GLOBAL SIGNALS

Data Centers Consumed 17% More Electricity in 2025. AI Facilities Alone Surged 50%. The Grid Is Not Ready.

The International Energy Agency's updated analysis finds global data center electricity consumption grew 17% in 2025, with AI-focused facilities surging 50% — against 3% overall global electricity demand growth. By 2030, data center power use is projected to roughly double from 485 TWh to 950 TWh, with AI-focused facilities tripling. The binding constraint on AI's expansion is no longer capital or chips. It is power — and the grid was not built for this.

> **Why it matters:** For communities already bearing grid congestion costs, hospitals rationing backup power, and students in countries where reliable electricity is not guaranteed — the expansion of AI infrastructure is a direct competition for a scarce resource. Who wins that competition is being determined right now by procurement decisions, grid interconnection queues, and energy policy — not by innovation.

Source: IEA Key Questions on Energy and AI

ALSO THIS WEEK

- Three US microreactors achieved criticality in a single month, fulfilling a presidential executive order deadline by hours — nuclear timelines compressing from decades to months. [source]
- Grid approval timelines of 24–36 months have made power the single binding constraint on hyperscale AI buildout ahead of capital or hardware. [source]

INFRASTRUCTURE

Kenya's $1 Billion Data Center Is Stalled. The Constraint Is Not Financing — It Is the Grid.

The Microsoft/G42 $1B Kenyan data center project remains in negotiation after it became clear that a facility at its intended scale would consume roughly a third of Kenya's entire national grid. The same constraint applies across sub-Saharan Africa: data center ambitions are running into grid realities that require sequencing infrastructure investment first, not treating grid capacity as a downstream benefit of signing deals with hyperscalers.

> **Why it matters:** For entrepreneurs, researchers, and students who expected to access globally competitive compute from Nairobi — the stall is not a financing story. It is a governance story

about what agreements get signed before local capacity is verified, and who bears the risk when they are not.

Source: Data Center Dynamics | CNAS Sovereign AI Index

Note: Describe as "stalled / in negotiation", not cancelled. CNAS index data current to January 2026.

ALSO THIS WEEK

- CNAS Sovereign AI Index: 80%+ of disclosed sovereign AI investment concentrated in Middle East and East Asia. 70% of projects involve foreign partners. [source]
- Africa holds less than 1% of global data center capacity while having a 19-year median age and 40% annual mobile data growth. [source]

EDUCATION & HUMAN CAPACITY

Africa's Talent Pipeline and Infrastructure Pipeline Are Running in Opposite Directions.

The continent with the world's youngest population — a median age of 19 — and the fastest-growing mobile data consumption has less than 1% of global AI compute capacity. A generation of African students and workers is developing AI literacy and digital skills without access to the compute infrastructure that would let them build, train, or own the tools they are being trained to use.

Why it matters: For a student in Kampala learning to use AI tools built and trained elsewhere, or a developer in Lagos building on cloud infrastructure owned by companies headquartered thousands of miles away — the gap between skills acquisition and infrastructure access is not a temporary inconvenience. It is the architecture of a new dependency being locked in while the foundational decisions are still being made.

Source: Al Jazeera, June 26 2026 | CNAS Sovereign AI Index

ALSO THIS WEEK

- Only 7% of sovereign AI projects globally are data initiatives vs 59% infrastructure — a critical gap for education and health sectors in every emerging economy. [source]
- Survey data from UK and US enterprise leaders shows AI training investment rising while reported skills gaps continue to widen — 70% of businesses give staff AI tools, but only 48% set aside time to use them. [source]

CREATIVE INDUSTRIES

Nollywood Is Building Its Own AI Infrastructure — and the Submission Window Is Open Now.

Nigerian filmmakers and AI practitioners are not waiting for global platforms to include them on better terms. The Naija Artificial Intelligence Film Festival (NAIFF), now in its second edition, drew over 400 submissions in its inaugural year and returns to Alliance Française Lagos in September 2026, with submissions open through July 31. The festival explicitly encourages films in Pidgin, Yoruba, Hausa, Igbo, and French — a deliberate assertion that AI-enabled storytelling in Africa should be trained on African languages and aesthetics, not optimized for Western platforms. Makemation, Africa's first AI-themed feature film, directed by Nigerian AI developer Toyosi

Akerele-Ogunsiji, has been touring internationally after a successful 2025 Nigerian cinema run, including a screening at the Harvard Center for African Studies.

> **Why it matters:** For a filmmaker in Lagos, a musician in Accra, or a game developer in Nairobi — the question is not whether AI will reshape creative production, it will — but whether the tools that reshape it will be trained on their work, in their languages, reflecting their aesthetics. NAIFF is one of the few institutional structures being built to ensure the answer is yes.

Source: The Lagos Review (NAIFF 2026) | FilmFreeway submissions | The Conversation / Harvard (Makemation)

ALSO THIS WEEK

- Dubai $1M AI Film Award won by Tunisian filmmaker Zoubeir Jlassi for his film 'Lily' — most significant new prize infrastructure for AI-themed creative work globally. [source]
- AI-generated music is flooding streaming platforms and reducing royalty income for working musicians in Latin America and West Africa — a market-saturation harm distinct from training-data litigation. [source]

REGIONAL LENS

Sovereign AI: 130 Projects Tracked, 80% of Capital in Two Regions, and a Governance Gap Every Other Nation Needs to Understand.

The CNAS Sovereign AI Index tracks 130+ government-backed AI projects globally. The structural finding: more than 80% of all disclosed investment is concentrated in the Middle East and East Asia, with the UAE and Japan accounting for over two-thirds. Seventy percent of projects involve foreign partners; NVIDIA supplies GPUs for 52% of all infrastructure globally. Africa holds less than 1% of global data center capacity while having the world's youngest population and fastest-growing mobile data consumption.

> **Why it matters:** For a Kenyan smallholder using an AI advisory tool, a South African student on an AI tutoring platform, or a Nigerian entrepreneur building on cloud-hosted infrastructure — the question of who controls the data and the compute underneath their daily tools is not abstract. The governance agreements being signed this year will determine the answer, and most of the people affected will never read them.

Source: CNAS Sovereign AI Index (data to January 2026) | Al Jazeera, June 26 2026

Note: Index data current to January 2026 — note this when citing figures.

ALSO THIS WEEK

- Canada's AI Sovereign Compute Infrastructure Program (CAD 890M) — non-profit/post-secondary leadership requirement is a replicable template for mid-tier nations. Award pending. [source]
- South Africa withdrew its draft national AI policy after investigators found at least 6 of 67 academic citations were AI-generated hallucinations — a governance capacity gap story. [source]

OPPORTUNITIES & EVENTS

Two UN AI Governance Convenings Land in Geneva the Same Week — Both Open for Registration.

The AI for Good Global Summit (July 7–10, Palexpo Geneva) and the UN Global Dialogue on AI Governance (July 6–7, also Geneva) arrive in the same week. Together they form the closest thing the UN system has to a single annual checkpoint where Global South governments, civil

society, and the private sector can shape AI governance norms before they harden elsewhere. Registration is open for both.

> **Why it matters:** For an NGO, university, or Global South delegation with a limited travel budget — this is a rare single-week window to be in the room and influence governance language directly, rather than responding to outcomes after the fact.

Source: AI for Good / ITU-UNESCO

ALSO THIS WEEK

- NAIFF 2026 submissions open now through July 31 — filmmakers and digital creators invited to submit AI-driven work. Free via FilmFreeway. [source]
- AfDB's $10B AI for Africa initiative is in its ignition phase — the window when anchor partnerships are being established. [source]
- Canada's AI Sovereign Compute Infrastructure Program (CAD 890M) — non-profit leadership requirement. Award announcement pending. [source]

ONE SIGNAL WE ARE WATCHING

The binding constraint on AI's expansion is no longer capital or compute — it is power. This week's IEA report, Kenya's stalled data center, Africa's population locked out of AI infrastructure, and Nollywood's push to build African AI creative infrastructure are all chapters of the same argument: the communities with the most to gain from AI are the least positioned to power it, govern it, or train it on their own terms. The NAIFF submission window — open right now through July 31 — is one of the few places where that argument is being answered with action rather than analysis.

AI for All Global Brief is a publication of Tomorrow Foundation.