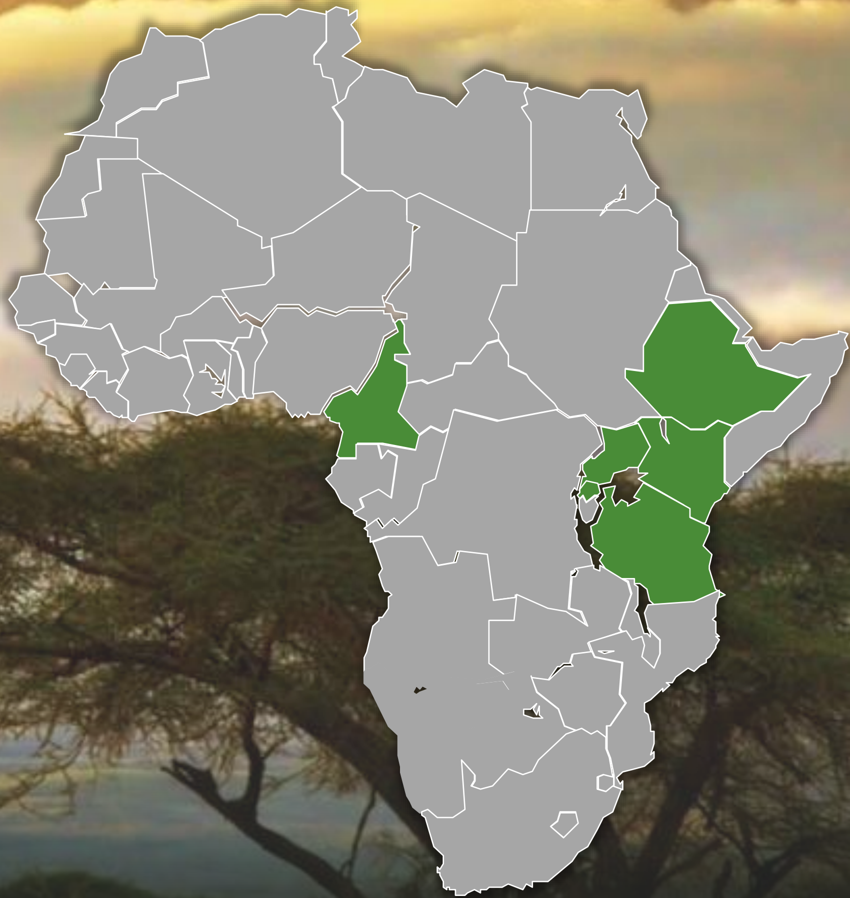
ABRIDGED VERSION

2026 AFRICA

GBS BENCHMARKING & MARKET REPORT



GBS.WORLD
THE WORLD SOURCE MARKETPLACE FOR GLOBAL BUSINESS SERVICES

G:ENESIS GLOBAL BUSINESS SERVICES

EAST & CENTRAL AFRICA

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GLOSSARY

BPO (Business Process Outsourcing)	Contracting non-primary business activities like customer service or payroll to a third-party provider.
GBS (Global Business Services)	An umbrella term for outsourcing functions including customer service, IT, HR, finance, etc.
Impact Sourcing	A recruitment model that intentionally employs socioeconomically disadvantaged individuals to deliver high-quality services to domestic and international clients
ITO (IT Outsourcing)	Outsourcing of IT functions like helpdesk, software development, or systems management.
Monthly Ramp-speed	The estimated rate at which new employees can be hired and trained for operations.
Tax Holiday	A government incentive that offers a temporary reduction or elimination of tax..
Total Addressable Talent Pool (TATP)	the number of qualified unemployed youth (ages 18–35) and unemployed graduates who are potentially employable within the GBS sector.
B2 English-speaking Talent Pool (BESTP)	The subset of the Total Addressable Talent Pool with English proficiency at B2 level or higher.

Abstract

This report benchmarks the Global Business Services (GBS)* landscape across six East and Central African markets, including Cameroon, Ethiopia, Kenya, Rwanda, Tanzania, and Uganda, assessing competitiveness, service maturity, talent availability, cost structures, and enabling environments.

While Africa's share of the global outsourcing workforce remains small, East and Central Africa is emerging as a high-potential frontier, driven by strong demographics, improving digital infrastructure, and sustained cost competitiveness. Drawing on recent diagnostics and benchmarking data, the report highlights key regional trends and provides evidence-based insights to inform investment decisions, policy development, and ecosystem growth through 2025 and beyond.

Research Objectives

The primary objective of the study is to provide a comprehensive benchmarking and diagnostic analysis of the GBS sectors across East and Central African countries: Cameroon, Ethiopia, Kenya, Rwanda, Tanzania, and Uganda. The analysis is designed to evaluate each country's readiness and attractiveness as a GBS delivery location, which includes the following objectives:

- **Benchmark regional GBS readiness**
- **Assess market attractiveness for GBS delivery**
- **Evaluate domestic and export-oriented activity**
- **Incorporate socio-economic dimensions**
- **Provide evidence-based insights to support decision-making**

Key Evaluation Themes and Comparative Focus

To enable consistent and comparable assessment across the six countries, the benchmarking framework focuses on the following **core evaluation themes**:

- **Talent and workforce scale** — Addressable and B2-level English-speaking talent, youth participation.
- **Market size and service maturity** — Domestic vs. international delivery and service breadth.
- **Cost efficiency** — Fully loaded monthly costs for CX and selected IT roles.
- **Infrastructure readiness** — Digital connectivity, telecoms, and commercial real estate
- **Inclusion and social impact** — Impact sourcing, gender participation, workforce diversity.
- **Relative competitiveness** — Global benchmarks on talent, business environment , and ICT readiness.

*In the context of this report, GBS includes business process outsourcing (BPO) and IT outsourcing (ITO)

Methodology

Data Sources and Research Approach

The full and comprehensive Africa GBS Benchmarking & Market Data Bank utilizes a multi-method approach, combining primary data collection with secondary validation. Primary data is obtained through over 780 structured profiling surveys and interviews conducted with GBS operators, delivery centers, and sector stakeholders across 26 African countries.

Secondary data was drawn from a combination of:

- Publicly available sources (e.g., World Bank, Statista, ILO, ITU).
- Previous GBS industry reports and demand-side analyses produced by Genesis.
- Internal databases maintained by Genesis GBS (the lead authors of the report).

The methodology supports both quantitative benchmarking and qualitative insights into sector dynamics and policy environments.

Interview and Survey Inputs

Data collection included:

- Surveys targeting existing and prospective GBS service providers.
- Structured interviews with national investment promotion agencies, telecom regulators, industry associations, and select multinational clients.
- Cross-validation with operator-provided data on workforce size, salary structures, ramp-up capacity, and service portfolios.

The survey instruments captured detailed metrics on language capabilities, cost profiles, infrastructure quality, and human capital.

Benchmarking Parameters

Key benchmarking parameters included:

- Estimated GBS market size (US$).
- Total and B2 English-speaking talent pools.
- Monthly ramp-up potential of new hires.
- Fully loaded operational cost per FTE seat.
- Gender and youth participation in GBS.
- National infrastructure indicators (connectivity, office space, utilities).

Limitations

Key limitations included:

- Variability in data availability and reporting standards across countries.
- Potential underreporting or overestimation of workforce size by operators.
- Time-lag in public data sources (some indicators reflect the latest available data from 2021–2022).
- Exclusion of informal digital gig work or freelance platforms not affiliated with formal BPO operations.

Despite these limitations, the comparative benchmarking provides a credible, data-driven foundation for assessing Africa's GBS readiness and competitiveness.

Executive Summary

East and Central Africa are emerging as a credible and increasingly differentiated cluster within the Global Business Services (GBS) landscape. Across the six profiled countries, Kenya, Ethiopia, Rwanda, Uganda, Tanzania, and Cameroon, **the region supports an estimated 113,000 GBS workers and generates over US$1.6 billion in market value**, servicing a mix of domestic, regional, and international demand. While these markets remain smaller than mature global hubs, they are gaining relevance as complementary delivery locations within diversified global sourcing portfolios, offering structural cost advantages, young multilingual talent, and improving digital and investment environments.

From Latent Potential to Active Market Participation

The region has moved beyond early-stage experimentation toward structured participation in global service delivery. Kenya remains the most mature market within the East and Central African region, with a diversified, export-oriented CX and IT-enabled services base. Rwanda and Uganda have developed focused export capabilities despite a smaller scale, while Ethiopia offers significant long-term labor potential constrained by current skills readiness and regulatory complexity. Tanzania and Cameroon remain largely domestically oriented but are gradually strengthening enabling fundamentals.

Demand Alignment and Service Mix Evolution

East and Central Africa are increasingly aligned to global demand for cost-competitive English- and French-speaking CX delivery. More advanced markets, notably Kenya and Rwanda, are beginning to diversify into digital CX and selected IT-enabled services, while others are building foundational capabilities to support future upgrading.

Talent as the Core Competitive Asset

The region's primary structural advantage is its youthful demographics, with over 65% of the population under 35. However, export scalability is constrained by the availability and replenishment rate of B2-level English-speaking talent, rather than overall labor supply. Kenya anchors the regional scale, while Rwanda offers a smaller but highly export-ready bilingual workforce. Mid-level and specialist skills remain limited across all markets, reinforcing the importance of demand-led skilling and impact sourcing as scalable growth levers aligned with ESG priorities.

Infrastructure, Investment Climate, and Policy Enablement

Digital infrastructure and investment environments have improved across the region, with Kenya and Rwanda leading in readiness and coordination, and Uganda and Tanzania making steady progress. For investors and operators, success increasingly depends on portfolio-based location strategies that align specific markets to distinct delivery roles. For policymakers and ecosystem enablers, the next phase of growth requires deeper skills development, stronger ecosystem coordination, and enhanced regional visibility.

Outlook

East and Central Africa are no longer peripheral to the global GBS conversation. While challenges remain, particularly around skills depth, risk, and international visibility, the region has established a credible foundation for sustained participation in global service delivery. Countries that successfully combine talent development, digital infrastructure, and coordinated ecosystem action will be best positioned to capture the next wave of diversified, resilient global demand.

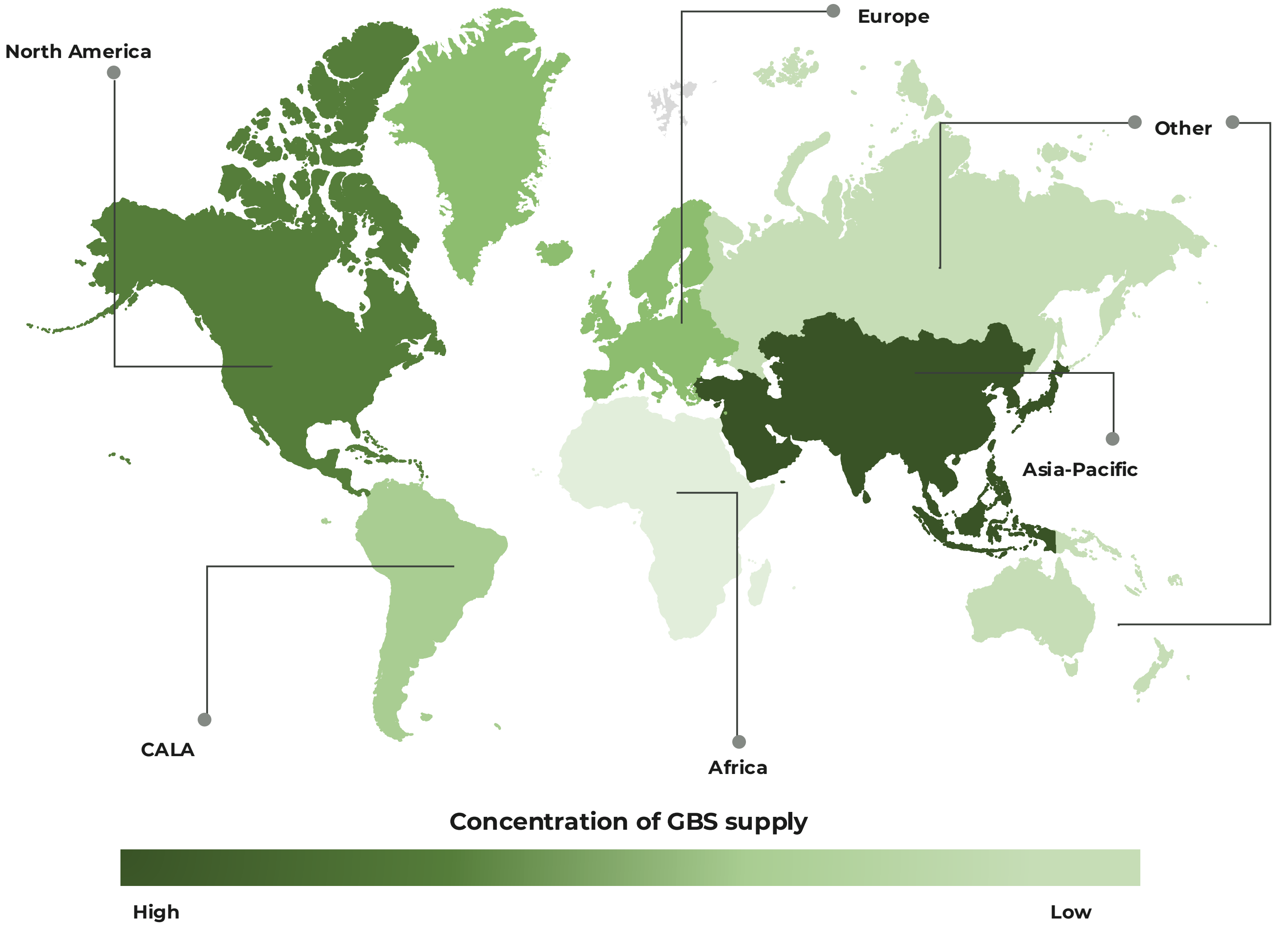
This abridged report provides a data-driven snapshot of where the region stands today and how stakeholders can engage with its evolving GBS landscape in a deliberate, strategic, and differentiated manner.

1. The Global GBS Context

The global GBS market continues to expand as enterprises pursue cost efficiency, digital transformation, operational resilience, and access to diverse talent pools. **Valued at approximately US$1.1 trillion in 2024, the global outsourcing market is projected to reach US$1.5 trillion by 2027**, reflecting sustained demand for scalable, multi-location service delivery models.

From a supply-side perspective, outsourcing activity remains concentrated in a small number of mature regions. The Asia-Pacific region accounts for the majority of global delivery, followed by North America, Europe, and the UK, collectively representing over 80% of the global GBS supply. The Caribbean and Central America (CALA) region is an emerging contributor, largely driven by nearshore demand from North America, while **Africa currently accounts for approximately 2.8% of global supply**.

Figure 1: Global Supply-side Outsourcing Delivery Concentration, by Region



Source: Genesis GBS, 2025

Despite its small base, Africa represents one of the fastest-growing outsourcing regions globally. The continent's GBS sector is **forecast to grow at an estimated CAGR of 22% between 2024 and 2027**, materially outpacing global market growth of 8.17% over the same period.

Within this global landscape, Africa's relevance lies less in its current scale and more in its trajectory and structural role within diversified global sourcing strategies. The continent is not a single outsourcing market, but a heterogeneous GBS ecosystem comprising locations at different stages of maturity, capability depth, and export orientation.

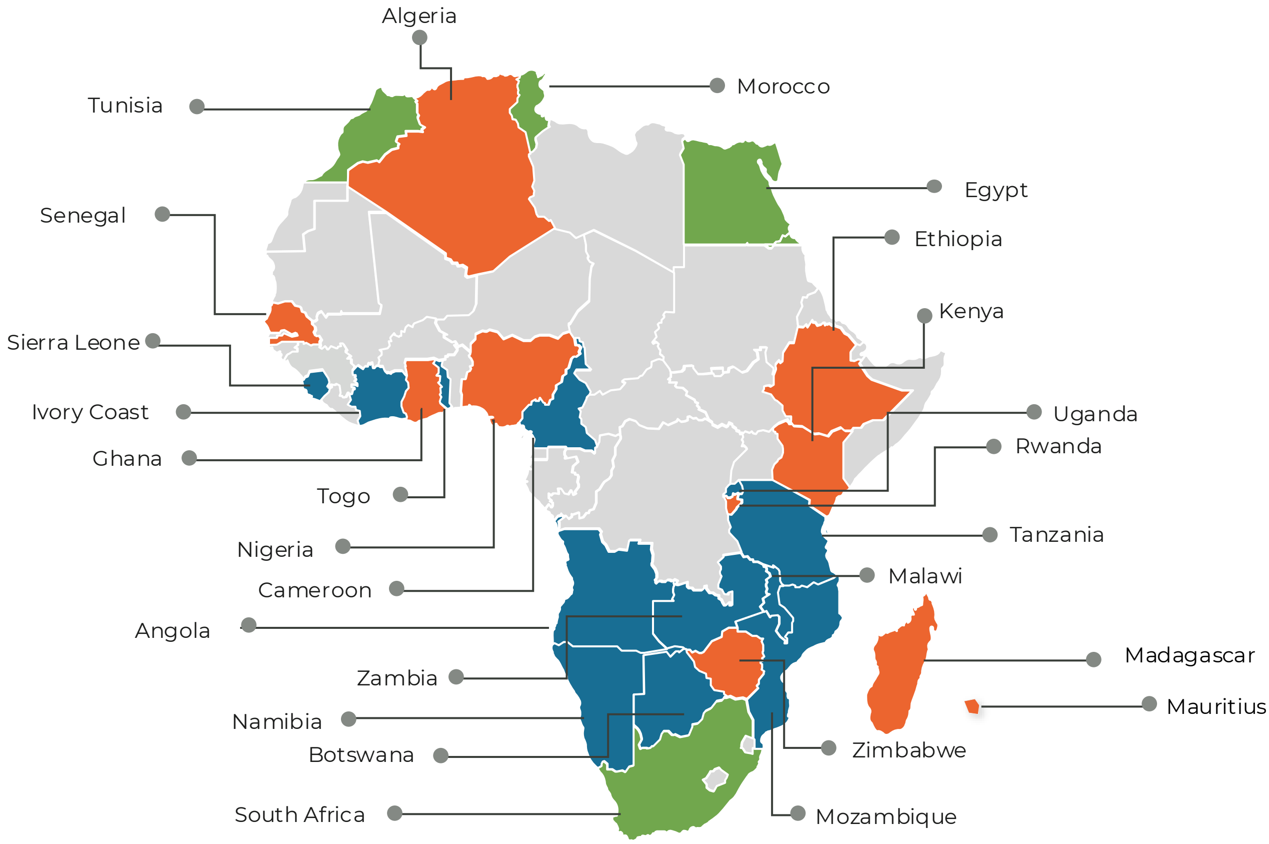
Understanding Africa's position, therefore, requires a continental view, clarifying how different countries contribute in distinct ways to Africa's overall GBS value proposition.

2. The African GBS Context

Africa's GBS sector is best understood as a maturity spectrum rather than a single market. While the continent currently represents a small share of global outsourcing supply, it comprises a diverse set of locations at different stages of development, shaped by varying levels of service capability, export orientation, and ecosystem maturity.

As illustrated in Figure 2, **mature markets**, such as **South Africa and Egypt**, anchor Africa's offshore GBS activity, supported by large-scale workforces, diversified service portfolios, and long-established delivery ecosystems. **Emerging markets**, including **Morocco, Nigeria, and Ghana**, combine growing domestic demand with increasing participation in international service delivery. **Nascent markets** across much of the continent remain largely domestically focused but are gradually building foundational capabilities for future offshore engagement.

Figure 2: African GBS Markets Graded by Maturity



Mature Market: Locations that have developed domestic IT and business process services markets and have captured offshore work that is more than 40% of the total domestic and international market value. These locations also have established 10+ year ecosystem coordination bodies.

Emerging Market: Locations that have growing domestic markets and have captured offshore work that exceeds 20% of total domestic and international market value.

Nascent Market: Locations that have started capturing some offshore work/or have developed domestic markets.

Source: Genesis GBS, 2025

Within this continental landscape, **East and Central Africa represents a cluster of predominantly emerging markets** that have progressed beyond early-stage domestic outsourcing and are now transitioning toward export-oriented GBS delivery. Understanding how this transition has occurred, and the factors that have shaped its pace and direction, provides the foundation for the analysis that follows.

3. East and Central Africa GBS Development

3.1 Evolution of GBS, CX, and ITO Services

The development of the GBS sector in East and Central Africa is a relatively recent phenomenon, with meaningful industry formation occurring primarily over the past 10-15 years. Unlike Africa's more mature outsourcing hubs, which emerged in the early 2000s, the region's entry into global services accelerated following foundational digital infrastructure investments, particularly the deployment of undersea fiber-optic cables along the East African coastline from around 2009 to 2010.

Since then, the sector has evolved in **three distinct but overlapping phases**, reflecting a gradual increase in service sophistication, client complexity, and integration into global delivery portfolios.

Figure 3: East and Central Africa's GBS Evolutionary Phases

Phase 1: Voice-Led Entry

- Early sector growth anchored in inbound/outbound customer support and basic back-office delivery, notably in **Kenya, Ethiopia and Rwanda**
- Initial client exposure is largely domestic and regional, with early international pilots in **Cameroon, Tanzania and Uganda**.
- Workforce dominated by entry-level, English-speaking talent, particularly in **Nairobi, Kigali and Kampala**.

Phase 2: Service Diversification

- Expansion into omnichannel CX and non-voice services, gaining traction in **Rwanda and Kenya**.
- Emergence of specialist business process services (F&A, HR, analytics).
- Growing traction with international clients, especially in Europe and the Middle East.
- Early vertical specialization in BFSI, telecoms, and retail.

Phase 3: Digital Transition

- Shift toward ITO, digital, and tech-enabled services, most evident in **Kenya, Ethiopia and Rwanda**.
- Expansion into IT support, application services, and data annotation.
- Alignment with global delivery, security, and compliance standards.
- Positioning as complementary hubs in multi-location portfolios.
- Increasing emphasis on scalability and value-added services.

Despite differing country-level trajectories, East and Central Africa have collectively progressed from nascent, domestically focused outsourcing toward an emerging multi-service GBS ecosystem that has moved beyond proof-of-concept and is increasingly integrated into global delivery networks.

3.2 Regional Growth Drivers

Regional GBS expansion has been driven by a reinforcing dynamic between **rising domestic and international demand for outsourced services and the growing availability of young, work-ready talent**. Together, these demand- and supply-side forces have enabled the region's transition from early-stage domestic delivery toward participation in global service networks.

Figure 4: Demand and Supply Dynamics Driving Regional GBS Growth

Demand-Side Drivers

Expanding **telecoms, BFSI, utilities, and public sector demand** drove early CX and IT services.

Domestic delivery built **operational scale and delivery discipline**.

Proven local models enabled **exposure to offshore demand**.

Kenya, Ethiopia, and Rwanda increasingly secured international CX and technical support work.

Supply-Side Drivers

Large, **underutilized youth workforce** supported entry-level GBS hiring.

Improved **training and digital literacy** expanded talent readiness.

Targeted work-readiness training bridged the education-to-employment gap.

Public–private skilling initiatives (notably in Kenya and Rwanda) reduced onboarding risk and enabled scale.

Supported by Other Sector Accelerators

Anchor investors and multinational GBS operators

Introduced export-grade operating standards, structured training, and global governance frameworks.

Enabling policy and infrastructure improvements

Digital connectivity, power reliability, and investment facilitation.

4. East & Central Africa GBS Sector Landscape

4.1 Market and Workforce Size

The GBS markets across East and Central Africa are characterized by markedly different scales and workforce structures, reflecting differing levels of service maturity, export orientation, and integration into global delivery networks. Collectively, the six profiled countries generate an estimated US$1.6 billion in market value and employ approximately 113,000 workers, though this aggregate conceals substantial structural variation.

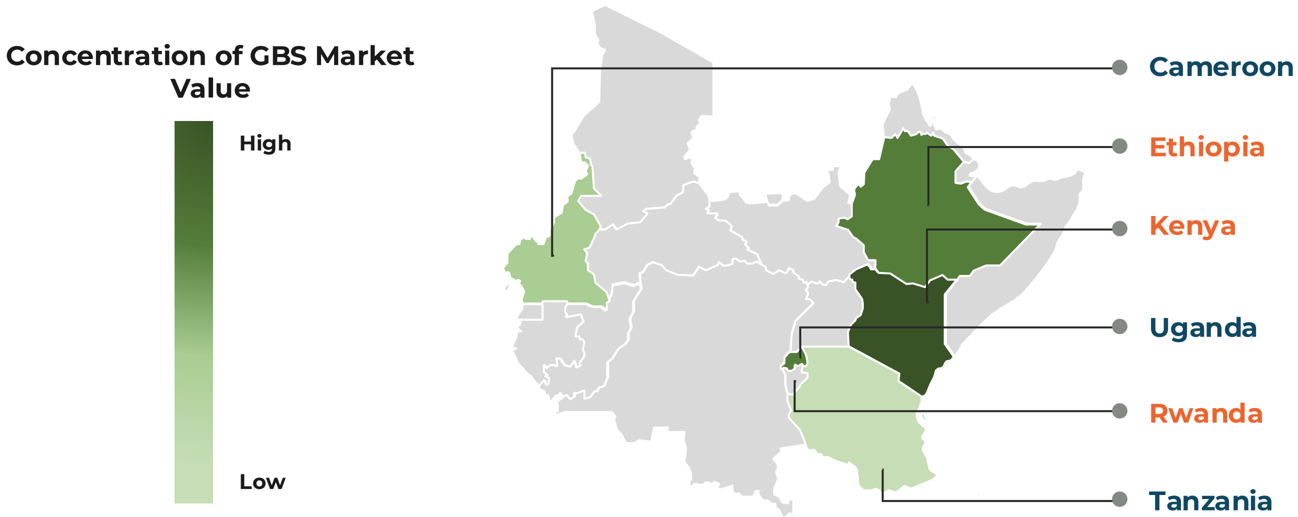
Kenya, the most mature market in the region, has built a sizeable and diversified GBS sector, with approximately 33% of its workforce serving international clients. This reflects Kenya's established position as an export-oriented destination for CX and IT-enabled services.

Rwanda shows a similar transition underway, with over a growing, diverse GBS workforce supporting international buyers, indicating progression beyond a purely domestic service model.

Ethiopia, has a large overall workforce base, focused primarily on domestic service delivery, but with a growing international workforce.

In **Cameroon, Uganda** and **Tanzania**, the majority of GBS employment remains domestically focused. However, the international-facing share is growing, signaling early export capability built on historically domestic-led sectors.

Figure 5: East and Central Africa GBS Market Values (US$ Millions)



4.2 Talent Composition

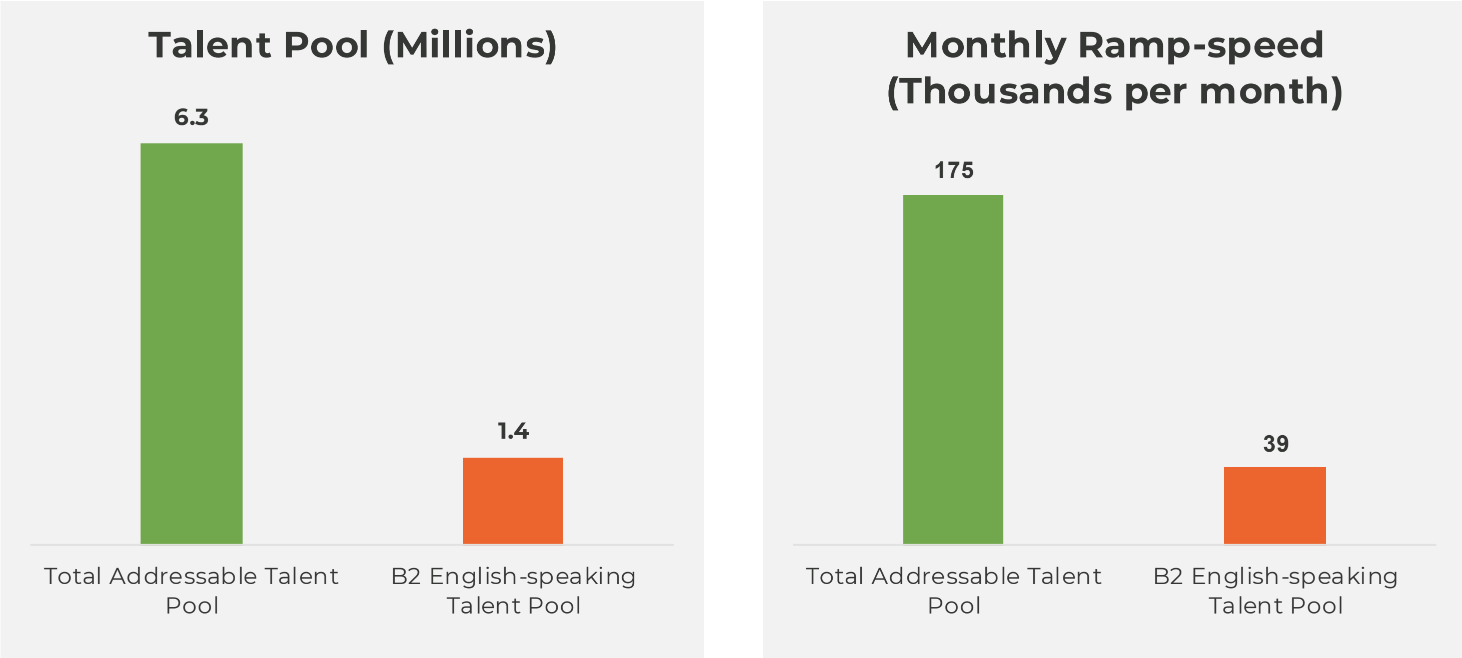
The GBS talent landscape across East and Central Africa is underpinned by a large, youthful labor base, with export readiness shaped less by absolute labor availability and more by language proficiency and the pace at which work-ready talent can be mobilized and scaled.

For this analysis, the Total Addressable Talent Pool (TATP) refers to the number of qualified unemployed youth (ages 18–35) and unemployed graduates who are potentially employable within the GBS sector.

Within this broader pool, the B2 English-Speaking Talent Pool (BESTP) represents the subset of the TATP with English proficiency at B2 level or higher, which is generally required for export-facing CX and IT-enabled services.

The monthly ramp-speed of the BESTP reflects the number of hires GBS firms can make per month without depleting the available export-ready talent pool.

Figure 6: Estimated East and Central Africa Total Addressable vs. B2-English-speaking Talent Pool



Within this regional context, countries contribute to talent depth in different ways:

- **Kenya** anchors regional scalability through deep education pipelines, strong English proficiency, and a mature operating environment that supports high-volume international delivery.
- **Rwanda**, though smaller in absolute terms, exhibits comparatively strong export readiness, underpinned by coordinated national skilling initiatives and close alignment between government, training providers, and industry.
- **Ethiopia** contributes a significant workforce scale, with export readiness increasingly enabled through structured language training and digital skills development.
- **Cameroon** contributes a differentiated bilingual talent pool, enabling English–French delivery models, albeit at a more controlled scale.
- **Uganda** demonstrates effective conversion of youth labor into export-ready talent, supported by a strong English-speaking base and growing operator maturity.
- **Tanzania** remains more domestically oriented, with export scalability constrained by narrower English-language readiness despite a large underlying labor pool.

However, it is important for investors and operators to note that the primary constraint is not the size of the regional labor pool, but the depth (adeptness) and replenishment rate of B2 English-speaking talent, which ultimately determines the feasible speed, scale, and sustainability of international GBS expansion across East and Central Africa.

4.3 Salary Benchmark

Salary levels across East and Central Africa reinforce the region's structural cost competitiveness, while also reflecting differences in market maturity, export orientation, and talent depth. Entry-level CX wages across the region are materially lower than in mature offshore and nearshore destinations, supporting 50-70% cost savings compared to operations in the US and Europe.

More mature markets, such as **Kenya and Rwanda**, command moderate wage premiums, reflecting stronger export orientation, deeper English-speaking talent pools, and higher productivity.

In contrast, **Ethiopia and Tanzania** offer significant cost arbitrage driven by large labor supplies and lower living costs, though international delivery often requires greater upfront investment in training and operational maturity.

Table 1: Average Monthly Contact Center Salary Comparison (US$)

Role	Cameroon			Ethiopia			Kenya			Rwanda			Tanzania			Uganda		
	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level
Agent Level Domestic	180	280	450	75	95	148	252	336	525	147	196	306	165	260	390	230	300	500
Agent Level International	200	300	470	95	148	195	336	525	620	245	326	510	185	277	435	300	500	590
Team Leader	380	460	635	150	200	313	629	838	1,309	495	660	1,031	330	420	631	420	698	1,071
Operations/CC Manager	650	780	1,100	270	360	563	1,102	1,469	2,295	1,048	1,398	2,184	550	600	900	700	1,380	2,050
QA/ Coach	310	400	520	98	130	203	491	654	1,022	437	582	910	280	400	520	380	537	693

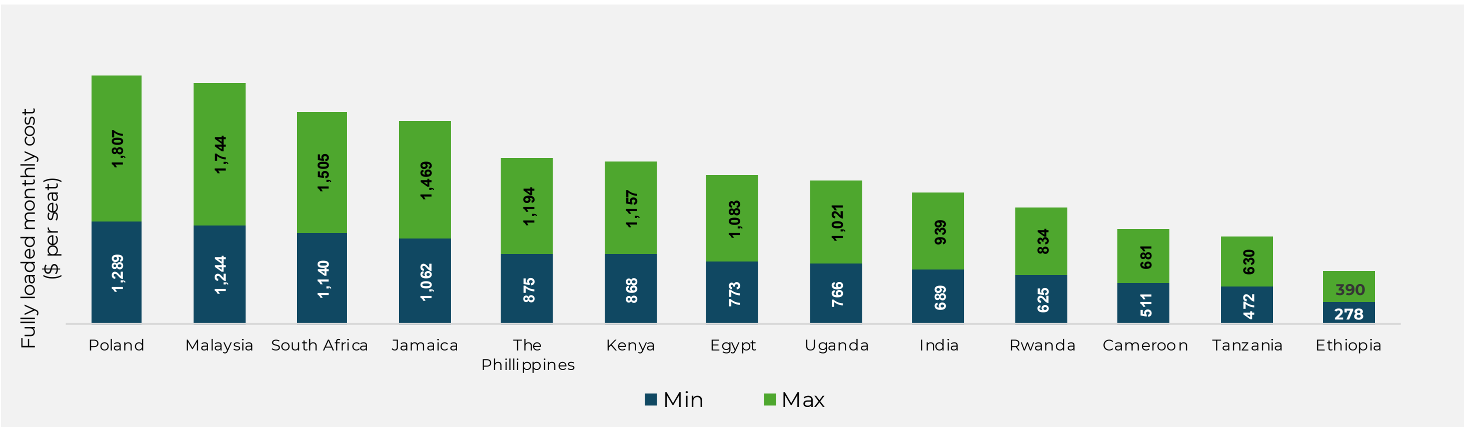
Salary differentiation is more pronounced in IT and technical roles, with higher pay in markets that support more complex, export-ready digital services, such as **Kenya and Rwanda**.

Table 2: Average Monthly ITO Salary Comparison (US$)

Role	Cameroon			Ethiopia			Kenya			Rwanda			Tanzania			Uganda		
	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level	Entry Level	Mid-Level	Senior Level
IT Helpdesk Agent	265	395	500	98	130	203	316	421	658	356	475	743	235	320	400	290	370	620
Technical Support Specialist	310	440	704	113	150	234	426	568	888	430	573	895	280	400	630	355	574	790
Software Developer	450	658	1,080	248	330	516	852	1,136	1,775	741	988	1,544	390	630	1,010	480	1,000	1,600
Data Analyst	380	697	980	165	220	344	590	787	1,230	600	801	1,251	340	650	940	420	700	1,160
IT Manager	705	1,500	2,080	300	400	656	1,516	2,021	3,158	1,177	1,569	2,451	625	950	1,500	680	1,451	2,150

When fully loaded costs are considered, including benefits, facilities, and management, the region remains highly competitive by global standards, with per-seat CX operating costs materially below those in more established hubs across Eastern Europe and Latin America.

Figure 7: Competitor Comparison of Fully Loaded (FTE) Contact Center Monthly Costs (US$)

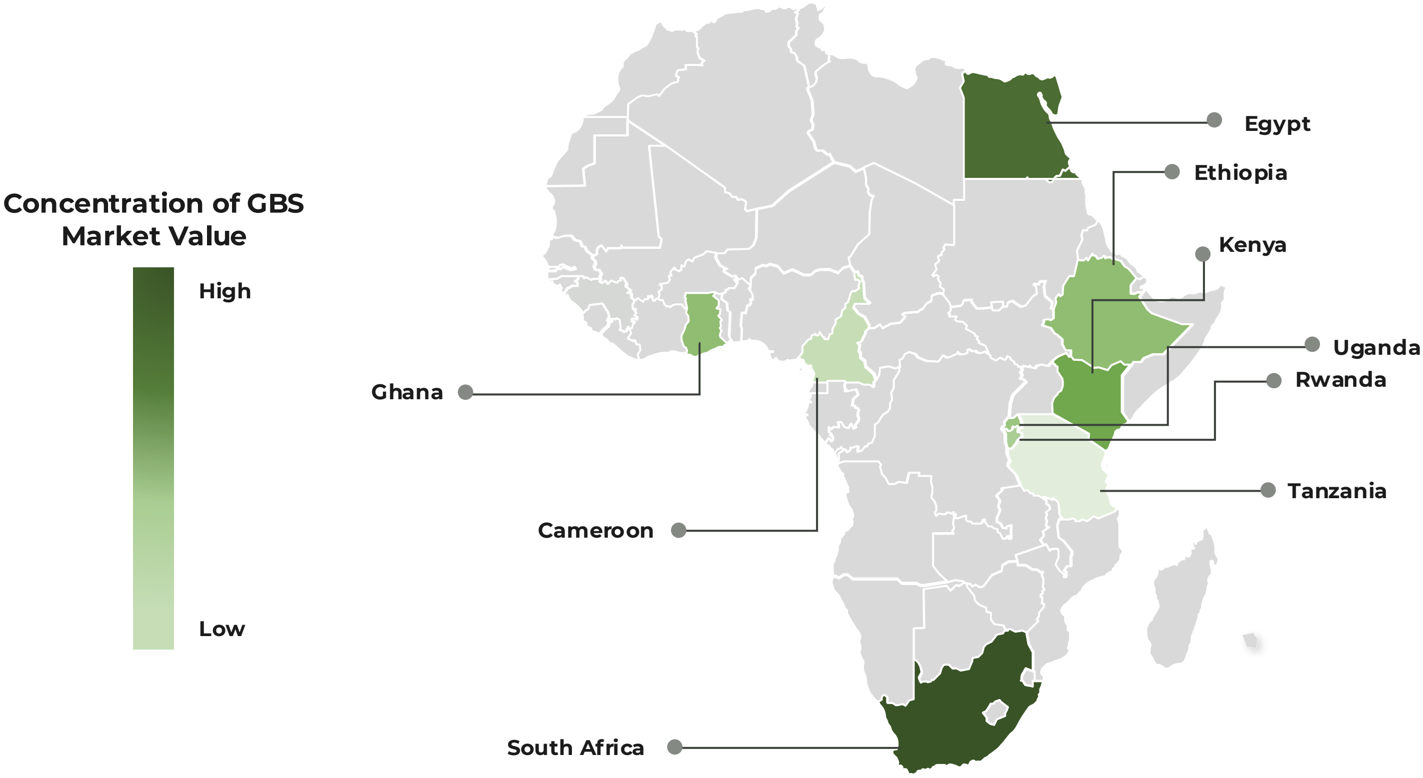


4.4 Comparative Positioning within Africa's GBS Landscape

Notably, East and Central Africa are not positioned to displace Africa's mature GBS hubs, but to complement them within diversified, multi-location delivery portfolios. The region's comparative role is defined by its ability to provide incremental scale, cost-efficient expansion capacity, and talent diversification, rather than by absolute market size or service dominance.

Africa's GBS activity remains highly concentrated in a small number of mature markets. **Egypt, Morocco, Tunisia and South Africa** anchor the continent's offshore GBS ecosystem, underpinned by deep talent pools, diversified service offerings, and long-established international delivery credentials. These markets continue to support complex, large-scale global programs, but are increasingly subject to rising wage pressure, talent saturation, and concentration risk.

Figure 8: African GBS Markets Graded by Market Value



Against this backdrop, **East and Central Africa represent a secondary growth layer** within Africa's GBS landscape. **Kenya** has emerged as the region's anchor market,, while **Ethiopia and Rwanda** have become increasingly comparable to West African peers, such as **Ghana**. Kenya's scale, export-oriented CX capabilities, and depth of B2 English-speaking talent support its role as a credible expansion location for international service delivery.

Beyond Kenya, Rwanda and Ethiopia, **Uganda, Tanzania, and Cameroon**, offer targeted, lower-cost expansion capacity. While modest in absolute scale, these locations play a strategic role in portfolio diversification, enabling phased expansion, risk mitigation, and the development of future export-ready talent pipelines alongside Africa's established hubs.

5. Regional SWOT Analysis

S

Strengths

- **Large, young, and replenishing talent pools** with improving education and work readiness outcomes.
- **High trainability and service orientation**, particularly for CX and IT-enabled services.
- **Strong English proficiency** with neutral accents; bilingual English–French capability in select markets.
- **Structural cost advantage** versus mature African hubs and global offshore locations.
- **Time-zone alignment** with Europe and relative political stability in key markets.
- **Strategic role** as gateways to pan-African operations for multinational firms.

W

Weaknesses

- **Low global visibility** and limited referenceability, outside of Kenya.
- **Shallow middle-management** and specialist skills depth.
- **Infrastructure constraints**, including power reliability and broadband quality in some of the locations.
- **Regulatory and administrative friction** in some of the markets.
- **Fragmented and underdeveloped GBS branding** at the regional level.

O

Opportunities

- **Growing demand for portfolio-based sourcing** and delivery diversification.
- **Differentiation** through impact sourcing, ESG alignment, and multilingual services.
- **Expansion** into digital CX, fintech, e-commerce, and entry-level AI/data services.
- **Rising domestic and intra-African outsourcing** demand.
- **Tier 2 city development** enabling access to new labor pools and cost control.
- **Increased acceptance** of distributed and remote delivery models.
- **New ecosystem coordination mechanisms**, including the establishment of industry bodies.

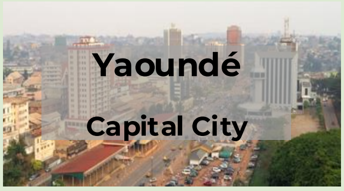
T

Threats

- **Reshoring pressures and geopolitical uncertainty** in source markets.
- **Automation and AI substitution** of low-complexity roles.
- **Intensifying competition** from mature hubs and emerging African peers.
- **Intra-regional competition** is eroding wage and incentive advantages.
- **Perceived political and security risks** in select markets.
- **Infrastructure and data protection gaps** are limiting higher-value outsourcing.

Country GBS Profile Highlights

6.1 Cameroon



English & French

Business Language

Est. GBS/BPO Domestic & International Market Size

US$93 million

Est. GBS/BPO Domestic & International Workforce

7,589

Population Demographics

29.1 million	49.8%	50.2%
Total Population	Male	Female

Talent Pool

919,000	125,000	60,000
Total Addressable Talent Pool	B2 English-speaking Talent Pool	Annual Graduates

Service Profile

- **Call Center**
- **Back Office**
- **IT Support**

Major BPO and CX Operators

AfroVisioN Group; Alternative Solutions; Camsoft group; Kinsmen Advocates Law Firm; Prince Mesue Recruitment Agency – The Pride Of Africa; Vip Call

Government Support

- Free trade zones and investment incentive regimes.
- 5–10-year tax holidays for priority sectors.
- OHADA-aligned legal framework supporting investor protection.

S Strengths

- Bilingual English-French workforce supports dual-market service delivery.
- Competitive labor costs.
- Membership in CEMAC and ECCAS supports regional service integration.

W Weaknesses

- Sector is small and underdeveloped.
- Infrastructure, especially electricity, is inadequate.
- Limited experienced CX and BPO middle-management depth.

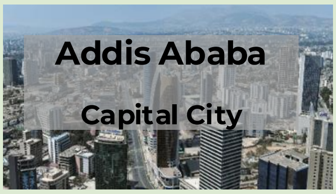
O Opportunities

- IMF-backed infrastructure modernization is improving power and digital backbone.
- Growing Francophone CX demand from Europe and African markets.

T Threats

- Strong competition from more established African GBS hubs.
- Security perceptions linked to regional political instability.
- Ranks poorly on global corruption indices, deterring foreign investors.

6.2 Ethiopia



English

Business Language

Est. GBS/BPO Domestic & International Market Size

US$435 million

Est. GBS/BPO Domestic & International Workforce

42,365

Population Demographics

132.1 million	49.9%	50.1%
Total Population	Male	Female

Talent Pool

816,400	180,400	150,000
Total Addressable Talent Pool	B2 English-speaking Talent Pool	Annual Graduates

Service Profile

- **Call Center**
- **Data Entry**
- **IT Support**
- **Software Testing**

Major BPO and CX Operators

ABC, Belimuno Recruiting Service, CCI, EQOS Global, R&D Group, service management group (smg), Tech Mahindra, Techno Brain

Government Support

- Tax holidays and customs duty exemptions for investors.
- Government-backed ICT parks and infrastructure investment.
- Strong investment protections with profit repatriation guarantees.

S Strengths

- One of Africa's lowest labor cost GBS markets.
- Large, educated youth population enables long-term workforce scalability.
- Strong government support for GBS and ICT development.

W Weaknesses

- Limited English fluency can constrain international CX service.
- ICT infrastructure and slow broadband speeds.
- Persistent issues in business environment and governance.

O Opportunities

- Telecom liberalization to improve connectivity and reduce costs.
- National IT parks and e-government initiatives enable digital services

T Threats

- Macroeconomic instability and high inflation.
- Weak credit ratings raise investor risk perceptions.
- Regional competition from more mature East African hubs.

6.3 Kenya

English

Business Language

Est. GBS/BPO Domestic & International Market Size

US$709 million

Est. GBS/BPO Domestic & International Workforce

36,394

Population Demographics

56.4 million	**49.6%**	**50.4%**
Total Population	Male	Female

Talent Pool

2.6 million	**765,000**	**141,000**
Total Addressable Talent Pool	B2 English-speaking Talent Pool	Annual Graduates

Service Profile

- **Call Center**
- **AI**
- **IT Support**
- **Content Moderation**

Major BPO and CX Operators

cloudfactory, CCI, CODEPATH, fusion communication systems, iSON experiences, sama, Outsourcing Limited, Software Group, Teleperformance each interaction matters, Techno Brain Empowering Lives

Government Support

- SEZs, ICT hubs, and targeted corporate tax incentives.
- National digital skills programs, including Ajira and Jitume.
- Strong investor protections and streamlined investment facilitation.

S Strengths

- Large B2 English-speaking talent pool with neutral accents.
- Mature CX, IT-enabled services, and digital delivery ecosystem.
- Strong enabling infrastructure and stable investment environment

W Weaknesses

- Rising labor costs relative to nascent African GBS markets.
- Talent retention challenges driven by competition and global mobility.
- Infrastructure strain and congestion in urban centers.

O Opportunities

- Growing demand for digital CX, AI, and IT outsourcing.
- Government-backed digital skills initiatives.
- Regional gateway role enables pan-East African service delivery.

T Threats

- Increasing competition from lower-cost African delivery locations.
- Global reshoring pressures.
- Currency volatility and macroeconomic pressures.

6.4 Rwanda

English & French

Business Language

Est. GBS/BPO Domestic & International Market Size

US$130 million

Est. GBS/BPO Domestic & International Workforce

7,625

Population Demographics

14.3 million	48.8%	51.2%
Total Population	Male	Female

Talent Pool

535,000	75,100	23,500
Total Addressable Talent Pool	B2 English-speaking Talent Pool	Annual Graduates

Service Profile

- **Call Center**
- **Back Office**
- **IT Support**
- **Finance & Accounting**

Major BPO and CX Operators

AMALITECH, ALCPA, CCI Rwanda, Deriv, ADFinance, Mighty Engineering Co., iSON Experiences, Q-Sourcing Servtec, TeKnowledge

Government Support

- SEZ incentives, tax holidays, and targeted ICT investment benefits.
- One-stop investor facilitation through the Rwanda Development Board.
- GBS Growth Initiative coordinating skills, incentives, and market entry.

S Strengths

- Youthful bilingual English-French workforce.
- Highly competitive costs and low attrition in CX delivery.
- Strong governance, political stability, and investor-friendly environment.

W Weaknesses

- Small market scale limits immediate large-volume delivery.
- Shortage of experienced mid-level IT and BPO managers.
- Talent and infrastructure concentrated in Kigali.

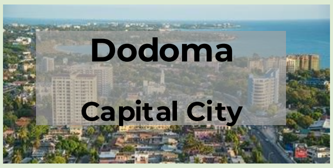
O Opportunities

- Growing demand for bilingual Francophone and Anglophone services.
- Expansion into AI-enabled, digital, and IT support services.
- ESG-aligned impact sourcing attracts global buyers.

T Threats

- Competition from larger, more established African GBS hubs.
- Misperceptions around regional security despite internal stability.
- Global outsourcing slowdowns and reshoring pressures.

6.6 Tanzania



English

Business Language

Est. GBS/BPO Domestic & International Market Size

US$85 million

Est. GBS/BPO Domestic & International Workforce

6,818

Population Demographics

68.5 million	49.6%	50.4%
Total Population	Male	Female

Talent Pool

1.1 million	90,800	71,000
Total Addressable Talent Pool	B2 English-speaking Talent Pool	Annual Graduates

Service Profile

- **Call Center**
- **Back Office**
- **IT Support**
- **Research Services**

Major BPO and CX Operators

Government Support

- Investment incentives and facilitation through the Tanzania Investment Centre.
- Capital allowances, deferred VAT, and reduced import duties.
- Investor protections via MIGA, ICSID, and profit repatriation rights.

S Strengths

- Large English-speaking youth population supports workforce scalability.
- Competitive labor costs for entry-level CX and BPO roles.

W Weaknesses

- Limited skills depth for complex GBS and IT services.
- Underdeveloped ICT infrastructure impacts service reliability.
- High poverty levels constrain workforce readiness.

O Opportunities

- Regional integration through EAC and SADC.
- Government ICT initiatives supporting digital and BPO development.
- Rapid urbanization increases access to employable talent.

T Threats

- Competition from faster-growing East African GBS destinations.
- Global reshoring pressures reduce offshore outsourcing demand.

6.5 Uganda

English

Business Language

Est. GBS/BPO Domestic & International Market Size

US$163 million

Est. GBS/BPO Domestic & International Workforce

12,637

Population Demographics

48.3 million	49.3%	50.7%
Total Population	Male	Female

Talent Pool

256,500	156,000	60,000
Total Addressable Talent Pool	B2 English-speaking Talent Pool	Annual Graduates

Service Profile

- **Customer Support and Sales**
- **HR Management**
- **ITO Services**

Major BPO and CX Operators

Cybit Limited, emvigo, Exquisite Solution, iSON Xperiences, Platinum Contact Center, Techno Brain

Government Support

- Free zones and industrial parks with tax incentives.
- Investment facilitation via Uganda Investment Authority.
- ICT skilling programs aligned to digital services growth.

S – Strengths

- Large English-speaking youth population with cultural alignment.
- Competitive labor costs for entry-level CX services.
- Strategic East African location complementing Kenya.

W – Weaknesses

- Limited depth of experienced BPO middle management.
- ICT reach and bandwidth constraints persist.
- Small international client base relative to peers.

O – Opportunities

- Growing demand for Anglophone CX delivery.
- Digital skills programs expanding the employability pipeline.
- Spillover demand from Kenya capacity constraints.

T – Threats

- Competition from more established East African GBS/BPO hubs.
- Infrastructure execution risks impacting service reliability.
- Security and instability issues in neighbouring countries.

7. Infrastructure

7.1 ICT Infrastructure and Digital Connectivity

Across East and Central Africa, **ICT infrastructure, digital connectivity, and power availability have improved materially over the past decade**, with country-level differences shaping readiness for scalable, export-oriented GBS delivery.

Figure 9: Country Public, ICT, Power, and Utilities Infrastructure Highlights

Cameroon

- **Central African fiber** corridor access.
- **Power reliability is** strongest in Douala and Yaoundé.
- **National ICT upgrades** are ongoing via public programs.

Ethiopia

- **Telecom liberalisation** introduced new private operators.
- **Government-led ICT spend is** among the highest in East Africa.
- **National fibre and cloud-hosted platforms** are expanding.

Kenya

- **6** subsea cable systems.
- **>90%** electricity reliability in Nairobi commercial zones.
- **80%** mobile broadband penetration in urban areas.

Rwanda

- **4G LTE covers 95%** of populated areas.
- **>99% power availability** in Kigali CBD.
- **High digital public-service adoption** (e-government, e-ID).

Tanzania

- **Subsea cable connectivity** via East African cable systems.
- **Reliable grid power** in Dar es Salaam CBD.
- **ICT readiness is improving,** but ranked outside the top 100 globally.

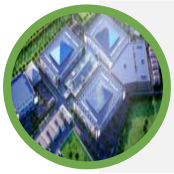
Uganda

- **Connected to global fibre** via SEACOM subsea cable.
- **5,100 km** national fibre backbone.
- **79% urban water access**, supporting business continuity.

7.2 Commercial Property Availability and Cost

Commercial property markets in the region generally offer adequate office availability for GBS operations, with costs remaining structurally competitive by global standards. While quality and scale vary by city, most markets provide sufficient Grade B and emerging Grade A space, flexible leasing terms, and landlord incentives that support phased entry and expansion.

Figure 10: Country Commercial Property Highlights

 **Cameroon**	Commercial space is concentrated in Douala and Yaoundé.	Adequate utilities in prime nodes only.	Rentals generally low to mid-range by African standards.
 **Ethiopia**	Rental levels remain low by regional standards.	Limited Grade A stock; conversion space commonly used.	Expanding office supply driven by public and private investment.
 **Kenya**	Deepest Grade A and B office stock concentrated in Nairobi.	Mature BPO-ready buildings with backup power and fibre.	Flexible lease structures and fit-out incentives common.
 **Rwanda**	Concentrated modern office supply in Kigali CBD and KCC zone.	High-quality government- and private-led developments.	Smaller absolute stock but low vacancy risk.
 **Tanzania**	Office supply concentrated in Dar es Salaam.	Improving availability of modern mixed-use developments.	Landlords increasingly offering lease flexibility post-COVID.
 **Uganda**	Growing Grade B office availability i Kampala.	BPO-suitable space increasingly available near transport corridors.	Adequate capacity for mid-scale and phased expansion.

7.3 Transport Access and Reliability

Transport infrastructure across the region can generally support GBS operations through a combination of international air connectivity, improved urban road networks, and employer-provided transport solutions. While reliability and coverage vary by city, most markets enable predictable workforce access to delivery centers, particularly within primary urban hubs.

Urban transport constraints remain localized and most evident during peak hours in larger cities but are generally manageable for GBS operations through centralized site selection, staggered shifts, and employer-supported transport solutions.

From an investor perspective, **transport access is no longer a regional constraint but a location-specific consideration**, with ongoing investments in airports, road networks, and urban mobility expected to further improve reliability over time.

Figure 10: East and Central Africa Transport Highlights

15	590,000 km	US$0.40	US$1.75	US$2.75
International airports	Total road network	Average bus fare	Average taxi fare	Average e-hailing fare for 5km trip

Bus Rapid Transit (Tanzania)

Boda Boda (Uganda)

Electric Buses (Kenya)

8. Investment Environment and Incentives

8.1 Policy and Institutional Support for GBS

Governments across the region have increasingly positioned GBS as a strategic lever for services-led growth, export diversification, and youth employment. This is reflected in clearer institutional ownership, more targeted sector strategies, and increasingly proactive investment facilitation frameworks focused on digital and services-led investment.

Dedicated investment promotion agencies and sector bodies play a central role in supporting GBS development. In more coordinated markets, these institutions provide streamlined investor engagement, facilitate licensing and setup processes, and support skills and employability initiatives aligned to industry demand. Purpose-built programs, technology zones, and digital skills initiatives further reduce entry friction and support phased scale-up for service providers.

Figure 11: Examples of Key Sector Industry Bodies or Agencies Across the East and Central Africa

ETHIOPIAN OUTSOURCING ASSOCIATION

BPCC
BUSINESS PROCESS COUNCIL OF CAMEROON

OAK
The Outsourcing Alliance of Kenya

NITA UGANDA
- Driving the IT Revolution -

RWANDA GLOBAL BUSINESS SERVICES GROWTH INITIATIVE

UGANDA BUSINESS PROCESS OUTSOURCING ASSOCIATION

TANZANIA INVESTMENT CENTRE
THE FACILITATOR

Overall, policy and institutional support for GBS across the region is shifting from ad hoc promotion toward a more structured and facilitative model. While execution capacity varies by country, the growing presence of dedicated institutions and public–private collaboration increasingly supports sustained market entry, workforce development, and long-term sector maturation rather than one-off investment attraction.

8.2 Fiscal Incentives and SEZ Frameworks

Investment incentives across the region are primarily anchored in **Special Economic Zones (SEZs), industrial parks, and targeted fiscal measures** aimed at reducing setup costs, improving investor certainty, and accelerating services-led job creation.

Figure 11: Overview of the Types of Investment Incentives Across East and Central Africa

Regional Investment Incentives

Tax, VAT and Customs Relief

- Corporate income tax holidays.
- Duty-free importation of ICT equipment and capital goods.
- VAT exemptions on qualifying technology and fit-out inputs.

SEZs and Infrastructure

- Designated SEZs and industrial parks hosting ICT and services firms.
- Plug-and-play facilities with reliable power and high-speed connectivity.
- Technology parks and innovation districts.

Skills and Employment Support

- Training subsidies and employability programs linked to local hiring.
- Public–private skills initiatives aligned to GBS workforce requirements.
- Most structured in Kenya and Rwanda.

8.3 Investment Climate and Risk Considerations

The investment climate across East and Central Africa reflects improving fundamentals alongside uneven execution capacity, requiring careful country- and site-level differentiation. More established markets, such as **Kenya and Rwanda**, benefit from stronger investor protections and more predictable regulatory processes, while other countries are progressing at a more gradual pace.

Residual risks remain, including administrative complexity, restrictive legislation, and macroeconomic pressures, such as currency volatility and inflation, which may affect cost stability. Political and security risks are typically localized rather than systemic, with impacts felt more acutely in investor perception than in day-to-day operations.

All six profiled countries are members of the International Center for Settlement of Investment Disputes (ICSID) and are signatories to the New York Convention on the Recognition and Enforcement of Foreign Arbitral Awards, enabling foreign investors to pursue international arbitration and enforce awards outside domestic court systems. In addition, most countries participate in the Multilateral Investment Guarantee Agency (MIGA) framework, offering political risk insurance against expropriation, currency inconvertibility, and civil disturbance.

For GBS investors, these risks are largely manageable through phased entry, use of SEZ frameworks, strong contractual protections, and local partnerships. In practice, most risk factors influence the speed and cost of scaling rather than operational viability, positioning the region as a differentiated but investable GBS growth frontier.

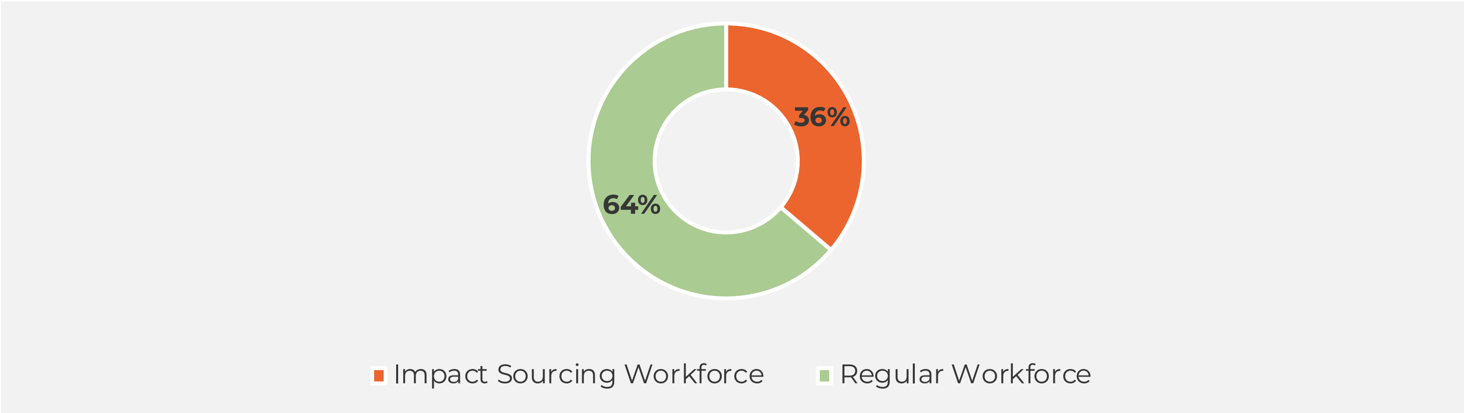
9. Inclusion and Impact Sourcing Models

9.1 Impact Sourcing as a Talent and Cost Advantage

Impact sourcing has evolved into a core talent and cost advantage for GBS delivery in East and Central Africa, extending the effective talent pool beyond traditional graduate and urban labor markets. Across the region, impact-sourced workers account for a significant share of the GBS workforce, supported by large youth populations and strong female participation in entry-level service roles suited to CX, digital CX, and back-office delivery.

Adoption varies by market, reflecting sector maturity and policy focus. **Kenya and Rwanda** both demonstrate particularly deep integration through deliberate inclusive hiring models, while **Tanzania** and other markets show growing uptake as operators seek to broaden recruitment channels and manage competition for experienced talent.

Figure 12: Impact Sourcing Workers as a Composition of the Total GBS Workforce Across East and Central Africa

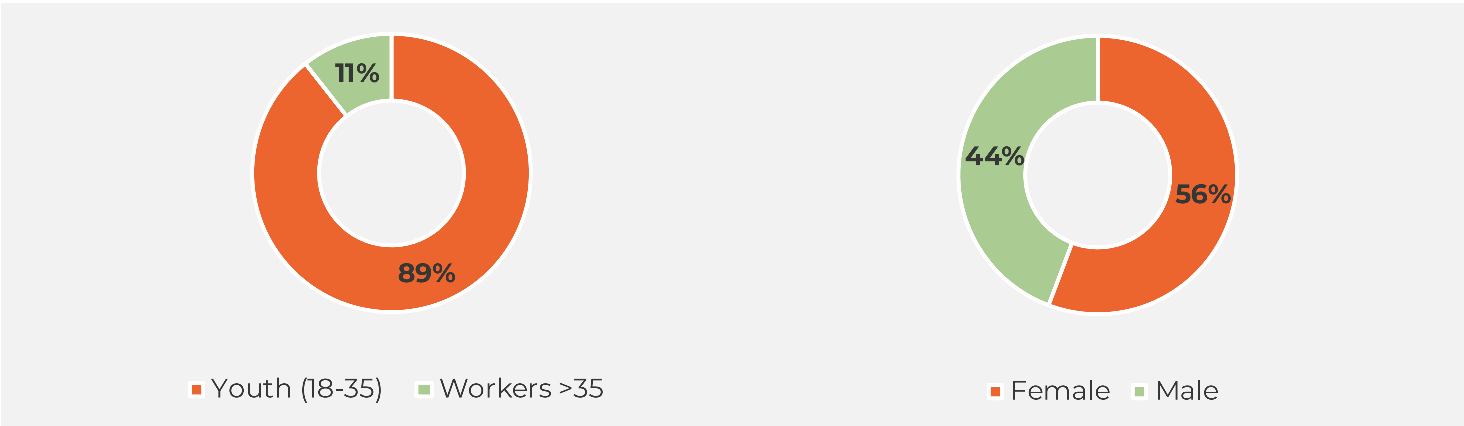


From an operating perspective, impact sourcing enables access to competitively priced, underutilized labor while maintaining service quality through targeted training and structured onboarding. Lower attrition and improved workforce stability further enhance cost efficiency, positioning impact sourcing as a commercially relevant lever supporting scalability, resilience, and long-term competitiveness in global GBS delivery models.

9.2 Inclusion, ESG Alignment, and Buyer Demand

In East and Central Africa, inclusion is not a bolt-on feature but an inherent characteristic of the workforce, closely aligned with evolving buyer expectations. The region's GBS workforce is overwhelmingly youth-led, positioning the sector as a major entry point into formal employment while providing buyers with a highly scalable and future-oriented talent base. Strong female participation further reinforces inclusion credentials, particularly in CX and shared services roles, where it is associated with service quality, workforce stability, and lower attrition.

Figure 13: Female vs. Male Workers and Youth as a Composition of the Total GBS Workforce Across East and Central Africa



9.3 Ecosystem Enablement and Delivery Models

The scalability of inclusion and impact sourcing in East and Central Africa is underpinned by a multi-stakeholder ecosystem comprising governments, private operators, training institutions, NGOs, and development partners. This ecosystem reduces execution risk and enables impact sourcing to function as a repeatable delivery model, rather than a pilot-based intervention.

Figure 14: East and Central Africa GBS Stakeholder Ecosystem with Examples

In practice, the presence of an enabling ecosystem allows impact sourcing in East and Central Africa to be operationalized at scale, supporting reliable service delivery while meeting inclusion and ESG objectives. For investors and buyers, ecosystem depth is a key differentiator, reducing dependency on single actors and strengthening the resilience of inclusive GBS delivery models.

10. Strategic Outlook and Recommendations

10.1 How the Region Is Evolving and Where Demand Is Scaling

The strategic outlook for East and Central Africa's GBS sector is best understood through **how service capabilities are evolving and where demand can scale today** versus where it is still emerging.

Figure 15: East and Central Africa Sectoral Evolution and Demand Pathways

Evolution

From pilot delivery to structured growth

- Sector evolution is **uneven across markets**, requiring differentiated strategies.
- CX remains the **core anchor service**, supported by large English- and French-speaking youth workforces.
- A shift is underway from **voice-only** to **digital and blended CX models**.
- Early deepening into **IT-enabled and technical services** layered onto CX.
- **Impact sourcing** has emerged as a structural differentiator, reinforcing scale, cost, and ESG alignment.

Demand

What can scale now (vs. what is still emerging)

Primary Demand Pathway: Export CX

- High-volume English-language CX for Europe, UK, Middle East.
- French-language CX for Europe and Francophone Africa.
- Growing shift to digital & blended CX (chat, email, social).

Secondary Demand Pathway: IT-Enabled Services

- IT helpdesk, AI services, application support, entry-level ITO.
- Commercially viable in select markets only.

Cross-Cutting Enabler: Impact Sourcing

- Expands addressable talent pool.
- Aligns with ESG-driven procurement.
- Enhances scalability without increasing cost.

Taken together, the region's evolution toward more structured delivery models and the clear primacy of export-oriented CX define a pragmatic growth pathway. While digital and IT-enabled services are gaining traction, scalable demand remains anchored in high-volume CX, supported by impact sourcing as a cross-cutting enabler.

For investors and operators, the opportunity lies in aligning service ambition with market maturity, scaling what is proven today while selectively building capability for higher-value services over time.

10.2 Strategic Recommendations by Stakeholder

The evolving GBS landscape in East and Central Africa presents differentiated priorities for investors, policymakers, and ecosystem enablers. Realizing the region's potential will depend less on broad-based promotion and more on **focused execution aligned to current market readiness**.

For Investors and operators	For Policymakers	For Ecosystem Enablers
▪ **Adopt portfolio-based expansion strategies:** Anchor delivery in mature markets and sequence entry into secondary locations. ▪ **Prioritize export-oriented CX and digital CX:** Focus on service lines aligned to current workforce and infrastructure readiness. ▪ **Layer IT-enabled services selectively:** Extend into helpdesk, AI and application support where skills pipelines are established. ▪ **Integrate impact sourcing into core hiring models:** Expand talent pools, reduce attrition, and strengthen ESG alignment. ▪ **Leverage Tier 2 locations for phased scale:** Access lower-cost talent while managing risk through controlled ramp-up. ▪ **Apply phased entry and risk mitigation models:** Use SEZs, redundancy planning, and location-level due diligence.	▪ **Shift from incentive-led to demand-led development:** Prioritize skills, service readiness, and execution over headline incentives. ▪ **Strengthen export-ready skills pipelines:** Focus on digital CX, IT-enabled services, and language proficiency. ▪ **Improve predictability of incentives and regulation:** Simplify access, enhance transparency, and ensure policy continuity. ▪ **Reinforce data protection and investor safeguards:** Align frameworks with international standards to support offshore delivery. ▪ **Support Tier 2 city development:** Enable decentralization through infrastructure, zoning, and targeted incentives. ▪ **Coordinate national GBS branding and promotion:** Improve international visibility and market positioning.	▪ **Align training programs with operator demand:** Focus on work-readiness, soft skills, and job-specific capabilities. ▪ **Scale impact sourcing delivery models:** Move from pilot initiatives to repeatable, commercially viable programs. ▪ **Strengthen public–private collaboration:** Link training providers, operators, and government initiatives more tightly. ▪ **Support inclusion at scale:** Enable sustained participation of youth and women through structured pathways. ▪ **Improve market intelligence and benchmarking:** Provide data to support informed investment and expansion decisions. ▪ **Facilitate ecosystem coordination:** Reduce fragmentation and improve execution across institutions and partners.

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Genesis provides **data-driven diagnostics, market intelligence, and strategy advisory** across the GBS and digital services landscape in Africa. Building on deep, country-level research and operator insight, we support investors, policymakers, and ecosystem enablers in **making informed decisions on market entry, expansion, and sector development**.

While this report focuses on selected East and Central African markets, our capabilities extend across **multiple African geographies** and service segments.

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