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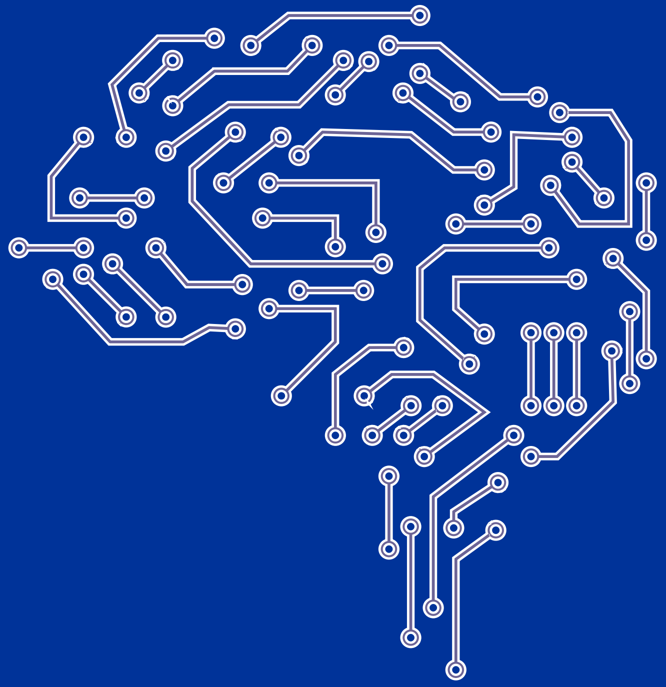
TOGO
DATA CENTER MARKET BRIEFING



A strategic overview of the data center investment opportunity in Togo

A Xalam Analytics Country Report

July 2025

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DATA GOVERNANCE IN AFRICA

This report is part of a series of market briefs developed by Xalam Analytics at the behest of Digital Investment Facility (DIF) under the Data Governance in Africa Initiative, on the data center market opportunity in sub-Saharan Africa ("SSA"). This analysis aims to provide key insights into market demand and supply patterns for data center markets, business landscape, regulatory impact and investment returns. The research aims to provide potential investors and stakeholders with the latest information on the data center market in the SSA region.

This country review is based on our assessment of information and data as available to our research. It is further underpinned by our understanding of the marketplace along with market data and insights collected through continuous research. The numbers and estimates in this report are derived from a mix of sources, including estimates from Xalam Analytics' economic models, data providers, regulator data and other sources as may be indicated.

This report is prepared with funds from the Data Governance in Africa Initiative, a project financed by the European Union, Germany, Belgium, Estonia, Finland and France under the Digital for Development (D4D) Hub. Its contents are the sole responsibility of Xalam Analytics and do not necessarily reflect the views of the funders.

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XALAM FRONTIER MARKETS

The Togo data center investment case

Data center development is a key component in a government push to transform a small, dynamic economy into a West Africa digital hub

THE OPPORTUNITY

- One of the West Africa's smaller economies, Togo is also **one of the most dynamic in the region**.
- **A West Africa financial services hub.**
- **The Togo digital strategy 2025 aims to accelerate the deployment of digital infrastructure** and the broader adoption of digital applications in the country, digitize public and social services and transform Togo into a digital hub.
- Togo is **witnessing a strong expansion of its digital infrastructure**. Broadband penetration relatively high, at ~53%, above the African median, FTTH penetration is one of the highest in West Africa – and growing.
- **Togo is the only West Africa landing point for a Google cable** outside of Nigeria over the medium term.

CHALLENGES & RISKS

- One of the smallest economies in West Africa.
- **Scale of demand is relatively small**, <5MW.
- **Tight electricity supply**; half of Togo's supply is imported from neighboring countries.
- **Power prices are relatively high**, >$0.25/kWh.
- **Concentrated fiber market** and relatively high bandwidth costs.

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Togo data center market overview

Estimates as of 2024

~3
Live DC facilities

0.5MW
Live critical IT load (1)

0.5MW
Capacity in construction (2)

NA
Long term pipeline (3)

~2
Facilities in construction or in pipeline

~55%
Facility occupancy (4)

$1m
Annual Commercial Data Center Revenue

30%
Data center market CAGR (2024-30)

(1)Capacity that is active, under lease or readily available for lease by third-party customers.
(2)IT load capacity from facilities currently in construction; construction has broken ground; ongoing civil works, installation and commissioning phases are in progress.
(3)Facilities explicitly announced or listed as in development. Some execution phases have been initiated (e.g. land control, energy supply commitments, etc.), but no actual civil works have been undertaken. Capacity expected to be available by the end of 2030.
(4) Percent of available capacity that is effectively being used by third party customers.
Sources: Xalam Analytics estimates, provider data

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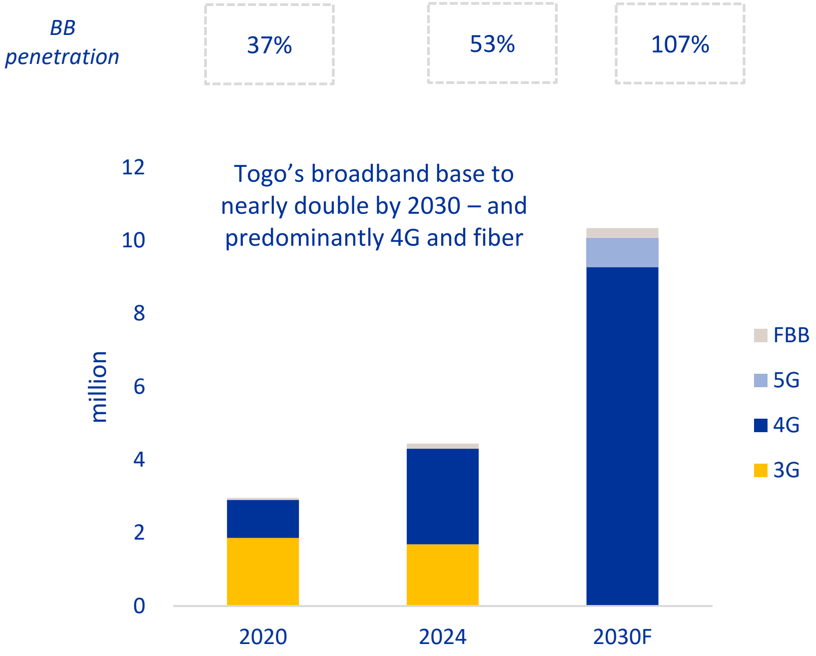
Key drivers of demand for data centers

The government of Togo is looking to transform the country’s economy through investment in infrastructure and a host of actions designed to attract more private sector investment.

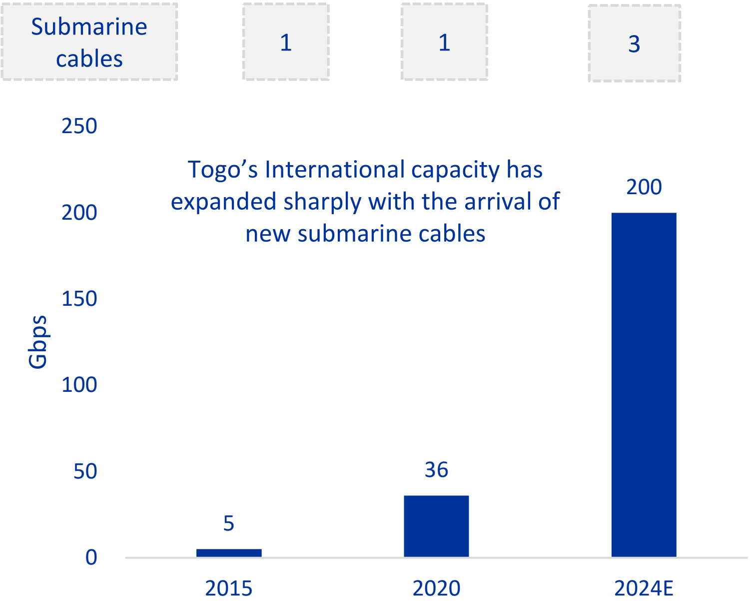
A growing digital customer base
- Togo broadband connections by type - million



A stable economy, with moderate inflation
Sample Togo economic indicators - 2024

~$10bn GDP	**5.3%** Real GDP growth
53% Broadband penetration	**3.3%** Annual inflation

Accelerated digital infrastructure build
Togo international Internet bandwidth – Gbps



Sources: IMF, INSEE, ARCEP and provider data, Google Equiano impact assessment, Xalam Analytics estimates

Data center market conditions

Togo’s data center operating environment is gradually improving, but constraints remain

Fiber Market

- Togo has a concentrated international capacity market; Togocom controls the WACS cable; SIN controls the Equiano cable (with management outsourced to Csquared Woezon, a joint-venture with Csquared), Moov controls its MT West Africa cable.
- The telcos (Togocom and Moov) are primarily focused on their own needs; Equiano capacity is offered on an open access basis.
- Long a monopoly, the terrestrial segment is gradually opening; Csquared Woezon offering terrestrial links to the Equiano CLS and Lome data center, along with terrestrial connectivity to neighboring countries.
- Togo is emerging as a connectivity hub, providing diversity routes to Ghana, Benin and Burkina Faso.
- The ICT regulator has been taking steps to bring down relatively high wholesale fiber capacity prices.

Electricity Market

- Togo has a power generation capacity of around 400MW, of which around half is imported from Ghana and Nigeria
- Renewable contribution was around 41% in 2024, including ~30% from solar sources of power; government targets ~50% from renewables by 2030.
- Electricity prices are relatively high - $0.25/kWh.
- Self-generation of solar energy is allowed, subject to regulatory authorization.

Data privacy & hosting regulations

- The Togo digital strategy 2025 includes 9 structuring programs that would accelerate the deployment of digital infrastructure and the broader adoption of digital applications in the country, digitize public and social services and transform Togo into a digital hub.
- The National Assembly passed the Data Protection Law in 2019.
- The law set up a data protection agency.
- Transfer of personal data outside of Togo is prohibited unless there is formal authorization.

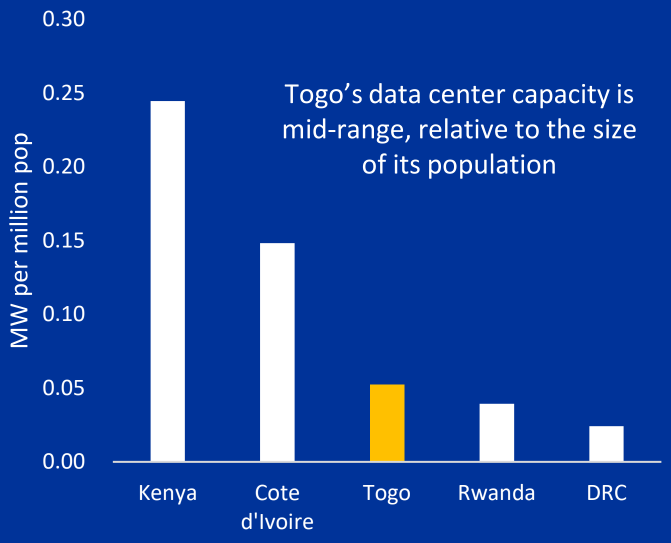
State of data center supply

Togo’s data center capacity is still small, but gradually expanding

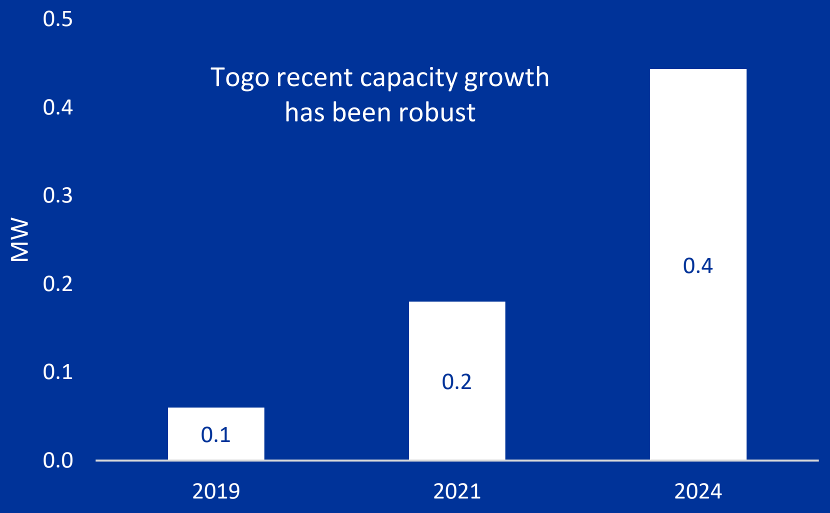
Togo data center supply – 2024E
Sample market indicators (1)

~3 Live commercial DC facilities	**~0.5MW** Live IT load
1MW Potential/Full-build IT load (2)	**~60%** % of supply that is carrier-neutral

Togo vs. Sub-Saharan Africa peers
Critical IT load – MW per million population



Togo data center market – evolution of live supply
Critical IT load - in MW



(1)Numbers are rounded up (2) Potential/Full-build load is facility capacity assuming that all phases of development have been completed. Additional CapEx would be needed to make the residual capacity operational.
Sources: Xalam Analytics estimates, provider data

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Togo facility mapping – Lome metro

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Key data center market players

The Togolese market is dominated by a largely state-owned, carrier-neutral facility

Telcos & Fiber Infracos

Groupe Togocom

CLOUD & RACKS DATACENTER

Focused on mobility and fiber - colocation is an adjacent opportunity.

Carrier-neutral

LDC Lomé Data Centre

The Lome Data Center (LDC) is the country's primary facility; it is owned by SIN (a state-owned enterprise) but operated on a carrier-neutral basis.

Mostly carrier-neutral

- The country's main facility, Lome data center is government-controlled but managed as carrier-neutral.
- Other facilities are small and hybrid, generally telco-managed.
- At least two new facilities are expected to come to market over the next few years, - but most initiatives remain at project development stage.

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GLOSSARY & KEY DEFINITIONS

Key definitions

Data center	While there are a variety of definitions for data centers, this market review is focused on commercial facilities , that is, facilities that lease colocation white space and power capacity to third-party customers on open, commercial terms, and in exchange for a fee. Captive facilities (bank data centers, telco switch sites and similar) are excluded from this assessment. Estimates focus on facilities at Tier II standard and above, unless otherwise indicated. Where applicable, these estimates include cloud hyperscaler self-built facilities.
Live critical IT load	Capacity that is active, under lease or readily available for lease.
Full build capacity	Data center facilities are typically built in phases; the full-build capacity is capacity assuming all potential phases of build have been completed and are live.
Capacity in construction	Facilities that have broken ground; ongoing civil works, installation and commissioning phases.
Pipeline	Facilities explicitly announced or listed as in development. Some execution phases have been initiated (e.g. land acquisition, power supply commitments, etc.), but no actual civil works have been undertaken.
Carrier-neutral	Facilities not specifically affiliated to a connectivity or cloud vendor, with capacity available to all third-party customers, on equal commercial terms, without explicit or implicit constraints or favoritism. This market review uses a loose definition for carrier-neutral, referring to facilities that are purely carrier-neutral, recognized by the market or effectively managed as such.

Glossary

Below are some of the key abbreviations used in this report

AI	Artificial Intelligence
ASN	Autonomous System Number
bn	billion
CAGR	Compound Annual Growth Rate
CapEx	Capital Expenditures
CDN	Content Delivery Network
Colo	Colocation
DC	Data Center
DIF	Digital Investment Facility
EAC	East African Community
EU	European Union
F	Forecast
FBB	Fixed Broadband
FDI	Foreign Direct Investment
FX	Foreign Exchange
GDP	Gross Domestic Product
GDPR	General Data Protection Regulation
ICT	Information, Communications and Technology
ISP	Internet Service Provider
IPP	Independent Power Producer
IT	Information Technology

kW	Kilowatt
kWh	Kilowatt Hour
LLM	Large Language Models
m	million
MNC	Multinational Corporation
MNO	Mobile Network Operator
MRR	Monthly Recurring Revenue
MSP	Managed Service Provider
MW	Megawatts
NDC	National Data Center
OEM	Original Equipment Manufacturer
POP	Point of Presence
PUE	Power Usage Effectiveness
RFS	Ready For Service
SEZ	Special Economic Zone
SSA	Sub-Saharan Africa
USD	US dollar
PUE	Power Usage Effectiveness
RFS	Ready For Service
SSA	Sub-Saharan Africa
YE	Year end

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