 2025 presidency of the Group of Twenty economic community and the AU being a full member of the group present an opportunity to advocate for Africa's priorities, including equitable access to AI technologies, open-source digital public infrastructure and investments that align with local needs. African actors should negotiate and work toward building a federated network of data centres across the continent to balance access and costs. African institutions must lead the way in promoting the development and adoption of technology and digital ethics that embody African cultural norms and values, such as "Ubuntu,"[4] and advocate to feed into the discourse of global AI governance frameworks (Ayalew 2024). The African Union's Continental Artificial Intelligence Strategy, which emphasizes Ubuntu in shaping ethical AI frameworks as much as it calls for building capacity, protecting data sovereignty and fostering regional cooperation, is a promising development. However, there is still much to be done at the national level. African social values of accountability, transparency, benefit sharing and community cohesion should shape the framing of the continent's governance frameworks. This dual focus will ensure that the implementation of AI technology aligns with the continent's strategic interests and promotes safe, responsible usage of AI (Gwagwa, Kazim and Hilliard 2022).

Conclusion

Emerging AI geopolitics and the political economy of computing are likely to (re)structure the order of digital international relations in the coming years, with significant implications for how "third countries" and regions such as Africa navigate the future of AI. The geopolitical implications of AI have the potential to impact economic growth in Africa, affect digital sovereignty objectives and likely shape the future of AI governance on the continent. While ostensibly considered the battlefield for today's digital empires, the African continent has the geopolitical advantage to secure its relevance in the global AI landscape by prioritizing strategic regional alignment and addressing local challenges in infrastructure and a consistent data regulation regime. Moving beyond the preliminary focus on national AI strategies, African governments must develop and adopt robust data and AI regulation frameworks, such as an outcome-based regulation approach that incentivizes innovation and establishes a standard for safe AI.

4 The term "Ubuntu" (meaning "a person is a person through other persons") is used in literature to describe African morality and the way of life. Ubuntu has been further expanded by African philosophers to qualify as a moral theory. See Gwagwa, Kazim and Hilliard (2022).

Agenda

November 19, 2024

2:00 p.m.–2:10 p.m. **Welcome Address**

→ **Folashadé Soulé-Kohndou**, Senior Research Associate, Blavatnik School of Government, University of Oxford; Visiting Scholar, University of Ghana

2:10 p.m.–2:20 p.m. **Opening Remarks**

→ **Folashadé Soulé-Kohndou**

2:20 p.m.–3:20 p.m. **Panel: Africa and the Geopolitics of AI**

→ **Moderator: Charles Falajiki**, Research Assistant, School of International and Public Affairs Cyber Program, Columbia University

- **Rachel Adams**, Director, Global Center on AI Governance
- **Barbara Glover**, Program Manager, African Union High-Level Panel on Emerging Technologies, AUDA-NEPAD
- **Akua Gyekye**, Director, Government Affairs, Africa, Microsoft
- **Yohannes Eneyew**, Post-doctoral Fellow, Three Generations of Digital Human Rights, European Research Council

3:20 p.m.–3:55 p.m. **Q&A**

3:55 p.m.–4:00 p.m. **Closing Remarks**

→ **Folashadé Soulé-Kohndou**

Panellists

Rachel Adams
Director, Global Center on AI Governance

Yohannes Eneyew Ayalew
Post-doctoral Fellow, Three Generations of Digital Human Rights, European Research Council

Charles Falajiki
Research Assistant, School of International and Public Affairs Cyber Program, Columbia University

Barbara Glover
Program Manager, African Union High-Level Panel on Emerging Technologies, AUDA-NEPAD

Akua Gyekye
Director, Government Affairs, Africa, Microsoft

Folashadé Soulé-Kohndou
Senior Research Associate, Blavatnik School of Government, University of Oxford; Visiting Scholar, University of Ghana

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