



2026, A YEAR OF CRISIS AND CONVERGENCE

Enabling Africa's Telecommunications Future

A year of dramatic shifts in Africa's energy landscape has reshaped the outlook for telecommunications infrastructure across the continent. From South Africa's remarkable grid recovery to Sudan's war-driven energy collapse, the 2026 edition of our annual ranking captures a continent in accelerating transition.

In our 2025 edition, we highlighted that energy costs account for a quarter to a third of telecom operators' total operating expenses, and that grid reliability varies dramatically across the continent. One year later, these dynamics have intensified. The gap between energy-secure and energy-insecure markets is widening, driven by three forces: an unprecedented boom in solar deployment, climate-induced disruptions to hydropower systems, and the devastating impact of armed conflict on energy infrastructure.

This 2026 update presents our revised energy readiness rankings for 54 African nations, documents the key changes from the prior year, and explores the strategic implications for telecommunications providers operating across the continent.

KEY FIGURES AT A GLANCE

4.5 GW

Solar capacity
added across
Africa in 2025

273 days

Consecutive
days without load
shedding in South
Africa

40%

Of Sudan's
generation
capacity lost to
conflict

\$200B+

Transmission
investment needed
across Africa by
2040



What changed in 2026

Our 2026 assessment identified 26 sub-score changes across 17 countries — roughly one in three nations experienced a material shift in at least one dimension of energy readiness. Fifteen sub-scores improved while 11 declined. The net effect is a modest upward drift in the continental average, from 49.3 to 50.1 out of 100, but this masks significant divergence at the country level.

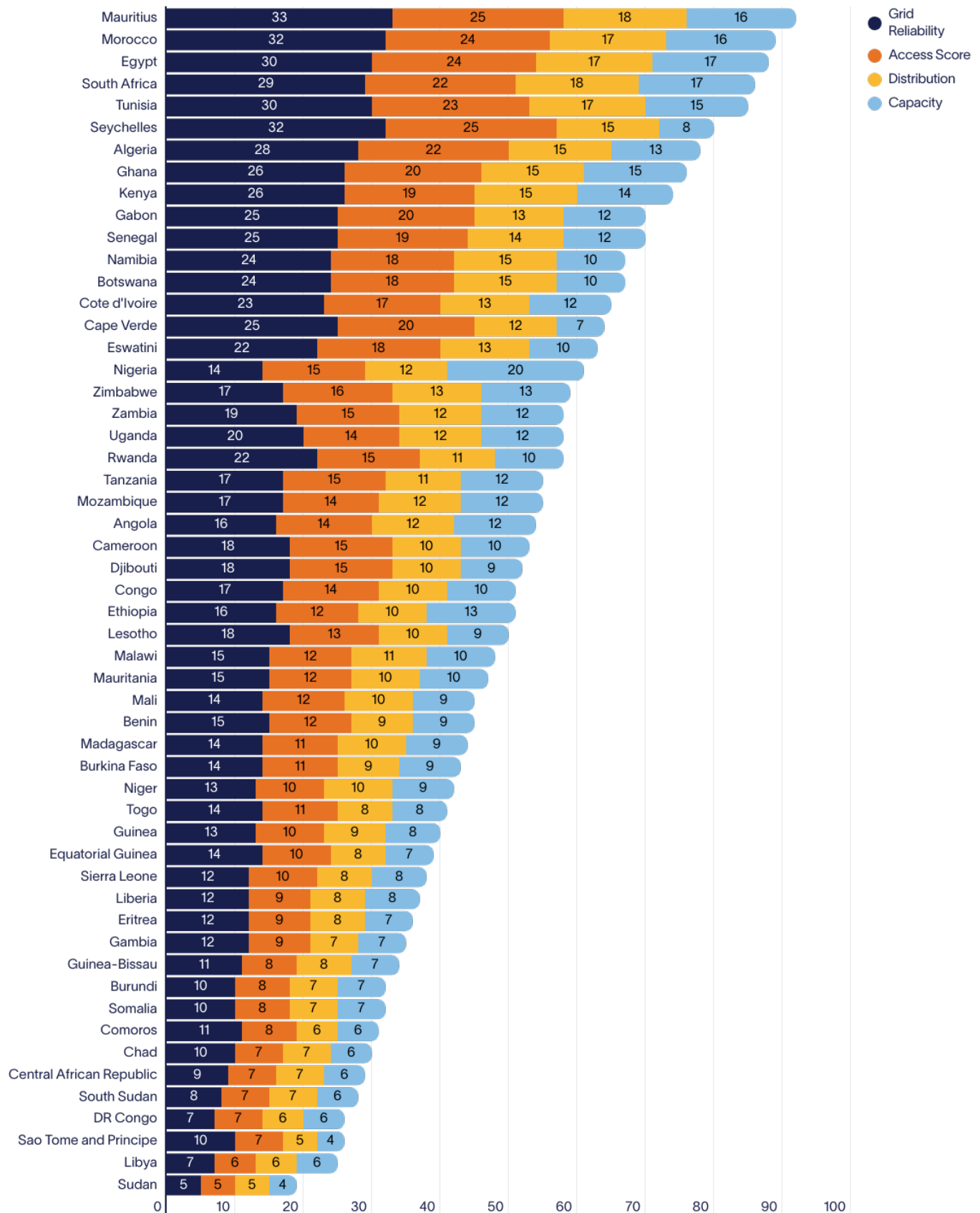
The most dramatic movement belongs to South Africa, which gained four points to reach 86, overtaking Tunisia to claim fourth position. Egypt also rose four points to 88, consolidating its position as the continent's third-ranked market. At the other extreme, Sudan fell five points to 19, reflecting the toll of its ongoing civil war on energy infrastructure.

Year-over-Year Readiness Score Changes

Country	2025 Score	2026 Score	Change	Direction
Egypt	84	88	4	▲ Upgrade
South Africa	82	86	4	▲ Upgrade
Kenya	72	74	2	▲ Upgrade
Senegal	68	70	2	▲ Upgrade
Ethiopia	49	51	2	▲ Upgrade
Morocco	88	89	1	▲ Upgrade
Ghana	75	76	1	▲ Upgrade
Botswana	66	67	1	▲ Upgrade
Rwanda	57	58	1	▲ Upgrade
Nigeria	62	61	-1	▼ Downgrade
Zimbabwe	60	59	-1	▼ Downgrade
Zambia	59	58	-1	▼ Downgrade
Tanzania	56	55	-1	▼ Downgrade
Mali	46	45	-1	▼ Downgrade
Burundi	33	32	-1	▼ Downgrade
DR Congo	27	26	-1	▼ Downgrade
Sudan	24	19	-5	▼ Downgrade

The ranking evaluates energy readiness across four factors: grid reliability (35 pts), industrial/urban access (25 pts), distribution infrastructure (20 pts), and overall capacity (20 pts).

Energy Ranking for Telecommunications in Africa



Source: Altman Solon, IEA, World Bank, African Development Bank, IRENA, Regional African Power Pools (SAPP, WAPP, EAPP).

Country case studies

South Africa: from crisis to recovery

One of the most significant developments in Africa's energy landscape over the past year has been South Africa's dramatic grid recovery. After years of crippling load shedding that cost the economy an estimated R3 trillion (\$180 billion) since 2009, the country has achieved a remarkable turnaround through its Generation Recovery Plan.

By February 2026, **Eskom reported 273 consecutive days without interruption to the electricity supply**, with only 26 hours of load shedding recorded during the entire financial year. The Energy Availability Factor rose to 65%, while unplanned outages were halved year-on-year, declining from 13.4 gigawatts (GW) to 8.1GW. Diesel expenditure fell by over 43%, saving billions of rands.

For telecom operators, this transformation is significant. Tower companies and network providers that invested heavily in diesel backup and battery systems during the load-shedding crisis can now reduce their dependence on expensive backup power. However, operators should approach this recovery with measured optimism; South Africa's aging coal fleet remains vulnerable, and the long-term transition to renewables is still underway.

Perhaps most notably, the private sector's response to the crisis has permanently altered the energy landscape. An estimated 1.6 gigawatts (GW) of new solar capacity was added in 2025, much of it through distributed installations by businesses and households. This [behind-the-meter](#) generation has reduced demand on the national grid and created a more resilient, decentralized energy ecosystem that telecom operators can leverage.

Egypt: the solar powerhouse accelerates

Egypt continues to consolidate its position as North Africa's energy leader. The government's aggressive investment program targets 99.8% electricity coverage while adding 3,000 MW of new solar generation capacity and 600 MW of battery storage ahead of the 2026 summer peak. At a realistic capacity factor of ~23% for utility-scale solar in Egypt, this translates to approximately 6 billion kWh of additional annual generation. This is a meaningful 2.6% uplift on the country's current base of 235 billion kWh, which has itself grown from 229 billion kWh two years prior¹.

1. Capacity factor assumes ~23% utilization rate, consistent with IRENA benchmarks for utility-scale solar PV in North Africa.

For telecom operators, Egypt offers one of the most favorable energy environments on the continent: competitive industrial tariffs around \$0.05 per kilowatt-hour, near-universal grid coverage, and a government committed to grid modernization. The combination of reliable supply and falling solar costs makes Egypt an increasingly attractive market for data center investment and network expansion.

Sudan: conflict destroys energy infrastructure

At the opposite end of the spectrum, Sudan's ongoing civil war has devastated the country's already fragile energy infrastructure. Attacks have crippled power plants, transformers, transmission lines, and fuel depots. **As of 2025, approximately 40% of Sudan's generation capacity had been destroyed, plunging millions into darkness.**

The war has compounded pre-existing challenges. Even before the conflict, per capita electricity consumption stood at just 0.294 Megawatt-hour — less than one-tenth of the global average. Mass displacement to remote areas with no grid infrastructure has further strained the system. For telecom operators, Sudan now represents a near-total off-grid environment requiring full self-generation at every site.

Climate vulnerability exposed

A severe drought across Southern and Eastern Africa has exposed a critical vulnerability: over-reliance on hydropower. Zambia and Zimbabwe, which share the Kariba Dam, have both seen significant reductions in hydro output, forcing a return to load shedding. Tanzania suffered infrastructure damage from Cyclone Dikeledi, while Burundi and the DR Congo experienced reduced output from the Ruzizi hydroelectric plant.

These climate-driven disruptions reinforce a key message for telecom operators: Hybrid energy solutions that diversify beyond a single fuel source are essential for operational resilience.



Nigeria: the reliability gap widens

Despite being Africa's largest telecom market, Nigeria's grid reliability continues to deteriorate. Research found that grid-connected residents experience an average of 160 days of blackout per year— meaning they go without power approximately 40% of the time. Some surveys report over 32 outages per month.

A private-sector solar boom is underway: Nigeria added 803 MW of solar capacity in 2025, driven by the simple economics of displacing diesel generators. For telecom tower operators, solar-diesel hybrid systems with battery storage remain the most viable path to reliable, cost-effective power.

Looking ahead: five trends for 2027

The future of telecom energy in Africa will be shaped by five key trends:

- 1 Grid-edge intelligence scales beyond pilots.** Smart meters, AI-driven analytics, and predictive maintenance are moving from pilot to production. Operators who invest in real-time energy management will capture the next wave of efficiency gains.
- 2 Battery storage reshapes economics.** As lithium-ion costs continue to decline, battery storage is becoming viable for telecom towers even in markets with reasonable grid access, enabling arbitrage between peak and off-peak tariffs.
- 3 Energy-as-a-Service scales up.** Third-party energy providers are increasingly offering managed solutions for tower portfolios, allowing operators to shift energy from CapEx to OpEx while benefiting from specialized expertise.
- 4 Climate resilience drives diversification.** The 2025 drought's impact on hydro-dependent markets will accelerate the shift toward diversified generation mixes, particularly solar-battery combinations that reduce exposure to weather variability.
- 5 Continental grid integration begins.** The AU's 10-Year Infrastructure Investment Plan for Cross-Border Interconnectivity (2026–2036), combined with regional power pool coordination, will gradually enable electricity trading that benefits telecom operators in border regions.

Conclusion: a widening divide

The 2026 rankings tell a story of accelerating divergence. The top tier of African energy markets is pulling further ahead, driven by grid recovery in South Africa, sustained investment in Egypt, and solar deployment across North and West Africa. At the same time, conflict, climate shocks, and chronic underinvestment are dragging the bottom tier deeper into crisis.

For telecommunications operators, the strategic implications are clear. In advanced markets, the opportunity is to capitalize on improving grid conditions and falling renewable costs to lock in structural cost advantages. In transitional markets, hybrid energy systems and Energy-as-a-Service partnerships offer a path to reliability that the grid alone cannot yet provide. And in the most challenging environments, the ability to operate independently of the grid — through solar, battery storage, and intelligent energy management — is no longer a differentiator but a prerequisite for doing business.

The broader picture, however, is one of untapped potential. Africa added 4.5 GW of solar in a single year, yet the continent still accounts for less than 3% of global grid infrastructure. The generation is coming; the distribution is not. Closing that gap — through cross-border interconnection, transmission investment, and regulatory reform — will determine whether Africa's telecom sector can scale to meet the demands of 1.4 billion people who increasingly expect always-on connectivity.

The operators, investors, and policymakers who treat energy not as a fixed cost but as a strategic variable will be the ones who shape the next decade of African telecommunications.



Appendix

Complete 2026 Ranking

The table below presents the full energy readiness scores for all 54 African nations, broken down by the four weighted factors. Year-over-year changes reflect movement from the 2025 baseline.

Tier Classification:

Advanced (80–100)

Developing (60–79)

Transitional (45–59)

Challenging (30–44)

Critical (0–29).

YoY shows total score change from 2025 edition.

Country	Grid Reliability	Access Score	Distribution	Capacity	Total Score	YoY	Tier
Mauritius	33	25	18	16	92	—	Advanced
Morocco	32	24	17	16	89	+1	Advanced
Egypt	30	24	17	17	88	+4	Advanced
South Africa	29	22	18	17	86	+4	Advanced
Tunisia	30	23	17	15	85	—	Advanced
Seychelles	32	25	15	8	80	—	Advanced
Algeria	28	22	15	13	78	—	Developing
Ghana	26	20	15	15	76	+1	Developing
Kenya	26	19	15	14	74	+2	Developing
Gabon	25	20	13	12	70	—	Developing
Senegal	25	19	14	12	70	+2	Developing
Namibia	24	18	15	10	67	—	Developing
Botswana	24	18	15	10	67	+1	Developing
Cote d'Ivoire	23	17	13	12	65	—	Developing
Cape Verde	25	20	12	7	64	—	Developing
Eswatini	22	18	13	10	63	—	Developing
Nigeria	14	15	12	20	61	-1	Developing
Zimbabwe	17	16	13	13	59	-1	Transitional
Zambia	19	15	12	12	58	-1	Transitional
Uganda	20	14	12	12	58	—	Transitional
Rwanda	22	15	11	10	58	+1	Transitional
Tanzania	17	15	11	12	55	-1	Transitional
Mozambique	17	14	12	12	55	—	Transitional
Angola	16	14	12	12	54	—	Transitional
Cameroon	18	15	10	10	53	—	Transitional
Djibouti	18	15	10	9	52	—	Transitional
Congo	17	14	10	10	51	—	Transitional
Ethiopia	16	12	10	13	51	—	Transitional
Lesotho	18	13	10	9	50	+2	Transitional
Malawi	15	12	11	10	48	—	Transitional
Mauritania	15	12	10	10	47	—	Transitional
Mali	14	12	10	9	45	-1	Transitional
Benin	15	12	9	9	45	—	Transitional
Madagascar	14	11	10	9	44	—	Challenging
Burkina Faso	14	11	9	9	43	—	Challenging
Niger	13	10	10	9	42	—	Challenging
Togo	14	11	8	8	41	—	Challenging
Guinea	13	10	9	8	40	—	Challenging
Equatorial Guinea	14	10	8	7	39	—	Challenging
Sierra Leone	12	10	8	8	38	—	Challenging
Liberia	12	9	8	8	37	—	Challenging
Eritrea	12	9	8	7	36	—	Challenging
Gambia	12	9	7	7	35	—	Challenging
Guinea-Bissau	11	8	8	7	34	—	Challenging
Burundi	10	8	7	7	32	-1	Challenging
Somalia	10	8	7	7	32	—	Challenging
Comoros	11	8	6	6	31	—	Challenging
Chad	10	7	7	6	30	—	Challenging
Central African Republic	9	7	7	6	29	—	Critical
South Sudan	8	7	7	6	28	—	Critical
DR Congo	7	7	6	6	26	-1	Critical
Sao Tome and Principe	10	7	5	4	26	—	Critical
Libya	7	6	6	6	25	—	Critical
Sudan	5	5	5	4	19	-5	Critical

Leadership & Oversight



Björn Menden

Partner

Bjoern.Menden@altmansolon.com



Doug Barnett

Partner

Doug.Barnett@altmansolon.com



Kabilan Sukumar

Associate Partner

kabilan.sukumar@altmansolon.com

© 2026 Altman Solon US LP All Rights Reserved.

No part of this publication may be copied, reproduced, distributed, published, displayed, modified, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of Altman Solon. We invite you to tell others about Altman Solon products and services by directing them to our website at www.altmansolon.com.

Disclaimer

This publication is for informational and illustrative purposes only. Altman Solon makes no representations or warranties, and has no duties or liabilities, with respect to or arising from this publication, all of which are expressly disclaimed.

Office Locations

San Francisco



Boston



New York



London



Paris



Zurich



Warsaw



Amsterdam



Munich



Los Angeles



Mexico City



São Paulo



Stockholm



Milan



Dubai



Riyadh



Singapore



Sydney

Altman Solon is the leading
global strategy firm focused on
telecommunications, media,
and technology.

