

DC254 · ANNUAL MARKET REPORT

Kenya Data Centre Index 2026

The first open, facility-level census of Kenya's data centre market — 16 tracked facilities across a staged supply pipeline, every number sourced, dated and free to read.

Data Centre 254

data-centers-254.vercel.app — open data, no signup wall

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1. Executive Summary

Kenya's data centre market has reached an inflection point. The country now hosts 16 tracked facilities across 12 operators, with 21.0 MW of built, commissioned capacity, of which 14.3 MW is verified live IT load, and a further 171 MW moving through the development pipeline: 18 MW under active construction, 53 MW committed on secured land, and 100 MW announced at an early stage, yielding a total supply figure of 192.0 MW across all four stages.



Three stories define the market in this edition. First, scale is arriving at hyperscale grade: iXAfrica's Mombasa Road campus alone accounts for 76 MW across its live, under-construction and committed phases, while the announced Microsoft–G42 joint venture would add 100 MW at a single site — a project whose progress is now gated less by capital than by Kenya Power's ability to deliver grid capacity. Second, the demand side is diversifying: M-Pesa's transaction volumes, cloud-region interest from global operators, and AI startup growth are pulling the market from retail colocation toward wholesale. Third, transparency is improving, but unevenly — this Index exists to fix that, publishing facility-level capacity, staging, sourcing and verification dates that institutional trackers keep behind paywalls.

Every figure in this Index carries a source, a verification date and a confidence rating, and the full per-facility dataset is free to browse at data-centers-254.vercel.app/directory. The Index will be republished as new facilities commission or stage changes are verified, so the number you can defend is always the one we publish.

2. Market Overview

Kenya is East Africa's digital gateway and one of Africa's five principal data centre markets alongside South Africa, Nigeria, Egypt and Morocco. Nairobi ranks as the continent's second-largest fintech hub after Johannesburg, anchored by Safaricom's M-Pesa — a payments platform whose annual throughput is measured in tens of trillions of Kenyan shillings and whose core infrastructure runs from facilities in Nairobi. Every M-Pesa tap, every mobile money float, and every cloud-hosted government service terminates in a building this Index tracks.

The market's geography is unusually legible. Capacity clusters in two cities: Nairobi, where enterprise demand, peering (KIXP) and fibre converge; and Mombasa, where six active submarine cables — SEACOM, TEAMS, EASSy, LION2, DARE1 and PEACE — make landfall, with a seventh (Meta-backed Daraja) in development. That cable concentration explains why coastal colocation, despite its modest scale, commands strategic value for low-latency access to international bandwidth.

Structurally, the market is transitioning from a retail colocation base — dominated by telecom-affiliated enterprise halls — toward wholesale and hyperscale supply. The opening of iXAfrica NBOX1 in 2024 as East Africa's first purpose-built, AI-ready hyperscale facility marked the turn. Demand drivers now include cloud-region interest from global operators, GPU-dense AI workloads that consume four to ten times the power per rack of traditional servers, and data-localisation expectations tied to Kenya's Data Protection Act. All three trends push capacity requirements beyond what the installed base can serve, which is precisely what the pipeline in Section 3 responds to.

3. The Supply Pipeline

DC254 stages every facility on a four-step pipeline that mirrors the language global market trackers use: **Live** (built and commissioned), **Under Construction** (financed, build underway), **Committed** (land or funding secured, pre-build) and **Early Stage** (announced intent). Total supply of 192.0 MW is the sum of designed capacity across all four stages. Within the live fleet, 14.3 MW is verified in-service IT load; publishing both numbers side by side keeps announced capacity honest against what actually draws power today.

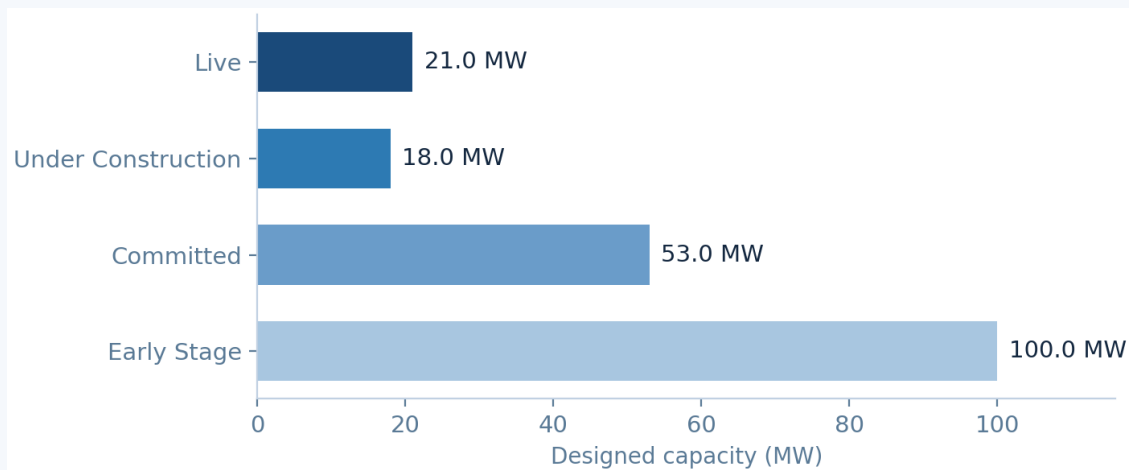


Figure 1: Kenya's data centre supply by pipeline stage, August 2026 (DC254 facility tracker).

The live fleet is real but shallow. Twelve facilities averaging under 2 MW of designed capacity each serve a digital economy of tens of millions of internet users — a utilisation profile that explains why retail colocation pricing has remained firm and why wholesale entrants see headroom. The under-construction tier is dominated by iXAfrica NBOX1.2: an 18 MW, 3,744-rack expansion on the Mombasa Road campus with financing secured and construction underway. On completion it will lift the NBOX1 campus to 22.5 MW, the largest single-site campus in Greater East Africa.

The committed and early-stage tiers carry the market's optionality — and its risk. The 53 MW Tilisi campus (iXAfrica NBOX2) rests on 11 acquired acres in a master-planned development near Limuru, roughly 30 kilometres from NBOX1, and represents the operator's medium-term growth vector. The 100 MW Microsoft–G42 joint venture, by contrast, remains at an early stage: the site is yet to be fixed and the project has been stalled by a hard constraint — Kenya Power cannot currently deliver the required 100-plus megawatts at a single site. Its progression through the pipeline is the single most consequential datapoint to watch in Kenya's market.

Stage	Definition	Facilities	Capacity (MW)	Notes
Live	Built and commissioned	12	21.0	14.3 MW live IT load
Under Construction	Financed, build underway	1	18.0	iXAfrica NBOX1.2
Committed	Land or funding secured, pre-build	1	53.0	iXAfrica Tilisi campus
Early Stage	Announced intent	2	100.0	Incl. Microsoft–G42 (100 MW); one facility undisclosed

Table 1: Supply pipeline summary, August 2026. Total supply: 192.0 MW.

4. Operator Landscape

Twelve operators track into this edition, but capacity concentrates sharply. Counting announced and joint-venture capacity, the Safaricom-partnered Microsoft–G42 venture (102 MW including Safaricom's own Waiyaki Way facility) and iXAfrica (76 MW across three projects) together control roughly 92 percent of total staged supply. Africa Data Centres — part of Cassava Technologies, which operates more than 40 facilities across 13 African countries — holds the largest diversified footprint at 6.5 MW over three Kenyan sites, including the only tracked facility in Mombasa.

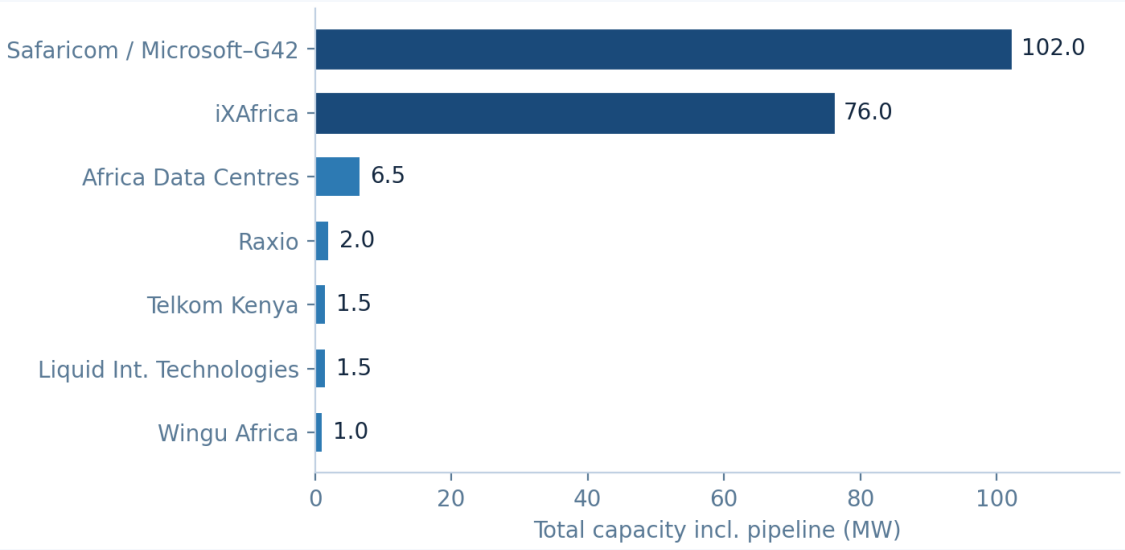


Figure 2: Total capacity by operator, including announced pipeline, August 2026 (MW).

Beneath the hyperscale tier sits a long tail of carrier-neutral and enterprise operators — Raxio (backed by IFC investment), Liquid Intelligent Technologies, Wingu, Telkom Kenya, Septris, Global TS and Wananchi — whose facilities cluster between 0.5 and 2 MW. This tier matters for a specific reason: interconnection. Carrier-neutral halls are where networks, content and enterprise tenants meet, and their density is a leading indicator of market maturity. Kenya Data Centres, an ICT Authority-linked entrant, has announced an SME-focused colocation facility targeting precisely the underserved mid-market between these tiers.

5. Facility Directory

The table below lists every facility in the DC254 tracker, ordered by pipeline stage and capacity. Capacity is designed (developer-stated) capacity; live IT load is verified in-service demand. Confidence reflects the strength of independent evidence behind each record — High means operator-confirmed figures corroborated by trade press or filings, while Low indicates operator-claimed figures without independent corroboration. Each record carries its source and verification date in the online directory.

Facility	Operator	City	Stage	Cap. (MW)	Live (MW)	Conf.
Microsoft–G42 AI Data Centre	Safaricom / Microsoft / G42	Nairobi	Early Stage	100.0	n/a	High
iXAfrica NBOX2 (Tilisi)	iXAfrica Data Centres	Nairobi (Limuru)	Committed	53.0	n/a	High
iXAfrica NBOX1.2	iXAfrica Data Centres	Nairobi	Under Construction	18.0	n/a	High
iXAfrica NBOX1	iXAfrica Data Centres	Nairobi	Live	5.0	4.5	High
Africa Data Centres Nairobi 1	Africa Data Centres	Nairobi	Live	3.0	2.0	High
Africa Data Centres Nairobi 2	Africa Data Centres	Nairobi	Live	2.5	1.5	High
Raxio Nairobi	Raxio Data Centres	Nairobi	Live	2.0	1.2	Medium
Safaricom Data Centre (Waiyaki Way)	Safaricom	Nairobi	Live	2.0	1.5	Medium
Telkom Kenya Data Centre	Telkom Kenya	Nairobi	Live	1.5	0.8	Medium
Liquid Nairobi Data Centre	Liquid Intelligent Technologies	Nairobi	Live	1.5	1.0	Medium
Africa Data Centres Mombasa	Africa Data Centres	Mombasa	Live	1.0	0.5	Medium
Wingu Nairobi	Wingu Africa	Nairobi	Live	1.0	0.5	Medium
Septis Data Centre	Septis EO	Nairobi	Live	0.5	0.3	Low
Global TS Data Centre	Global Telecommunications & Services	Nairobi	Live	0.5	0.3	Low
Wananchi Group Data Centre	Wananchi Group	Nairobi	Live	0.5	0.2	Low
Kenya Data Centres SME Facility	Kenya Data Centres	Nairobi	Early Stage	n/a	n/a	Low

Table 2: DC254 facility directory, August 2026. Tier ratings and connectivity data per facility are published in the online directory.

6. Infrastructure Context

Data centres are downstream of three physical systems (power, fibre and subsea connectivity), and Kenya's endowments in all three shape the market's trajectory. Kenya Power's grid is one of Africa's cleanest, with roughly three-quarters of generation from geothermal, hydro and wind, anchored by the Olkaria geothermal field. That renewable profile is increasingly a commercial argument: sustainability-conscious cloud and AI tenants can contract greener uptime in Kenya than in most competing regional locations. The constraint is delivery rather than generation: as the Microsoft-G42 stall demonstrates, last-mile grid capacity for a 100 MW single site is not yet assured, and tariff structures remain a live cost variable for operators.

Connectivity follows a similar pattern of concentration and strength. Six active submarine cable systems land in or near Mombasa, with aggregate design capacity in the tens of terabits per second, and terrestrial fibre runs the roughly 500 kilometres from the coast to Nairobi's carrier-neutral halls. The Kenya Internet Exchange Point (KIXP) keeps domestic traffic local with 85 member networks and peak traffic measured in the hundreds of gigabits. For facility siting, the rule of thumb this Index applies is simple: cable-adjacent for latency and transit economics (Mombasa), demand-and-peering-adjacent for enterprise and cloud workloads (Nairobi). The planned Daraja cable would add a seventh system and materially de-risk the country's international bandwidth exposure.

Two demand-side currents complete the context. Kenya's digital-economy trajectory — mobile-money density, a mature developer ecosystem, and government digitisation programmes — keeps baseline enterprise demand compounding. And the AI build-out across East Africa, from GPU colocation offers to model-training initiatives serving African languages and markets, is the first demand class that arrives pre-sized for hyperscale halls rather than enterprise rooms. Both currents push in the same direction: more MW, denser racks, and a premium on facilities that can deliver both.

7. Outlook & Watchlist

The direction of travel is unambiguous: total staged supply has roughly doubled versus the live base on the strength of a single construction cycle, and the wholesale turn is now visible in facility design — larger floorplates, higher per-rack densities, and AI-ready power and cooling envelopes. If the under-construction and committed tiers deliver on schedule, Kenya's built capacity approaches 40 MW within the horizon of this edition's data, with a credible path materially beyond it.

The risks are equally legible. Grid delivery is the gating constraint for the market's largest announced project; execution risk concentrates in a single operator's construction cycle; and the SME segment the market rhetoric celebrates remains thinly served. The watchlist below is what the DC254 editorial desk tracks on an ongoing basis — each item is a staged, sourced datapoint that will move this Index at the next edition.

Watch item	What confirms it	Pipeline effect
Microsoft–G42 grid allocation	Kenya Power single-site feasibility for 100+ MW	Early Stage → Committed
iXAfrica NBOX1.2 completion	18 MW go-live; campus to 22.5 MW	Under Construction → Live
iXAfrica Tilisi build start	Construction mobilisation on acquired land	Committed → Under Construction
Daraja submarine cable	Meta-backed seventh cable landing	Connectivity resilience
Kenya Data Centres SME facility	Site and capacity disclosure	Early Stage definition

Table 3: DC254 watchlist — datapoints most likely to move the next edition.

8. Methodology & Data Provenance

This Index is built from a facility-level tracker maintained continuously and verified as of August 2026. Every record follows the same discipline: the **claim** (a specific, stated figure), the **source** (operator statements, trade press, filings or direct publication), the **date verified**, and **independent evidence** where available. Records carry a confidence rating — High, Medium or Low — reflecting corroboration strength. We publish corrections openly and re-verify the full dataset at each edition.

Definitions matter, and we print ours. **Live** capacity is the designed capacity of built, commissioned facilities; **live IT load** is verified in-service demand and is reported separately so utilisation can be judged honestly. Pipeline figures are developer-announced designed capacity, staged by build evidence: financing and construction for Under Construction; secured land or funding for Committed; publicised intent without binding milestones for Early Stage. Figures are stated in megawatts of IT capacity and rounded to 0.1 MW; facilities without disclosed capacity are counted but excluded from MW sums.

Reconciliation note: international trackers report Kenya's total supply in the region of 164 MW across roughly 23 facilities on an announced-pipeline basis. Differences from this Index's 192.0 MW arise from tracker scope, staging criteria and project inclusion rather than from any mystery in the arithmetic. DC254 publishes per-facility sourcing and verification dates precisely so any analyst can reconcile the difference line by line, which is what open data is for.

Known limitations are stated plainly. Utilisation is inferred from operator disclosure rather than metered data; two Early Stage projects carry limited public detail; and positions, where mapped, are schematic. The tracker covers standalone commercial and enterprise facilities; on-premises server rooms and edge micro-sites below roughly 100 kW are out of scope for the Index's MW aggregates.

9. About DC254

Data Centre 254 (DC254) is an open intelligence platform for Kenya's data centre and digital infrastructure market. It publishes a 16-facility live directory with per-facility provenance, a staged market snapshot, a 58-article editorial library spanning infrastructure, energy, connectivity and AI topics, a glossary, and a research desk — all free, with no signup wall and no paywalled analytics. The platform is readable offline as an installable app, and every article can be listened to in the browser.

This Index is the first edition of an ongoing publication. The live dataset, the staged market snapshot and each facility's full provenance record are maintained at data-centers-254.vercel.app/directory, and feedback, corrections or operator disclosures are welcomed through the site's contact channels. Figures in this edition reflect verification as of August 2026.

Disclaimer: This report is provided for informational purposes only and does not constitute investment advice. Figures are compiled from publicly available sources believed reliable as of the verification date; capacity and pipeline status change frequently. Readers should verify current status against the live DC254 directory before relying on any figure.