



G:ENESIS GLOBAL BUSINESS SERVICES





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The African Global Business Services (GBS) sector is poised for exponential growth over the next three years as the domestic and international markets of various countries expand and flex their onshore and offshore proficiencies.

This Africa GBS Buyers Report is based on the 2022 Africa GBS Benchmarking and Market Report which indicates that the **total African GBS offshoring market alone is expected to reach US\$11.7 billion by 2023** from \$8.3 billion in 2021.

Collectively, the domestic and international GBS/BPO market on the continent generates \$15.1 billion in revenue and is expected to rise to \$19.8 billion by 2023. As such, this report reviews 19 mature, emerging and nascent GBS locations in Africa, uncovering their macro-economic environments, GBS capabilities, connectivity, knowledge resources, enabling environments and levels of regional and global competitiveness.

The information provides a holistic situational analysis of each African GBS location, enabling organizations, investors and buyers to make informed decisions on outsourcing, co-sourcing or expanding into Africa.



2021 Africa GBS Offshoring Market = \$8.3 billion

Rising to \$11.7 billion by 2023





The most prolific value proposition across all African GBS locations is their extremely low labor costs.

The monthly cost of a contact center agent in Africa can range from US\$546 to as little as US\$175, while contact center manager costs can cost a maximum of US\$2,860 to a minimum of US\$406 per month.

Overall, global source markets and business buyers can save themselves up to 86% in labor costs when outsourcing to African offshore service providers.

In essence, outsourcing to Africa can significantly reduce operational costs of an international organization; therefore, maximizing profitability.



Salary ranges of African contact centre agents

\$175 to \$546





Africa's population growth rate is the fastest in the world and is expected to increase by 50% over the next 18 years.

Already, Africa has a large population of youth entering into the labor market. Youth employees are most suited for GBS/BPO operations, as they have the energy and tenacity to handle the high-tempo environment of GBS operations, especially call centers.

In addition, education in Africa has vastly improved over the last two decades, where a larger portion of African youth are graduating through tertiary institutions.

Therefore, Africa's ample supply of educated youth has become one of its core GBS/BPO value propositions.



Africa's GDP: **\$2.6 Trillion**Total population: **1.3 Billion**Youth population: **316 Million**





Almost all African countries have a European language as part of its list of official languages. **Anglophone and Francophone** speakers are widespread across the continent.

Most North African nations speak Arabic dialects and can easily service the Arab market.

Out of the selected African GBS destinations profiled in this report, Morocco has the highest number of French speakers (10 million), Nigeria has the highest number of English speakers (37,1 million) and Egypt has the highest number of Arabic speakers (68 million). Chinese, Portuguese, German, Dutch and Gujarati are some of the other prolific foreign languages spoken across Africa.









African GBS workers have shown to be more resilient to high pressure working environments and as a result worker attrition levels are lower than those of other, traditional offshore locations. Empathy levels are also shown to be high among African GBS workers, making them ideal in customer interactions. Some African countries, especially South Africa, have cultural affinities with commonwealth nations, including the Australia, New Zealand and the UK.

No longer known as a region of instability and conflict, most African countries have stable political environments that have stabilized their economies as a result. When combined with attractive investment incentives and support, the business environment for GBS operators is conducive when compared to other developing regions across the world.

Government support for the GBS sector is strong across Africa, where government policy makers have identified GBS as a tool to address key socio-economic issues, such as unemployment and poverty.



Attrition rates are lower

Empathy levels are high





ABOUT
THE
RESEARCH

09



ABOUT THE RESEARCH

The Mixed Methods Research was utilized as the methodology for the Africa Global Business Services (GBS) Benchmarking and Market Report (which was used as a source for this Africa GBS Buyers Choice Report).

This included the integration of qualitative secondary research and stakeholder interviews with primary, quantitative survey data.

The vertical industries the organizations operate in include automotive (8%), banking (8%), born digital (8%), insurance (9%), hospitality and leisure (11%), healthcare and medical (12%), retail and ecommerce (13%), telecoms and media (13%), technology and software (13%) and utilities and energy (11%).





08%



08%

Born digital



11%
Hospitality and leisure

12%
Healthcare
and medical



13% Retail and ecommerce



12%
Telecoms
and media



13%
Technology
and software



11% Utilities and energy





ABOUT THE RESEARCH

AFRICA GBS SUPPLY

The fieldwork consisted of **profiling 19 African** countries whereby **504 profiling surveys and** interviews with GBS service providers, delivery centers, analysts and stakeholders.

This provided key insights into the GBS sector and regional competitiveness of each country. As a result, detailed macro-economic and demographic data is provided on each country along with reviews of their enabling infrastructure, business and investment environments.

Key data pertaining to the GBS markets in each African country was compiled from the profiling surveys that provide overviews of the GBS and ICT/ITES capabilities, skills, services, strengths, weaknesses, threats and opportunities of each country.

Moreover, market trends, sizes and salary reviews were corroborated and validated on each country. We have referenced published reports and data sets, either published by or own organization or obtainable from publicly available sources.



Country assessments of each African location were conducted:

1. Botswana

2. Egypt

3. Ethiopia

4. Ghana

5. Kenya 6. Malawi

7. Mauritius

8. Morocco

9. Mozambique

10.Namibia

11. Nigeria

12. Rwanda

13. Senegal

14. South Africa

15. Tanzania

16. Tunisia

17. Uganda

18. Zambia

19. Zimbabwe







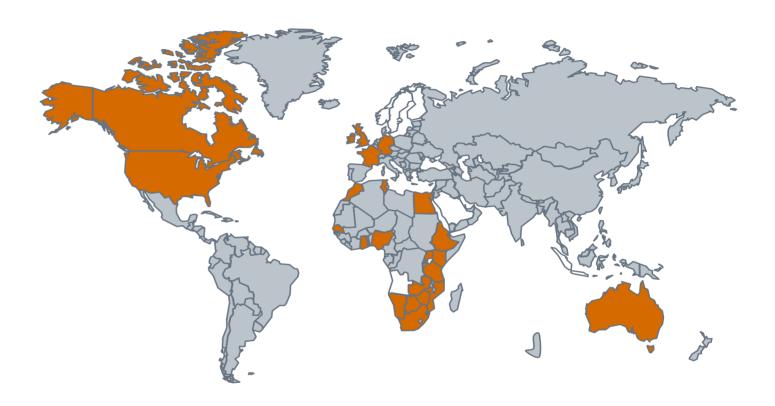
ABOUT THE RESEARCH

GLOBAL VERTICAL INDUSTRY DEMAND

In addition to the Africa research, a global vertical industry demand survey was conducted to present a comparable overview of each African country's service delivery capability in key GBS and business process services. A total of 360 interviews were conducted for the global vertical industry demand survey via outbound calls and telephonic interviews with enterprise executives. These respondents represented organizations in Australia, Canada, Germany, France, the United Kingdom and the United States.

The fieldwork for the global vertical industry demand survey included interviews with enterprise executives, directors and heads of department of over 140 organizations that outsource and offshore services to Africa. These executives were asked to rank and rate each African country, including service level delivery across various key business process areas. As a result, the top 10 countries were ranked according to their final scores and also placed in three categories: High Performer, Proficient and Capable.

To access the full, extended report, please go to: https://gbs.world/africagbsreport



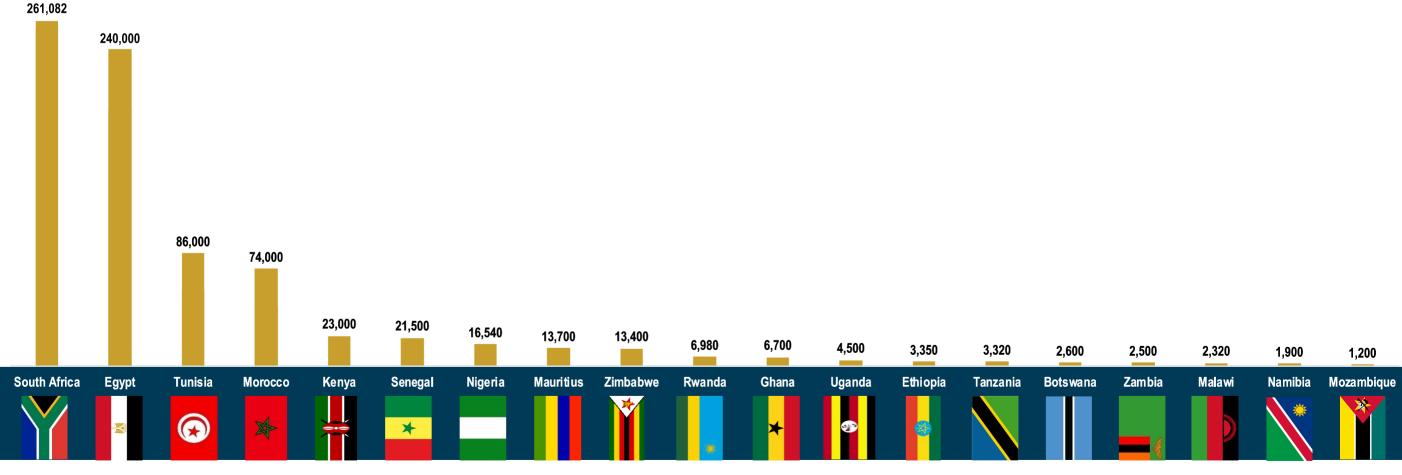
Over 34% of the global organizations interviewed generate more than \$1 billion in annual revenue, 26% of the organizations generate between \$100 - \$999 million, and the balance over \$5 billion in annual revenue.





GBS/BPO INDUSTRY MARKET SIZE DOMESTIC AND INTERNATIONAL

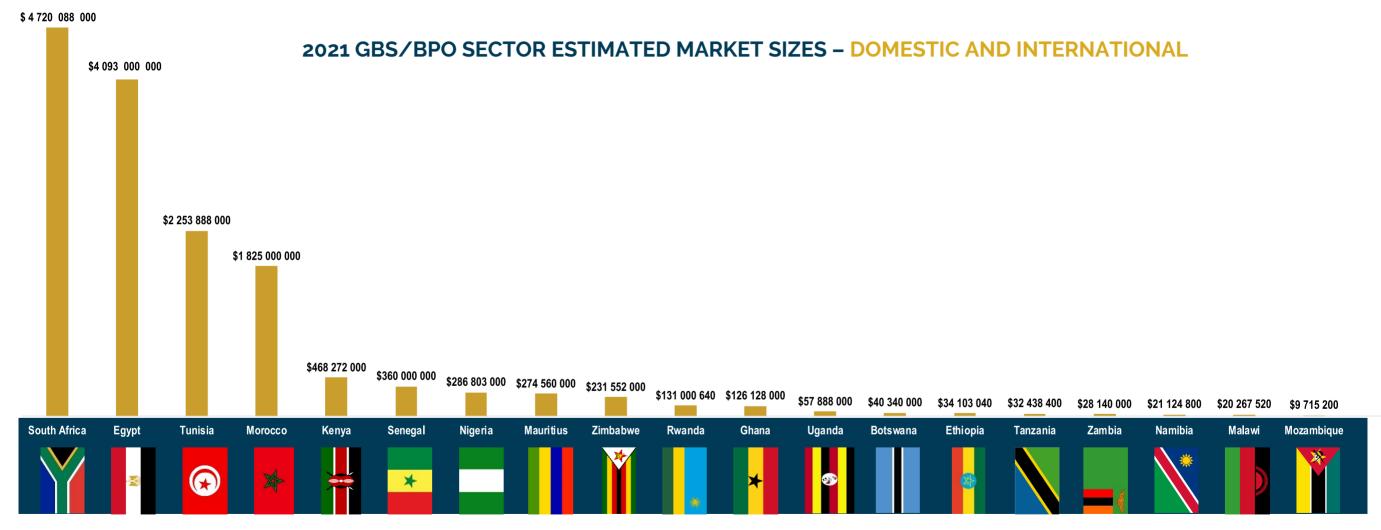
2021 ESTIMATED GBS/BPO WORKFORCES PER COUNTRY- DOMESTIC AND INTERNATIONAL



Sources: 2021 Africa GBS Benchmarking & Market Report and IDC



GBS/BPO INDUSTRY MARKET SIZE DOMESTIC AND INTERNATIONAL



Sources: 2021 Africa GBS Benchmarking & Market Report and IDC

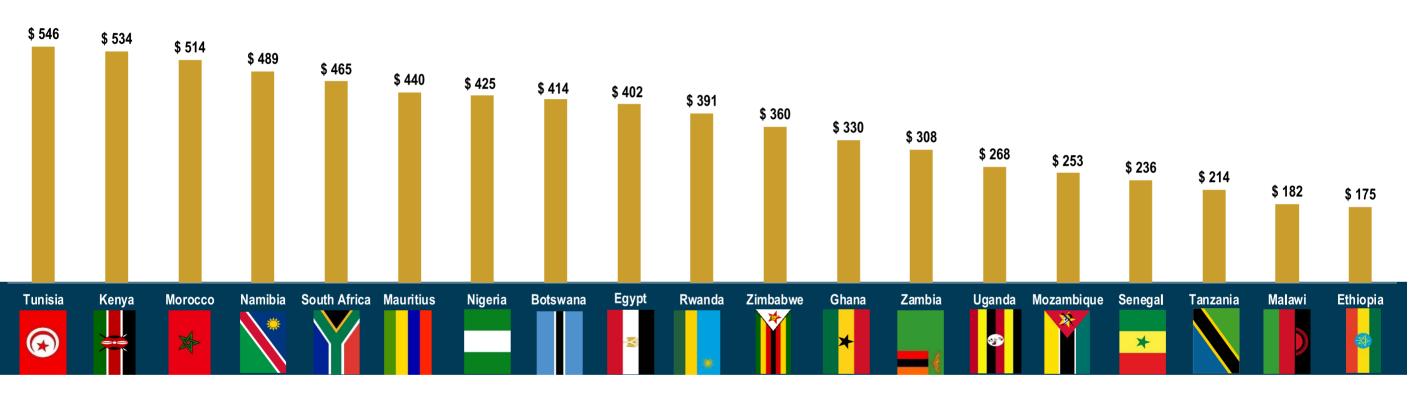
^{*} Figures for Egypt do not include IT services





AVERAGE SALARIES CONTACT CENTER AGENTS

2021 AVERAGE AFRICAN CONTACT CENTER AGENT MONTHLY SALARIES



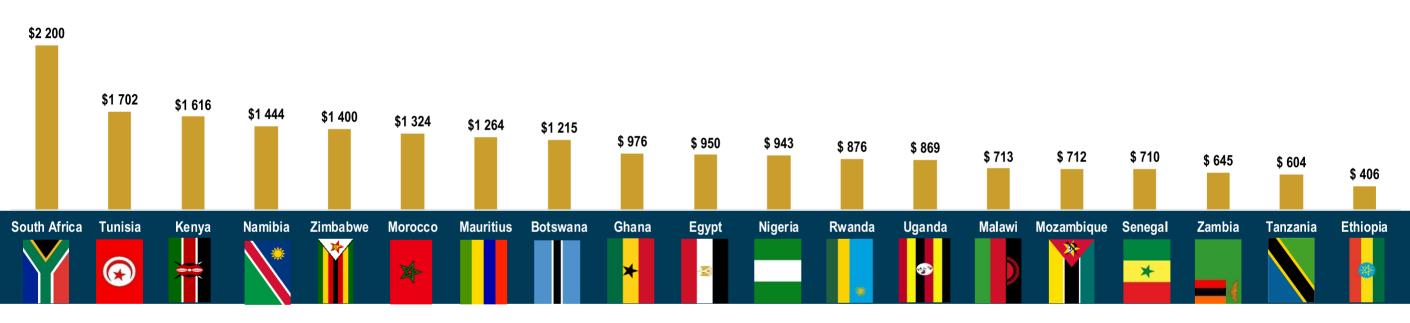
Outsourced Role	Europe	Africa	% Difference	US	Africa*	% Difference	₩ UK	• Africa	% Difference
Contact Center Agents	€2145 per month	€307 per month	-86%	\$2330 per month	\$367 per month	-84%	£3300 per month	£946 per month	-71%

Source: Salary and Labor Analyses conducted for 2021 Africa GBS Benchmarking & Market Report



AVERAGE SALARIES CONTACT CENTER MANAGERS

2021 AVERAGE AFRICAN CONTACT CENTER MANAGER MONTHLY SALARIES



Outsourced Role	Europe	Africa	% Difference	US	• Africa	% Difference	₩ UK	• Africa	% Difference
Contact Center Managers	€5080 per month	€1107 per month	-78%	\$5520 per month	\$1323 per month	-76%	£1400 per month	£262 per month	-81%

Source: Salary and Labor Analyses conducted for 2021 Africa GBS Benchmarking & Market Report





AFRICAN GBS AND CX HIGHLIGHTS

AFRICA



- ITU Rankings:
 - Range from 75 to 170 out of 170 countries.
- 2019 Global Competitiveness Rankings: Range from 52 to 137 out of 141 countries
- 2020 Tech Readiness Rankings:
 Range from 61 to 129 out of 134 countries
- Highly competitive labour costs
- Large, educated youth population
- Multilingual labour forces
- Accent neutrality or adaptability
- High levels of empathy
- Low attrition rates
- Located well within GMT time zone
- Rapidly developing ICT sectors
- Strong investor support and incentives
- Government support in maturing markets



Maturing and emerging offshore and outsourcing locations with fast-growing economies and a burgeoning pool of customer experience and specialist global business services



South Africa and Egypt are the two leading maturing markets



Estimated GBS workforces

Ranging from 1,200 to 261,000 workers



Estimated GBS market sizes

Ranging from US\$9.7 million to US\$4.7 billion





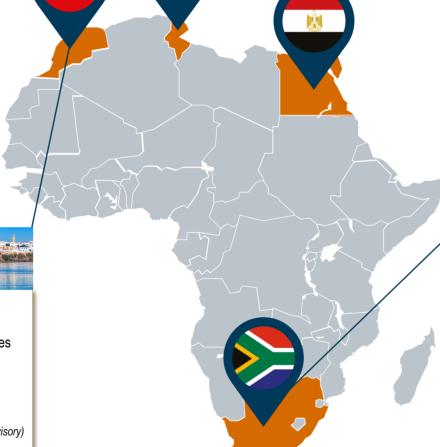
MATURING GBS AFRICAN MARKETS

Tunisia

- 62.000+ Domestic Outsourcing GBS/BPO Workers
- 24.000+ International/Offshoring GBS/BPO Workers
- Well educated workforce
- Excellent French native fluency in customer and tech support
- Great telecoms infrastructure
- **Emergent ITES services**
- Good availability of trainable labour (IT and engineers)
- ITU Ranking: 99
- 2020 Tech Readiness Ranking 91 (World Economic Forum)
- 2019 Global Competitiveness Ranking 87 (World Economic Forum)

Morocco

- 53,280+ Domestic Outsourcing GBS/BPO Workers
- 20,720+ International/Offshoring GBS/BPO Workers
- Excellent French-language capabilities and business process services
- Emerging regional technology and ITO hub
- Expertise in voice and non-voice services for Francophone countries
- Growing back office expertise in insurance and retail banking
- Established customer service skills in and after sales servicing
- Top 5 Most Favourable Global BPO Locations (2019 Ryan Strategic Advisory)
- ITU Ranking: 100
- 2020 Tech Readiness Ranking 93 (World Economic Forum)
- 2019 Global Competitiveness Ranking 75 (World Economic Forum)



Egypt



- 42,000+ Domestic Outsourcing & Offshoring GBS/BPO Workers
- 198,000+ International Outsourcing & Offshoring GBS/BPO Workers
- Global sourcing hub for captives and outsourced providers
- Developed infrastructure (telecom, transport, power, water)
- Multilingual hub supporting 20+ languages Key MEA location for IT/ITES services
- Growing KPO capabilities
- Conducive business environment and regulatory framework
- Strong investment support and incentives.
- 4th Most Favourable Global BPO Location (2021, Ryan Strategic Advisory)
- Top 5 Most Favourable Global BPO Locations (2019 Rvan Strategic Advisory)
- Top 10 Preferred Global HRO Locations (2018 Knowledge Executive)
- ITU Ranking: 103
- 2020 Tech Readiness Ranking 84 (World Economic Forum)
- 2019 Global Competitiveness Ranking: 93 (World Economic Forum)

South Africa



- 218,311+ Domestic Outsourcing GBS/BPO Workers
- 42,771+ International/Offshoring GBS/BPO Workers
- Economically competitive, value-added, global business services (GBS)

 Exceptional English talent with neutral accents
- Scalable pool of empathetic youth workers
- Developed enabling infrastructure (telecom, transport, technology)
 High-value, niche domain services (F&A, ITO, LSO, Legal Services, KPO)
- Next-gen digital contact center capabilities
- Compelling investor guarantees and GBS incentives

 Top 1 Most Favourable Global BPO Location (2021, Ryan Strategic Advisory)
- Top 2 Most Favourable Global BPO Locations (2018, 2019 & 2020, Ryan Strategic Advisory)
- Top 5 Preferred Global HRO Locations (2019, Knowledge Executive)
- Top 10 Preferred Global F&A Locations (2018 & 2019 Knowledge Executive)
- ITU Ranking: 92
- 2020 Tech Readiness Ranking 76 (World Economic Forum)
- 2019 Global Competitiveness Ranking 60 (World Economic Forum)





Senegal



- Emerging as a strong French alternative market for BPO services
- Developed onshore and offshore capabilities
- Ongoing investment in BPO/ICT development
- Emerging KPO expertise
- ITU Ranking: 142

Ghana

- 2020 Tech Readiness Ranking 100 (World Economic Forum)
- 2019 Global Competitiveness Ranking 114 (World Economic Forum)

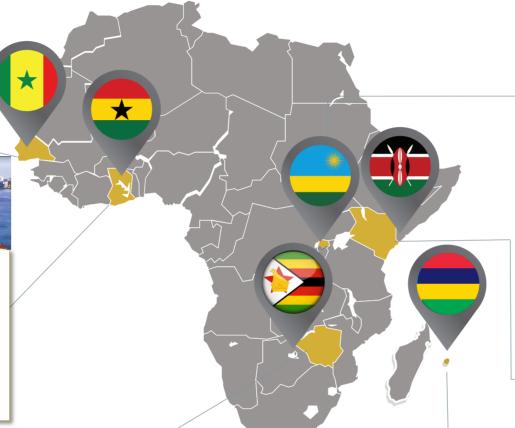


Scalable pool of English-speaking talent

- Growing youth population
- High-energy, friendly and computer-literate talent
- Demonstrated investor willingness
- Accent neutrality and infrastructural challenges are a cause for concern.
- ITU Ranking: 116
- 2020 Tech Readiness Ranking 98 (World Economic Forum)
- 2019 Global Competitiveness Ranking 111 (World Economic Forum)

EMERGING GBS

AFRICAN MARKETS



Zimbabwe

- Bold GBS development plans
- Strong enabling environment (CCAZ, CICM)
- Highly educated talent for niche services
- Infrastructure and political environment are cause for concern
- ITU Ranking: 136
- 2020 Tech Readiness Ranking 126 (World Economic Forum)
- 2019 Global Competitiveness Ranking 127 (World Economic Forum)

Mauritius



- Burgeoning GBS market
- Strong investor preferences and friendly regulatory environment
- High performer in back office and data management services
- Excellent ICT and cyber facilities
- ITU Ranking: 136
- 2020 Tech Readiness Ranking 126 (World Economic Forum)
- 2019 Global Competitiveness Ranking 52 (World Economic Forum)

Rwanda



- Competitive labour costs
- French-speaking talent
- Growing English talent pool
- Reliable ICT infrastructure becoming a cyber hub in the region
- Ease of doing business
- Collaborative support and incentives from government and development agencies
- ITU Ranking: 153
- 2020 Tech Readiness Ranking 96 (World Economic Forum)
- 2019 Global Competitiveness Ranking 100 (World Economic Forum)

Kenya



- Growing GBS track record
- Growing domestic GBS market pivoting into international market
- Well educated English-speaking talent
- Low cost of labour
- Reliability of infrastructure is a concern
- ITU Ranking: 138
- 2020 Tech Readiness Ranking 82 (World Economic Forum)
 - **2019 Global Competitiveness Ranking 95** (World Economic Forum)



AFRICA CONTACT CENTER AND BPO SERVICE CAPABILITY

African countries have the critical skills required to deliver high-end contact center and customer lifecycle management services for enterprise buyers and organizations located in North America, Australia, Middle East and Europe. A broad variety of Business Process Outsourcing (BPO) services are offered by African countries and are reflected below.

BPO Capabilities

- Accent neutrality and adaptability
- Empathy and friendliness
- Resilience
- Computer literacy
- Deep product/service knowledge
- Adaptability and flexibility
- Multilingual capabilities

Some BPO Roles

- Contact/call center agents
- Contact/call center managers
- Inbound/outbound customer service agents
- Inbound/outbound sales agents
- Data collectors
- Quality analysts
- Lead generators
- Client retention specialists
- Customer lifecycle managers

BPO Services

- Inbound and outbound calls
- Data entry and management
- Sales and conversion
- Lead generation
- Customer administration
- Complaints handling
- Customer retention
- Customer churn and win-back



Outsourced Role	Europe*	Africa*	% Difference
Contact Center Agents	£2145 per month	€307 per month	-86%
Contact Center Managers	£5080 per month	€1107 per month	-78%

Outsourced Role	US*	Africa*	% Difference
Contact Center Agents	\$2330 per month	\$367 per month	-84%
Contact Center Managers	\$5520 per month	\$1323 per month	-76%

Outsourced Role	₩ UK*	Africa*	% Difference	
Contact Center Agents	£1400 per month	£262 per month	-81%	
Contact Center Managers	£3300 per month	£946 per month	-71%	

Contact center and BPO salaries in Africa are highly competitive when compared to the European Union, United States and United Kingdom. On average, contact center agent salaries are 84% less than those of key global source markets. Moreover, contact center managers in Africa are paid 75% less, on average, compared to those in key global source markets.





AFRICA BUSINESS PROCESS AND SPECIALIST

SERVICE CAPABILITY

BPS Capabilities

- Social media analytics
- Data analytics
- Internet of Things (IoT)
- Predictive IVR routing
- Machine learning
- Robotic process automation (RPA)
- Transaction and claims processing

Some BPS Specialist Roles

- Big data analyst
- Behavioural analyst
- Actuarial accountant
- Technical accountant
- Internal auditor
- Compliance trainer
- Application developer
- Claims processor
- Software developer
- Legal specialist

BPS Services

- IT Outsourcing (ITO)
- Legal Process Outsourcing (LPO)
- Finance & Accounting Services (F&A)
- Recruitment Process Outsourcing (RPO)
- Learning Services Outsourcing (LSO)
- Research Services
- Knowledge Process Outsourcing (KPO)
- Procurement Outsourcing



Outsourced Role	EU*	Africa*	% Difference
IT Help Desk Agent	€2573 per month	€341 per month	-87%
Data Analyst	€3189 per month	€418 per month	-87%
Software Developer	€3277 per month	€552 per month	-83%

Outsourced Role	US*	Africa*	% Difference
IT Help Desk Agent	\$2998 per month	\$405 per month	-87%
Data Analyst	\$5134 per month	\$497 per month	-90%
Software Developer	\$6041 per month	\$656 per month	-89%

Outsourced Role	≱ ⊭ UK*	Africa*	% Difference
IT Help Desk Agent	£2085 per month	£292 per month	-86%
Data Analyst	£2308 per month	£358 per month	-84%
Software Developer	£2588 per month	£473 per month	-82%

Like the BPO market, the African BPS industry is highly competitive in terms of salaries. African IT help desk agents are 86% more competitive than the European Union, United States and United Kingdom markets. Additionally, Africa is more competitive than in terms of salaries and labor costs for data analysts (-87%) and software developers (-85%).

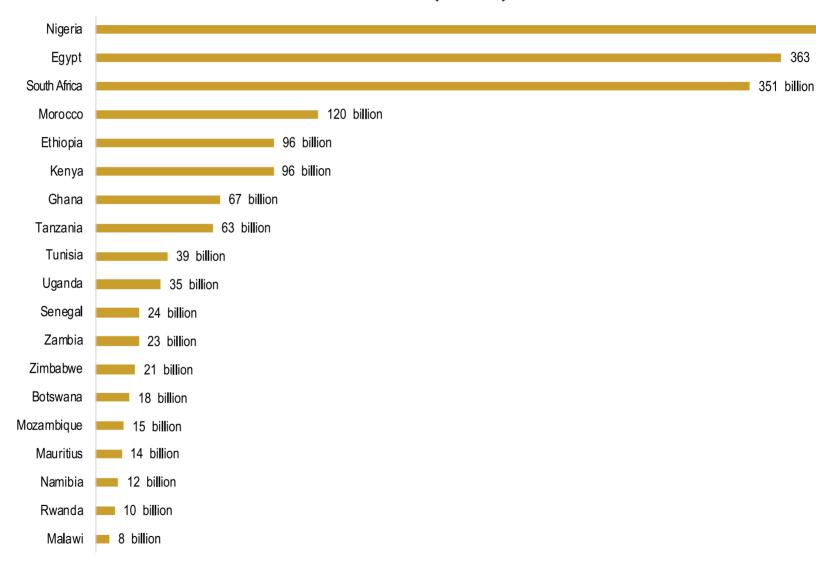




AFRICA GROSS DOMESTIC PRODUCTS

Total GDP (2020)

Nigeria has the largest GDP of US\$448 billion, followed by Egypt (\$363 billion) and South Africa (\$351 billion). Malawi is the smallest economy with a GDP of \$8 billion. Rwanda (\$10 billion) and Namibia (\$12 billion) are placed in second and third last respectively.

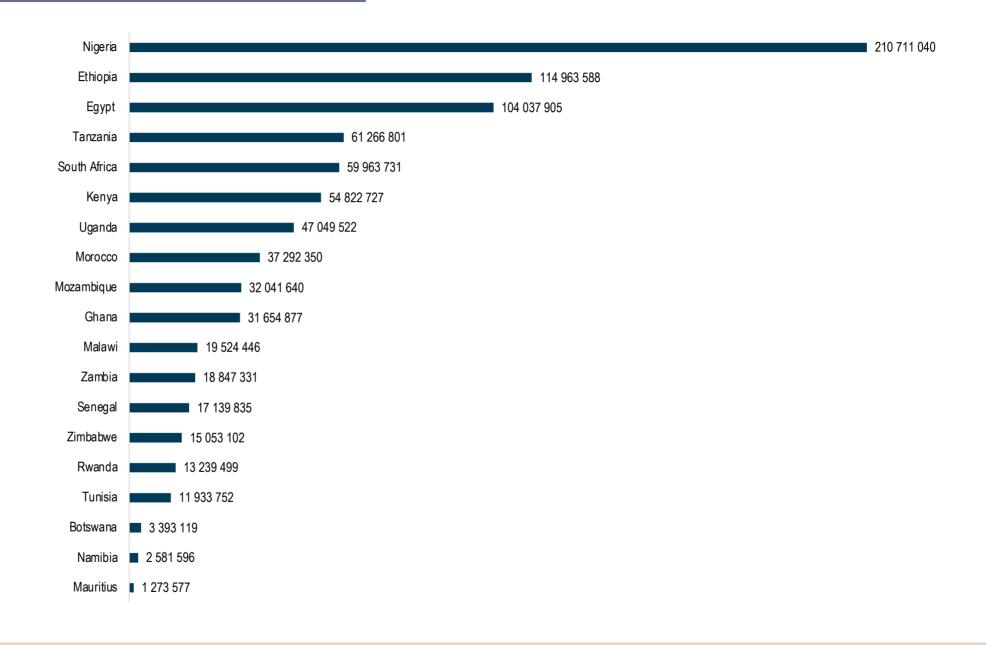


448 billion

363 billion

AFRICA COUNTRY POPULATIONS

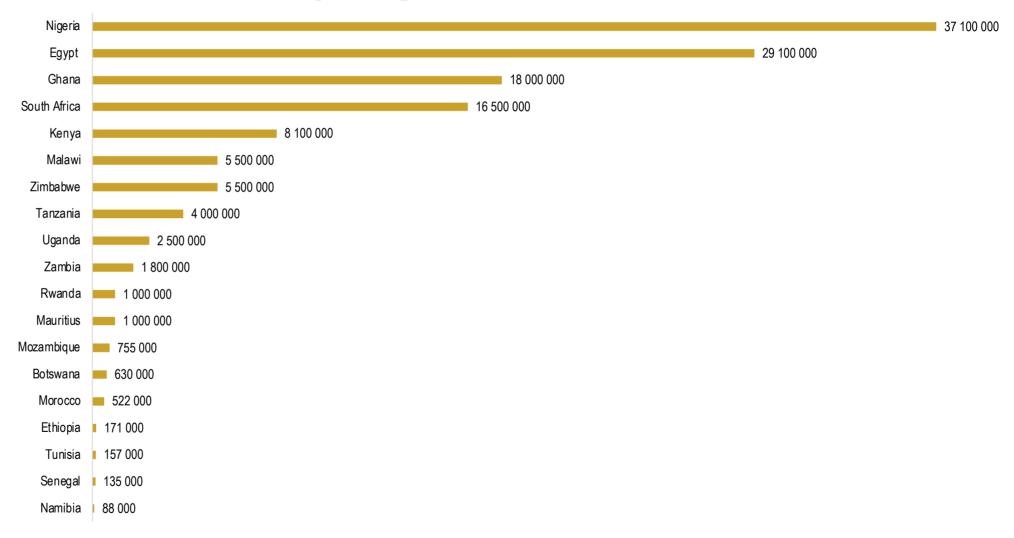
Nigeria has the highest population in Africa with a significant margin of almost 95 million people. For its geographic size, Ethiopia is the one of the most densely populated countries in Africa and is the second-most populated African location. Egypt follows closely behind as the third-most populated. Mauritius, Namibia and Botswana are the least-populated countries.



AFRICA ENGLISH SPEAKING POPULATIONS

With its large population and being a former British colony, Nigeria (39.1 million) has the largest number of English speakers. The West African nation is followed by Egypt (29.1 million) by an 8 million margin. Ghana (18 million) has the third largest number of Englishspeaking capabilities and South Africa has 16.5 million. Namibia (88,000), Senegal (135,000) and Tunisia (157,000) have the lowest number of Englishspeakers.

English Speakers

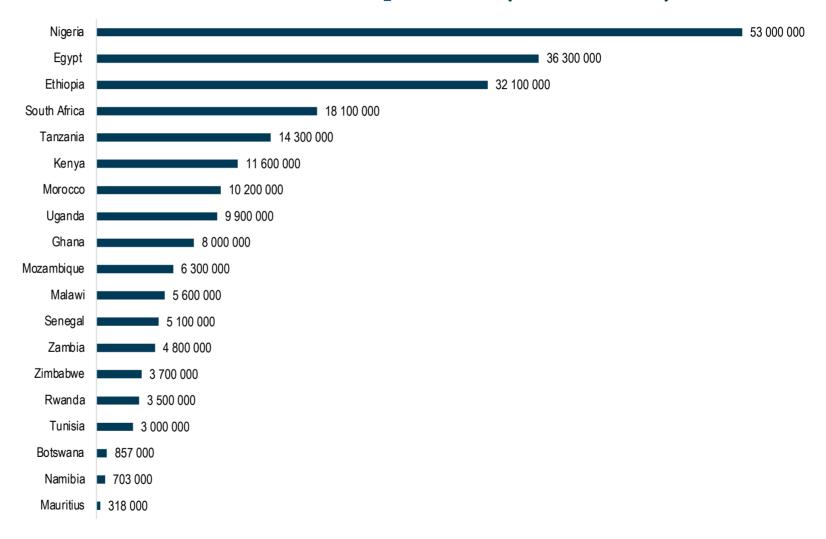




AFRICA ENGLISH YOUTH POPULATIONS

Nigeria (53 million) has the highest number of youth aged between 18-35 years old. Egypt (36.3 million) and Ethiopia (32.1 million) have the second and third-largest youth population, respectively. Mauritius (318,000) has the lowest youth population by a significant margin from the second-lowest nation, Namibia (703,000) and Botswana (857,000).

Estimated Youth Population (18 -35 Years)







Most African countries have road, rail and seaport infrastructure in place. On average, only a quarter of roads in Africa are paved. However, according to the World Economic Forum's Current State of Transport Infrastructure in Africa, there are six countries in Africa that are above the global average, including Morocco, Tunisia, Egypt, Namibia, South Africa and Swaziland.

AFRICA TRANSPORT INFRASTRUCTURE



There are over 448 road and rail projects across Africa with a total investment value of US\$430,3 billion.



Nigeria has the highest number of projects (49) valued at US\$48,3 billion.



Egypt, which has 20 road and rail projects in the pipeline, has the highest value in these projects, amounting to US\$52,9 billion.

Transport means and costs for customer service agents and workers to get to from work include:



Transport fees by bus are as follows:
Minimum price of \$0.55 - Maximum price of \$3



Transport fees by mototaxi are as follows:
Minimum price of \$1 Maximum price of \$10





AFRICA COMMERCIAL PROPERTY











Average rentals: \$21 - \$59+ per sqm

Commercial properties for sale: \$430,000 -\$5,4+ million

There are available offices to rent and buy in Africa,

but A grade office rentals can be high:

Typical accommodation rates: From \$26 per night upwards









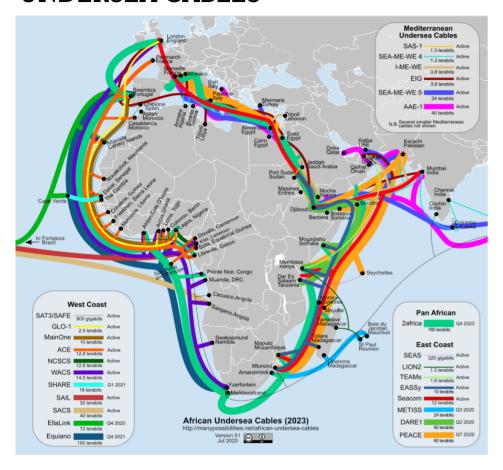






AFRICA ICT INFRASTRUCTURE

UNDERSEA CABLES



Source: 2021 Many Possibilities African Undersea Cables

- Africa's high rates of GDP growth has led to a rapid increase in the connection of undersea cables over the past 10 years.
- 37 out of 38 coastal African countries are connected by at least one submarine cable landing. 11 of these countries have one subsea cable, 10 have two subsea cables, 6 have three subsea cables and 10 have more than three subsea cables.

Services available	Poor	Satisfactory	Good	Pricing
Internet services			Good	60 Mbps, uncapped
				\$1,200 per month
VolP			Good	\$0,18 per minute
Mobile comms			Good	\$0,03 per minute (local)
				\$0,25 per minute (international)
Fixed line		Satisfactory		\$0.07 per minute
Fibre		Satisfactory		\$128 per month for 25 Mbps, uncapped
Wireless			Good	\$70 for 100GB of data per month

AVERAGE TECHNOLOGY AND **COMMUNICATIONS COSTS**





AFRICA RISK MANAGEMENT AND COMPLIANCE

COMPLIANCE AND REGULATION



GDPR compliant

World renowned data protection laws aligned to UK and EU



ISO certified

Global pioneer and leader in international Customer Contact Centre Standard ISO 18295-1:2017



International Organization for Standardization

ISO/IEC certified

service providers in the country

27001 for data security controls and mechanisms



certified
service providers in the country

ISO 9001:2015 for quality management



United Kingdom Accreditation Service



BSI

British Standards Institute accreditation



PCI-DSS

compliance for handling credit card information



CIPs

procurement and supply standards



IFRS

global accounting standards



Sarbanes-Oxley Act of 2002 Compliance for protection of shareholders



regulatory compliance for bank capital adequacy, stress testing, and market liquidity risk

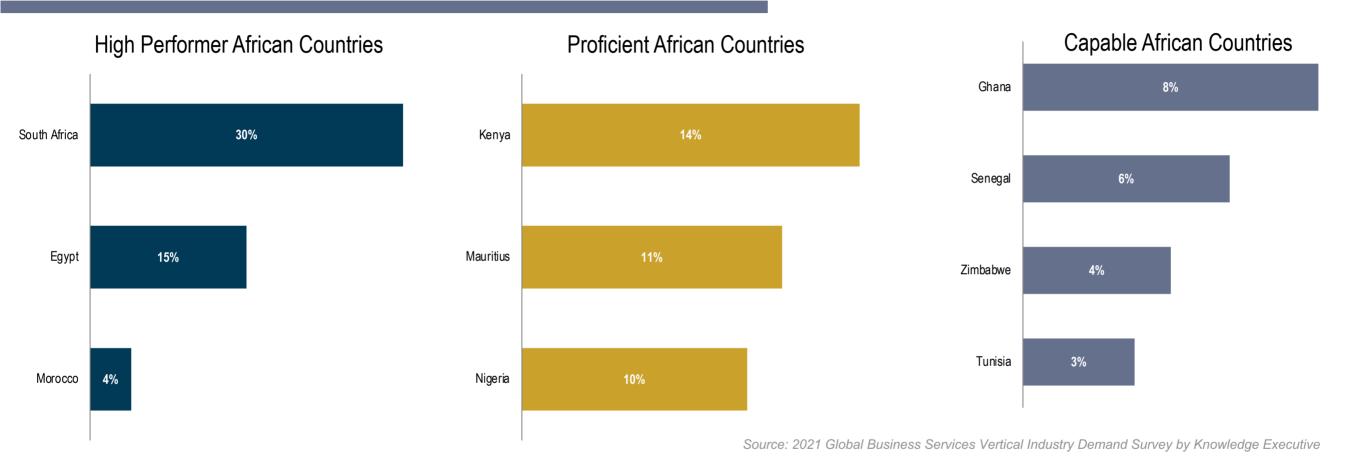






CONTACT CENTER VOICE SERVICES TOP 10 RANKINGS

FOR OFFSHORE SERVICE DELIVERY



Over 140 global buyers and enterprise executives of organizations that outsource and offshore to Africa were asked to rank and rate each African country (all 54 countries), including service level delivery across various key business process areas. As a result, the top 10 countries were ranked according to their final scores and placed within three categories: **High Performer, Proficient and Capable**.





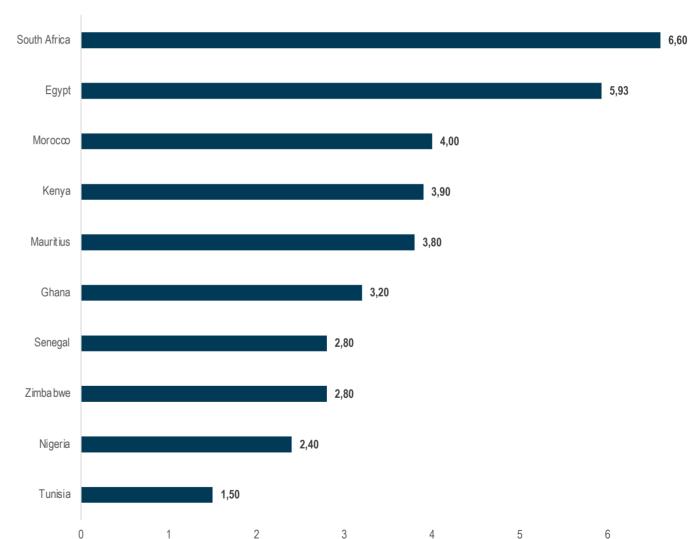
CONTACT CENTER VOICE SERVICES TOP 10 RANKINGS

FOR OFFSHORE SERVICE DELIVERY

South Africa leads the overall rankings for **contact center voice service delivery**, with a score of 6.60. Egypt (5.93) and Morocco (4) are ranked second and third, respectively. Tunisia is ranked last, with a score of 1.50. Nigeria (2.40) and Zimbabwe (2.80) have the third and second-lowest ratings, respectively.

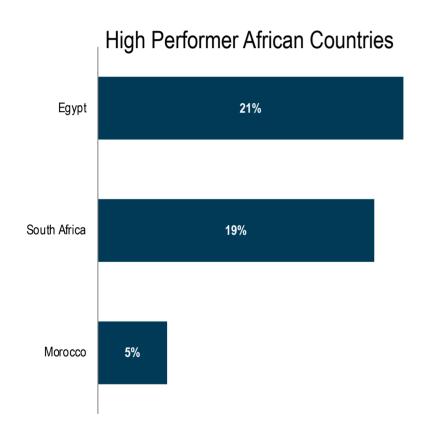
Based on the opinions and preferences of over 140 enterprise executives in Australia, Canada, France, Germany, the United Kingdom and the United States from organizations that offshore services to African locations.

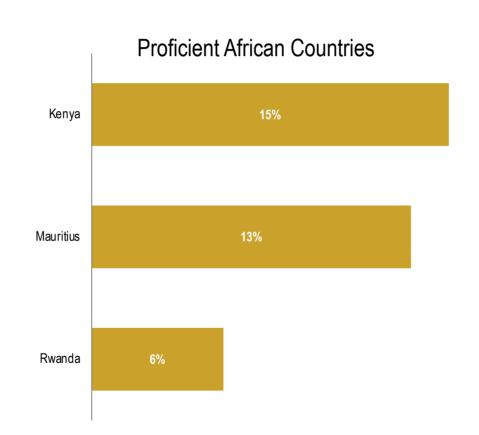


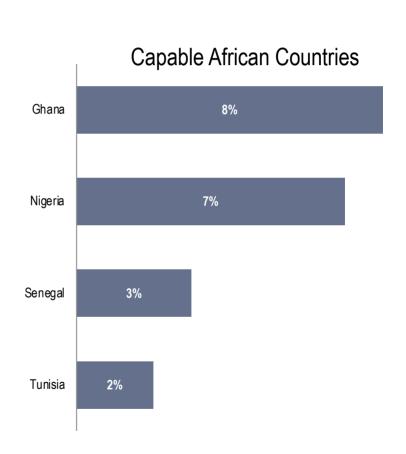


DIGITAL CONTACT CENTER SERVICES TOP 10 RANKINGS

FOR OFFSHORE SERVICE DELIVERY









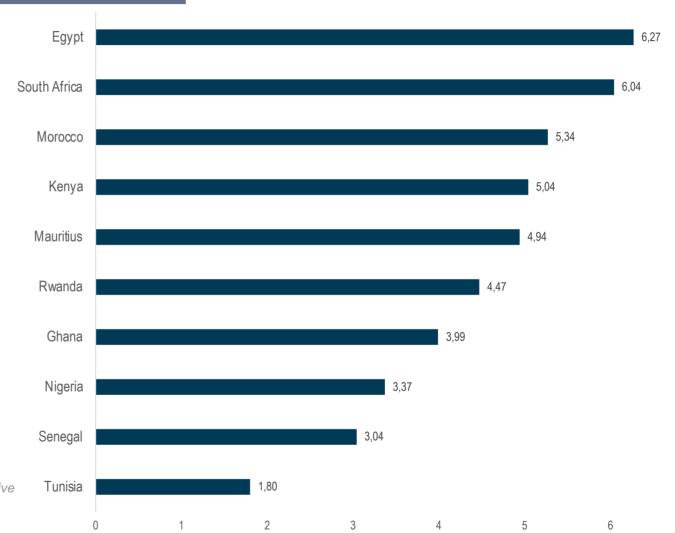
DIGITAL CONTACT CENTER SERVICES TOP 10 RANKINGS

FOR OFFSHORE SERVICE DELIVERY

Combined Score out of 8

Renowned for its digital and IT-enabling services Egypt (6.27) took first place for **digital contact center services**, followed closely by South Africa (6.04). Morocco (5.34) took third place, followed by Kenya (5.04).

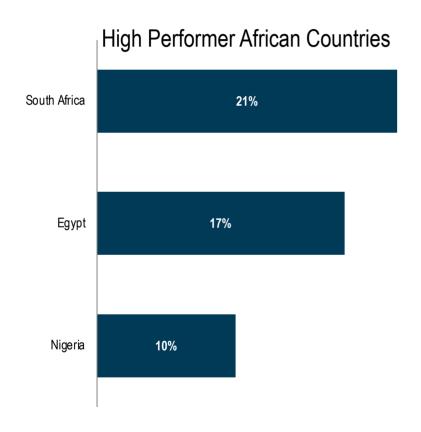
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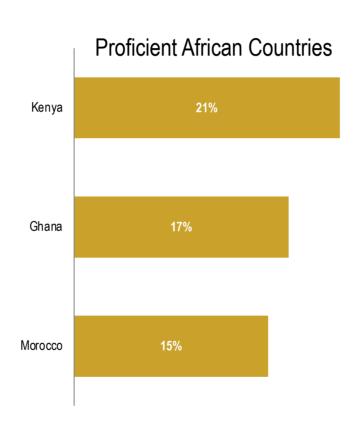


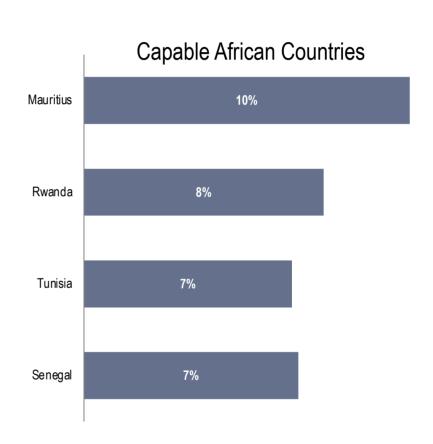


BACK OFFICE PROCESSING TOP 10 RANKINGS

FOR OFFSHORE SERVICE DELIVERY









BACK OFFICE PROCESSING TOP 10 RANKINGS

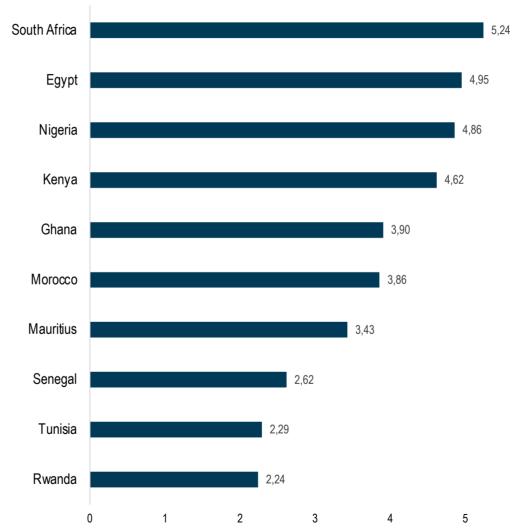
FOR OFFSHORE SERVICE DELIVERY

Enterprise executives in Australia, Canada, France, Germany, the United Kingdom and the United States were also asked to score and rank offshore African locations where they currently outsource or co-source back office processes.

South Africa was noted as a leading destination for back office processing service delivery, scoring 5.24 out of 8 along with Egypt with a score of 4.95, followed by Nigeria (4.86).

Based on the opinions and preferences of over 140 enterprise executives in Australia, Canada, France, Germany, the United Kingdom and the United States from organizations that offshore services to African locations.

Combined Score out of 8

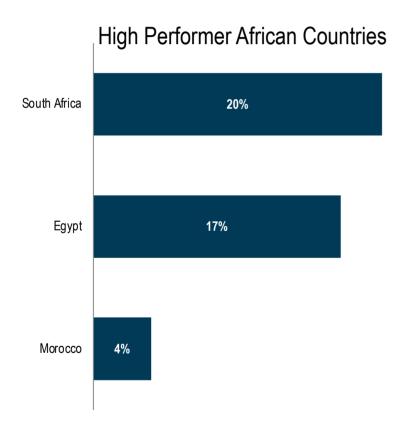


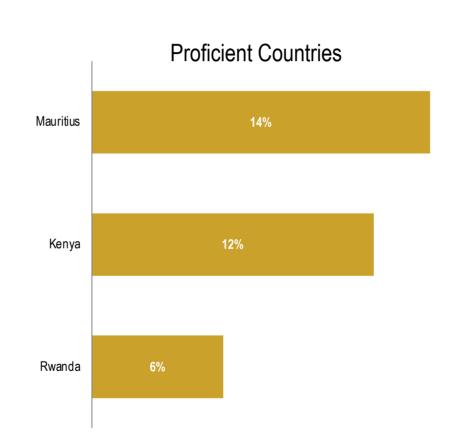


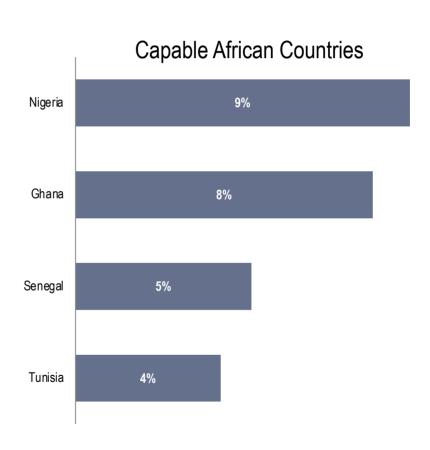


CUSTOMER ADMINISTRATION TOP 10 RANKINGS

FOR OFFSHORE SERVICE DELIVERY









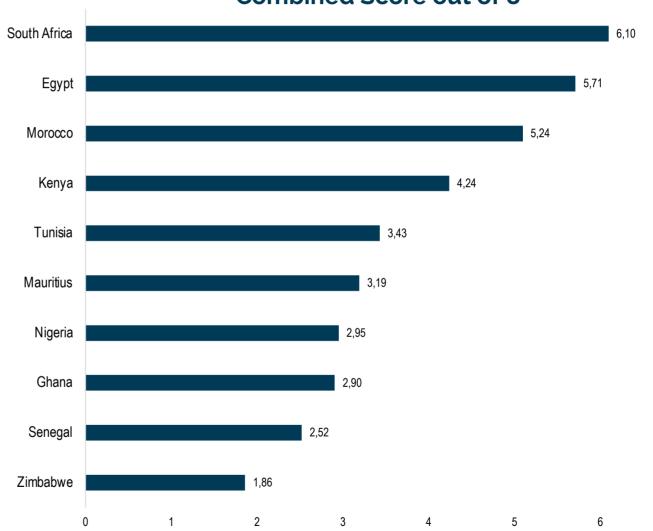
CUSTOMER ADMINISTRATION TOP 10 RANKINGS

FOR OFFSHORE SERVICE DELIVERY

South Africa was ranked first in the **customer administration service delivery** rating, with a score of 6.10 out of 8. Egypt (5.71) was ranked a close second, followed by Morocco (5.24).

Based on the opinions and preferences of over 140 enterprise executives in Australia, Canada, France, Germany, the United Kingdom and the United States from organizations that offshore services to African locations.

Combined Score out of 8

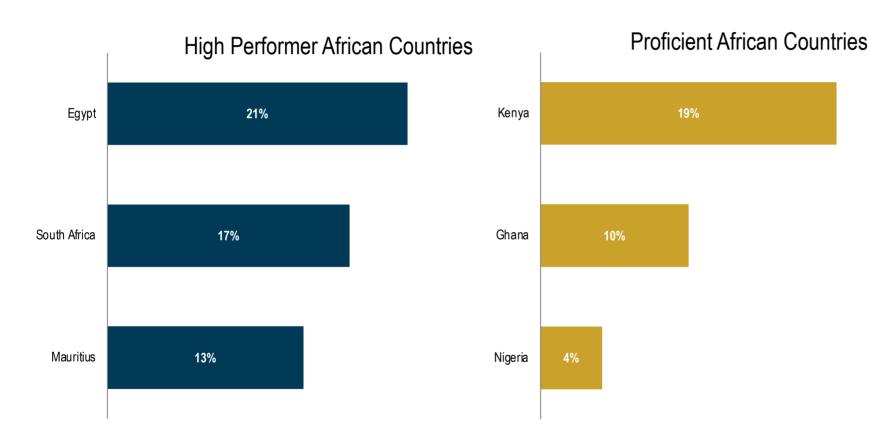


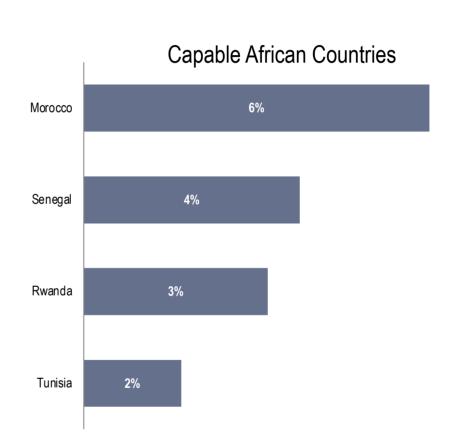




DATA MANAGEMENT TOP 10 RANKINGS

FOR OFFSHORE SERVICE DELIVERY







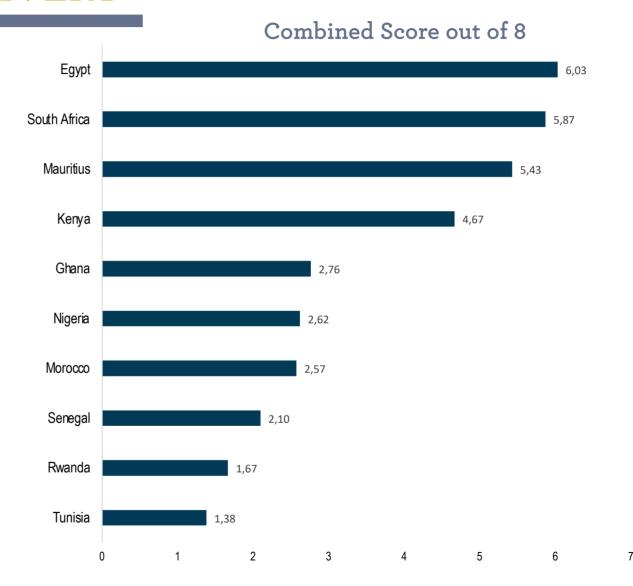
DATA MANAGEMENT TOP 10 RANKINGS

FOR OFFSHORE SERVICE DELIVERY

Egypt scored the highest for the delivery of **data management services**, with a score of 6,03.

South Africa was ranked second, with a score of 5.87, followed by Mauritius, with a score of 5.43.

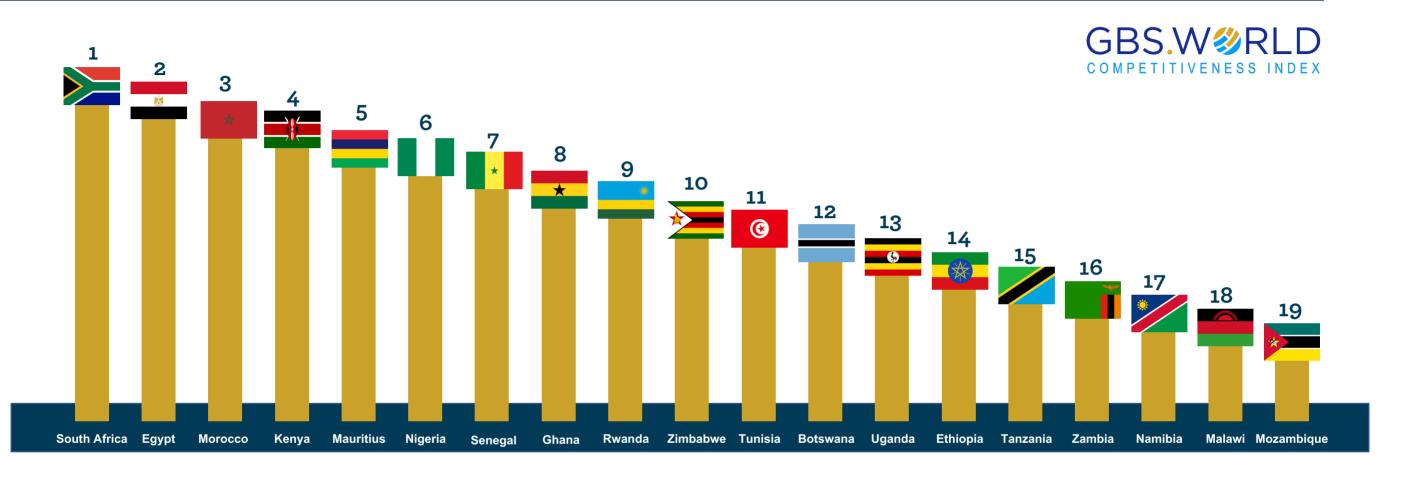
Based on the opinions and preferences of over 140 enterprise executives in Australia, Canada, France, Germany, the United Kingdom and the United States from organizations that offshore services to African locations.







GBS WORLD COMPETITIVENESS INDEX - AFRICA



Methodology: the index and rankings have been drawn from extensive survey data from the annual Knowledge Executive GBS Vertical Industry Demand Survey wherein global clients and enterprises that outsource to Africa ranked and rated their experience with high performing, proficient and capable offshore locations on the continent. Additional analyses were conducted on each country's talent pools, skills development initiatives, youth populations, ICT infrastructure, transport systems, multilingual capabilities, labour costs, specialist BPS services, BPO and CX capabilities, economic and political stability. Tallied results established the final competitiveness scores across the top 19 African GBS locations.



BUYER TRENDS

GLOBAL



BUYER TRENDS AND REQUIREMENTS

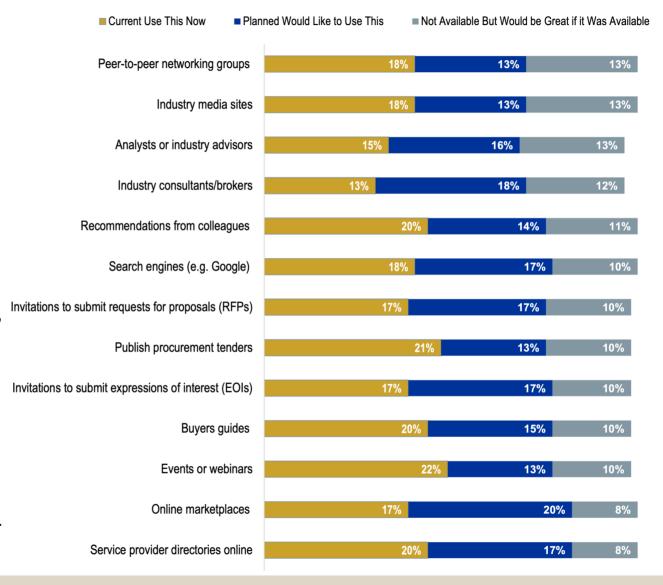
To uncover buy-side demand and trends, 360 enterprise buyers were interviewed for the global vertical industry demand survey in Australia, Canada, Germany, France, the United Kingdom and the United States.

The graph on the right shows the different channels enterprise buyers utilise when sourcing back office processing and CX services and suitable service providers. In addition, buyers indicated what sourcing channels they plan to use and what channels are not available but would be beneficial if it were.

The most popular sourcing channels that enterprise buyers currently make use of include events/webinars and publishing procurement tenders/RFPs. Recommendations from colleagues, peer-to-peer networking groups and buyers guides are also popular sourcing channels.

Online marketplaces are what most enterprises plan to utilize, followed by industry consultants/brokers. Service provider directories online, invitations to submit expressions of interest (EOIs) and invitations to submit requests for proposals (RFPs) are other sourcing channels that enterprises plan to use in the future.

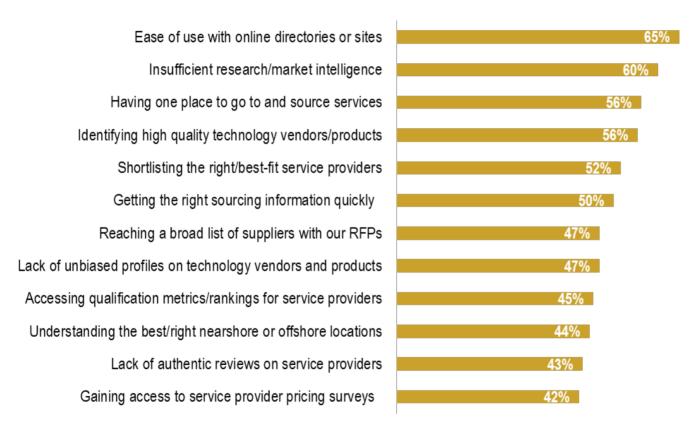
How, and where, do you currently source back office processing and CX services/suitable service providers?





BUYER TRENDS AND REQUIREMENTS

What pain points/challenges do you experience on the journey to locate suitable outsourced service providers?



Enterprise buyers were asked to rate their biggest pain points/challenges they experience when locating a suitable service provider. Ease of use with online directories or sites was rated as the most challenging part of the journey. Insufficient research/market intelligence and having one place to go to and source services were among the top three greatest pain points when searching for a suitable outsource service provider.

Other challenging factors in the search for suitable outsource service providers consist of gaining access to service provider pricing surveys, lack of authentic reviews on service providers and understanding the best/right nearshore or offshore locations.

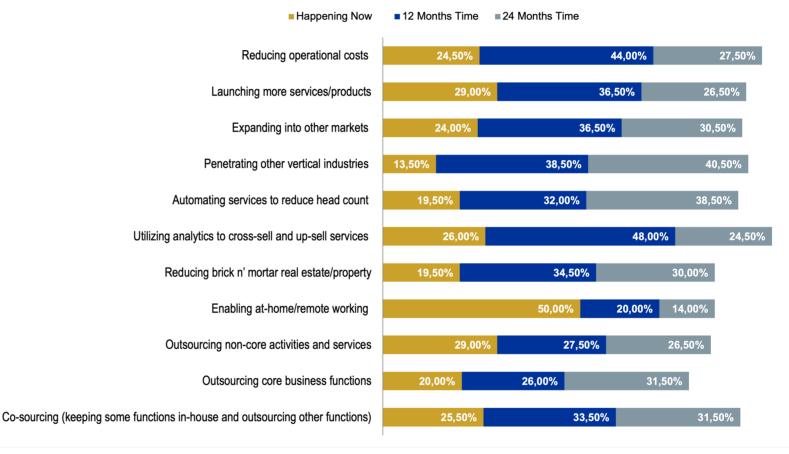


BUYER TRENDS AND REQUIREMENTS

Enterprise buyers were asked to indicate how their organization plans to reduce costs and increase profitability over the next 12-24 months. Enabling at-home/remote working is the most popular method of reducing costs among the responding enterprises. Buyer enterprises and even GBS operators themselves have found that their operations performed well after the WFH transition, while simultaneously significantly reducing real-estate costs.

Launching more services/products was the second-most implemented strategy of reducing costs and increasing profitability. Co-sourcing (keeping some functions in-house and outsourcing other functions) is ranked third as a cost reducing, profit-enhancing strategy currently being undertaken by buyers. Enterprises see outsourcing as a way to reduce costs and mitigate the effects of future disruptions in the economy.

How does your organization plan to reduce costs and increase profitability in the next 12 – 24 months?



Utilizing analytics to cross-sell and up-sell was indicated as the most popular cost reduction and income generation method to be implemented the next 12 months. Penetrating other vertical industries was indicated as the most popular cost saving and profit enhancing strategy buyers would implement in the next 24 months. This is followed by automating services to reduce headcount, linking with the trend of digitization.





BUSINESS PROFILES

AFRICA GBS SERVICE PROVIDERS





Ascensos



Vertical Industries Serviced

- Financial Services
- Retail & E-Commerce
- Healthcare
- Insurance
- Technology
- Telecommunications

GBS And/Or CX Services

- Business Process Outsourcing
- Customer Solutions
- Customer Experience
- Multilingual Customer Support
- Back Office Support
- Technical Support Services

Number of Locations	5
Major Points of Presence Globally	Scotland, England, Romania & Turkey
Major Points of Presence in Africa	South Africa, Cape Town
Operating Years	8+
Total Seats/Agents/Knowledge Workers	150+ Africa 3000+ Globally
Global Markets Serviced	UK, Europe

Organization Bio

We simply don't believe in an 'off-the-shelf' approach when it comes to delighting with an effortless customer experience.

Ascensos specialise in delivering bespoke future-first solutions. Since 2013, we have been the trusted partner for many global brands who seek to transform their customer experience through a fresh and personal approach to customer care.

As a 'best in Europe' industry benchmark, we can support the delivery of a world-class omnichannel experience, the advancement of your current customer service levels, or the flexibility to scale. Our enhanced digital and Al propositions offer capabilities that extend to fully integrated technologies offering digital, predictive and autonomous CX solutions.

We set out to become the go-to-market experts from our Scottish Headquarters in Motherwell. Nine years later, Ascensos has grown exponentially, and our latest expansion to South Africa is a milestone that perfectly illustrates our 'born local, grown global' approach to business.

Customer Service Channels

- Voice
- Email
- Social Media
- Website

- Omnichannel Customer Solutions
- Digital Transformation
- Interactive Voice Response
- Call Centre Solutions
- Customer Insights & Analytics



BPESA



South Africa offers the Global Business Services market, real value as a delivery location with a large availability of good quality English speaking talent with high empathy, cultural affinity, and niche domain skills, which have led to success in next generational service delivery.



Major Points of Presence Gauteng, Eastern Cape, Western Cape, Kwazulu-Natal Operating Years 19 - 20 Total Seats/Agents/Knowledge Workers Global Markets Serviced USA, UK, Australia, Canada, Asia, Europe Organization Bio

South Africa offers the Global Business Services markets real value as a delivery location with a large availability of good quality English speaking talent with high empathy, cultural affinity, and niche domain skills, which have led to success in next generational service delivery.

BPESA is the recognised Industry Body and Trade Association for the Global Business Services (GBS) Sector in South Africa. As a not for profit entity, BPESA was established to promote trade and serve the interests of its many stakeholder groups engaged in the development, growth and sustaining of this vibrant sector that cuts across many industry verticals of the economy.

BPESA's mission is to create a trading environment in the Global Business Services Sector in South Africa that is conducive for inclusive and collaborative growth at scale, underpinned by the sustainable supply of workplace skills for the future, a culture of innovation, and a drive for continuous improvement across the supply chain.

Vertical Industries Serviced

- Retail & eCommerce
- Utilities & Energy
- Telecoms
- Insurance
- Technology and Software
- Logistics & Supply Chain
- General BPO & Contact Centre Services
- Banking & Financial Services
- Travel & Leisure
- Healthcare & Medical
- Media & Publishing

GBS And/Or CX Services

- FDI Support
- Business Eco System Support
- Country Talent Development
- Innovation & Entrepreneurship Support

Customer Service Channels

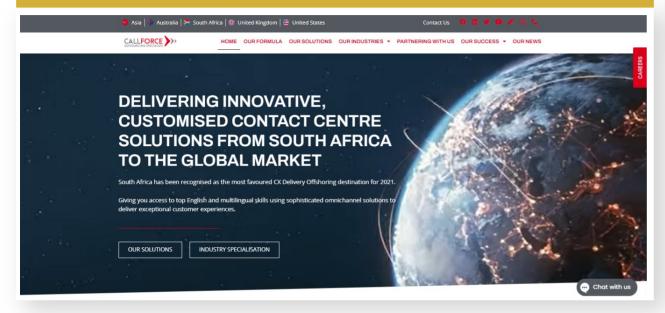
Number of Locations in Country:

- Voice
- Email
- Social Media
- Instant Messaging
- Website

- Member Portal
- Omnichannel Communications
- Webinars
- Virtual meeting platforms



CallForce



Number of Locations in Country:	3
Major Points of Presence	Durban, Cape Town, Johannesburg
Operating Years	22
Total Seats/Agents/Knowledge Workers	1 000+
Global Markets Serviced	US, UK, Australia, New Zealand, South Africa, Asia Pacific

Organization Bio

CallForce services and supports businesses all over the globe in successfully co-creating, implementing and managing sophisticated, industry-specific, omnichannel BPO solutions delivered from South Africa.

Delivering innovative contact centre solutions and BPO services from South Africa to the global market is our focus as we cost-effectively streamline your operations while keeping you ahead of the curve and outperforming your competitors. We carefully reassess the current operations of your contact centres and rebuild a cost-efficient, customised, outsourced BPO solution that gives you:

- A competitive edge
- · Higher CSAT/NPS scores
- · Significant cost savings through increased efficiencies and productivity
- Excellent customer retention ratios
- Higher propensity to gain wallet share

Vertical Industries Serviced

- Telecommunications
- Financial Services
- eCommerce
- Edtech
- Logistics
- Energy
- Other

GBS And/Or CX Services

- Inbound and Outbound Customer Service
- Inbound and Outbound Sales
- Tier 1, 2 & back line technical support
- Client relationship management
- Human Resource Management
- Virtual Learning
- Retail- Frontline and Service support
- Lead Generation
- Collections
- Back Office Administration
- Finance Administration

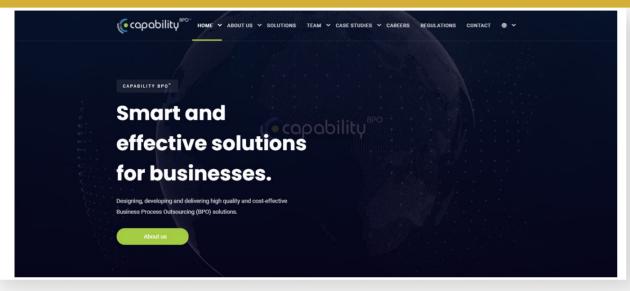
Customer Service Channels

- Voice
- Video
- Email
- Web Chat
- Live Chat
- Website
- Social Media Response Handling
- Self Service

- Full Self -Service IVR's
- Artificial Intelligence
- Sentiment Analytics
- Machine Learning
- Digital Engagement
- Chat Bots
- Omnichannel Integration
- Automated QA
- Robot Process Automation (RPA)
- Voice Analytics
- Business Intelligence
- Knowledge & Workforce Management
- Digital Performance Management



Capability BPO



Vertical Industries Serviced

- Banking & Financial Services
- Retail & eCommerce
- Telecommunications

GBS And/Or CX Services

- Business Process Outsourcing (BPO)
- Contact Centre
- Customer services
- Query Resolution Services
- Anonymous Whistleblowing Line
- Debt Collections
- Inbound
- Outbound
- Social Development
- Data analysis

Number of Locations in Country:	1
Major Points of Presence	Kwa-Zulu Natal, Western Cape, Mpumalanga (Impact Sourcing BPO Centre)
Operating Years	14
Total Seats/Agents/Knowledge Workers	800-1000+
Global Markets Serviced	North America, UK, Ireland, New Zealand and Australia

Organization Bio

Originating as a professional financial services company providing debt recovery solutions to public and private entities alike, we have been in the business of helping businesses since 2008. Expanding our business into International markets we founded Debt-IN Consultants (PTY) Ltd T/A Capability BPO™ in 2018, landing our first international client, a global e-Commerce marketplace provider in the same year. A global boutique customer experience solutions partner, serving both domestic and international markets, we specialize in the financial services and e-commerce sectors, delivering Customer Care and Query Resolution Services to both local and global organizations, with our operations spanning across two metropolitan areas, Kwa-Zulu Natal, and the Western Cape. Capability Impact, launching in 2022, is our impact sourcing initiative. A start-up BPO contact centre servicing international and domestic markets, set in the heart of Hazyview, Mpumalanga (near the Kruger National Park).

Capability BPO™ is committed to operational and service excellence, continuous improvement, and developing innovative solutions that drive customer satisfaction, loyalty, and advocacy. This is demonstrated through our foundation of quality principles, certifications, and way of working through ISO27001, PCI DSS, POPIA, GDPR and COPC©.

We truly partner with our clients by gaining an in-depth understanding of their customer touchpoints, co-designing solutions to achieve their business goals.

Customer Service Channels

- Voice
- Web Chat
- Social Media
- Omnichannel
- Web channels
- Instant Messaging

- Chat Bots
- Multichannel Communications
- Cloud Technology
- CRM
- Al
- RPA
- Analytics
- Performance Management Tools



CCI South Africa



Vertical Industries Serviced

- Telecommunications
- E- commerce & Retail
- · Banking & Fin-Tech
- · Healthcare & Insurance
- Airlines
- Leisure
- Security
- Energy
- Media & Entertainment

Our Expertise

- Lead Generation
- · New Customer Acquisition
- Customer Services
- · Complaint Resolution
- · Billing queries
- · Technical support
- Cross/Upsell, Retention & win-back.
- · Back Office Processing
- Customer Insight & Analytics
- · Workforce Management

Number of Locations Across Africa:	10
Major Points of Presence	Nairobi, Johannesburg, Capetown Durban and more
Operating Years	15+
Total Seats/Agents/Knowledge Workers	11 000+
Global Markets Serviced	USA, UK, Australia and Africa

Organization Bio

The CCI group of companies is the largest provider of customer management services in Africa, supporting domestic and international customers. Headquartered in the UAE the group comprises of several companies across the African continent. CCI services brands in the USA, UK, Australia, South Africa & Kenya

Our continued vision is to be the largest and most respected outsourcer in Africa by offering world class solutions to derive true value for our clients and their customers. Our operations began in 2006 with 5 employees and today our workforce has exponentially grown and made us one of the largest BPO companies in Africa with our largest operating center in South Africa, followed by Kenya.

We are also a recruitment and training centre of excellence. We recruit youth from historically disadvantaged communities, and we train them through job readiness programs. The objective is to ensure that we reduce the unemployment rate in the geographies we operate from by creating jobs and positively impacting the socio-economic status of our employees.

Our focus on people merged with our cost effective client centric operating model has created a business enhancing, multichannel, multilingual delivery center capability based across Southern Africa to service a global customer base 24x7x365.

Omni- Channel Services

- Voice (Inbound & Outbound)
- · Live Chat (On Site & In App)
- Message (SMS, WhatsApp & In App)
- Social Media (Twitter, Facebook, & Instagram)
- · Web Form
- Email

- Interactive Intelligence
- Call Insights & Data Analytics
- Noble Systems
- Multichannel Communications
- Performance Management Tools
- IVR
- Live Chat



Genesys South Africa



Number of Locations in Country:	1
Major Points of Presence	Johannesburg
Operating Years	29 - 30
Total Knowledge Workers	5 000+
Global Markets Serviced	Over 100+

Organization Bio

Every year, Genesys® orchestrates more than 70 billion remarkable customer experiences for organizations in more than 100 countries. Through the power of our cloud, digital and AI technologies, organizations can realize Experience as a ServicesM, our vision for empathetic customer experiences at scale. With Genesys, organizations have the power to deliver proactive, predictive, and hyper personalized experiences to deepen their customer connection across every marketing, sales, and service moment on any channel, while also improving employee productivity and engagement. By transforming back-office technology to a modern revenue velocity engine Genesys enables true intimacy at scale to foster customer trust and loyalty.

Vertical Industries Serviced

- Automotive
- Financial Services, Banking and Insurance
- Public Sector
- Telcos, Communications and Technology
- Hospitality, Leisure and Travel
- Customer Research and Marketing
- Education
- Retail and eCommerce
- Healthcare and Medical
- Media
- Outsourcing
- Utilities and Energy

GBS And/Or CX Services

- Business Process Outsourcing (BPO)
- Enterprise Workload Management
- Interaction Analytics Capabilities
- Proactive Customer Communications

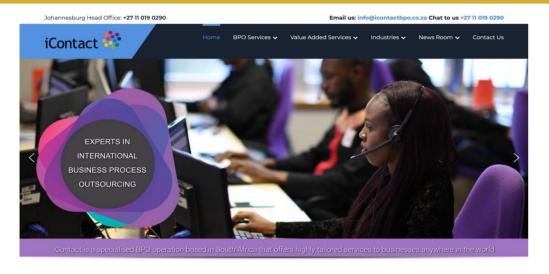
Customer Service Channels

- Voice Inbound and Outbound
- Customer Self-service Voicebots and Chatbots
- Chat Predictive Engagement, Proactive Chat
- Messaging SMS, Social Media, WhatsApp and more
- Email
- SMS

- Genesys Cloud CX
- Genesys Multicloud CX
- Genesys DX
- Business Intelligence
- Interactive Voice Response
- Automatic Call Distribution
- Business Automation
- AppFoundry
- Google Cloud Contact Center Al
- Artificial Intelligence
- Workforce Engagement



*i*Contact



Number of Locations in Country:	2
Major Points of Presence	Johannesburg and Cape Town
Operating Years	6
Total Seats/Agents/Knowledge Workers	500+
Global Markets Serviced	USA, Canada, UK and Australia

Organization Bio

iContact BPO is a specialised BPO operation based in South Africa that can offer highly tailored services to businesses anywhere in the world. We are a large-scale, owner-run operation that can provide specialised agents with specific skill sets. We train and coach our agents to meet your stringent requirements. Our service offering is backed by our bespoke software system and the latest technology. iContact provides customer care, technical support, customer acquisition, analytics, and a range of other BPO/S services. Our affinity with cutting edge Business Intelligence and Information Technology ensures we meet all client needs. Outbound sales, inbound customer support, lead generation, data enrichment and staff fulfilment are some of our core competencies. Our 1,200-seat call centre operates 24 hours a day, 7 days a week, 365 days a year. Our cloud-based ondemand data centre ensures we can offer continuous service. We also have a dedicated disaster recovery centre at an off-site location for business continuity. iContact BPO is ISO-27001, ISO-9001 and PCI-DSS certified.

Vertical Industries Serviced

- Banking & Financial Services
- Insurance
- Telecommunication
- Automotive
- Travel
- Retail
- Medical
- Entertainment
- Hospitality

GBS And/Or CX Services

- Inbound and Outbound Customer Services
- Back-office fulfilment
- Upselling and cross selling
- Win-back programmes and surveys
- List building and lead generation
- Customer retention and loyalty

Customer Service Channels

- Calls
- Webchats
- Emails
- IVR
- Artificial Intelligence e
- Workflow Management

- Interactive Voice Response (IVR)
- Analytical Services and Modelling
- Data Hosting
- Business Intelligence
- Chat Bots
- Our service offering is backed by our bespoke software system and the latest technology



Invest Durban



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Logistics & Logistics Management

Vertical Industries Supported

- ICT & BPO
- Automotive & Allied Industries
- Agri-Processing
- Tourism Asset Development
- Life Science

- General Economic information
- Research on specific sectors
- Introduction to key suppliers, financiers and customers
- Retention and expansion services
- Opportunity identification and development
- Local market analysis
- Site evaluation and selection
- Business establishment assistance
- Investor Aftercare, plus
- Assistance with sourcing accommodation
- Expatriate Taxation
- Departure Co-ordination,

Number of Locations in Country:	1
Major Points of Presence	Durban
Operating Years	5
Total Seats/Agents/Knowledge Workers	11 – 50
Global Markets Serviced	USA, UK, Australia, Europe & more

Organization Bio

Durban's IPA, commonly known to date as DIPA (Durban Investment Promotion Authority), now has the refreshed brand name of "Invest Durban". We act as a partnership between the Metro City Council and the private business sector, offering a free investor advisory service, plus key promotion, facilitation, aftercare services between all investment stakeholders. Invest Durban was recommended by the Durban City Council and organised private business as the "First Stop Shop" to stimulate economic growth and new investment in the Durban metropolis.

Invest Durban works closely with the Department of Trade & Industry including Invest SA, Trade and Investment KZN (TIKZN), the Durban Chamber of Commerce and Industry, the KZN Growth Coalition, and State-Owned Enterprises such as Dube Trade Port, the DBSA, IDC, Eskom & others. Key Partners include the largest Banks, Audit & Advisory Firms, plus sector based organised business bodies working in concert to promote investment in Durban. Invest Durban delivers a world-class Metro based Investor support service, encompassing investment marketing & promotion, plus investment facilitation and retention activities.

Channels Utilised

- Voice
- SMS
- Email
- Website
- Social Media

Technology Utilised

- Omnichannel Communications
- Business Intelligence
- Cloud Technology

KURA

Kura

KURA

WHO NE ARE

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WARRINGTH

CONTRACT OF

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WARRINGTH

IN THE LAST YEAR, WE'VE INVESTED

750,000

HOURS OF DEVELOPMENT TIME IN OUR PEOPLE

Our people attract, support and look after customers, and we have great success rates. Don't just take our word for it though.

VIEW OUR CASE STUDIES

Number of Locations in Country:	6
Major Points of Presence	Durban
Operating Years	15
Total Seats/Agents/Knowledge Workers	2 500+
Global Markets Serviced	UK

Organization Bio

Kura is the UK's Largest Independent Outsourcer. Kura provides award-winning outsourced (and insourced) contact centre service from 10 UK locations as well as from its Kura South Africa site. Its software subsidiary, Inisoft, develops advisor desktop solutions with full omnichannel capabilities, sold globally. Kura & Inisoft create and provide services and solutions to over 50 clients across many industry verticals.

About Us:

We are in business because we want to help people to develop and to reach their full potential. We are building a culture that shifts the mind-set from focusing on "things and stuff" to "people and behaviour". We call this process "Crossing the Bridge". Our Vision is to be recognised as "Unrivalled in Developing People." Working closely with our clients, our operations and our support teams, we consistently deliver top decile performance.

Vertical Industries Serviced

- Telecommunication
- Retail
- Financial
- Banking
- Insurance
- Utilities Energy
- Travel
- Automotive
- Leisure
- Medical
- Entertainment
- Media

GBS And/Or CX Services

- Customer Services
- Payment Support
- Debt Collection
- Social Media and Webchat Management
- Complaints Management
- Customer Insights and Analytics
- Back Office Outsourcing
- 7 Days a Week

Customer Service Channels

- Voice Inbound & Outbound
- Message SMS, WhatsApp & In App
- Email
- Web Form
- Web Chat
- Social Media Twitter, Facebook & Instagram

- Syntelate XA
- Unified Agent Desktop
- Scripting solution
- CRM
- Live Dashboards
- Proactive Contact
- Voice of the Customer
- Voice of the Advisor
- Supervisor
- Data Science
- Process Re-engineering
- CX Improvement Specialists



Merchants SA

We Design,
Build & Operate
Award Winning
Contact Centres



Number of Locations in Country:	3
Major Points of Presence	Johannesburg, Durban, Cape Town
Operating Years	41
Total Seats/Agents/Knowledge Workers	1 001 – 5 000
Global Markets Serviced	USA, UK, Australia, Canada

Organization Bio

Merchants is a leading BPO solution provider specialising in customer experience and customer interactions. We focus on finding and developing the right people for each role, and equip them with the necessary technology to create exceptional customer experiences. As experts in service excellence, we set the standards for global customer satisfaction, client delight and employee engagement.

Today's customers expect to use multiple ways of communicating, making customer experience the most important differentiator for businesses in 2022 and beyond. With over 35 years of expertise in the contact centre industry, we know what works and what doesn't. We are relentless in delivering easy, positive and brilliant customer experiences. We are passionate about people and developing the talent pipeline of tomorrow. Our ability to attract the best talent, coupled with our rich history of success and innovation across different industries around the world, is what differentiates us from our competitors. Our world class professionals have unique industry knowledge and our services range from full service, bespoke design work and consultation services.

Vertical Industries Serviced

- Automotive
- Banking & Financial Services
- Insurance
- Retail & eCommerce
- Technology & Software
- Telecommunications
- Travel & Tourism

GBS And/Or CX Services

- Business Process Outsourcing (BPO)
- Customer Service \$ Support
- Sales & Conversion Services
- Retention, Cross Selling and Up-selling
- Customer Churn & Win-back
- Customer Lifecycle Management
- Digital Services
- Customer Experience Management
- Contact Centre Outsourcing
- Service Desk Outsourcing
- Technology Infrastructure Services
- Workforce & Quality Management
- Digital recruitment platform
- Financial Services

Customer Service Channels

- Voice
- SMS
- Email
- Fax
- Web Chat
- Website
- Social Media
- Post

- Intelligent Assistants/Agents
- Mobile Smartphone Self Service
- Omnichannel Communications
- Predictive Quality Monitoring
- Interactive Voice Response (IVR)
- Outbound Campaign Dialers



Outcess Solutions Nigeria Limited

OUTCESS

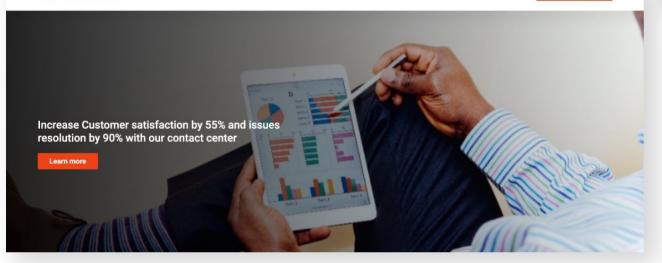
Company

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se Studies

eers REQUEST QUOTE

Be remote ready



Number of Locations in Country:	2
Major Points of Presence	Lagos & Abuja
Operating Years	15 - 16
Total Seats/Agents/Knowledge Workers	250 - 750
Global Markets Serviced	US

Organization Bio

At Outcess, we believe that digital technologies are driving a paradigm shift in how we live, work and play. This shift makes it possible and imperative for businesses to radically reshape how they interact and transact with customers and partners, seamlessly connecting and enhancing all aspects of their operations. Organisations that successfully embrace this shift will reap the benefits of reinventing their businesses, dramatically altering the ways in which they serve their markets, and in the process secure a significant digital advantage. We reckon that organisations of all types and sizes face a dual imperative for success: run better for efficiency and run different for growth. Our innovative and tailor-made approach addresses this twin imperative and delivers to our clients the best technology and business expertise in today's digital world.

Vertical Industries Serviced

- Banking & Financial Services
- Insurance
- Public Sector / Government
- Technology & Software
- Telecommunication
- Travel Agencies
- E-Commerce and Retail
- Media
- Health care Sector
- Oil and Gas

GBS And/Or CX Services

- Customer Engagement
- Debt Collections
- Upskilling and cross selling
- Contact Centre Outsourcing
- Data Processing

Customer Service Channels

- Voice
- SMS
- Email
- Web Chat
- Chat (including WhatsApp)
- Website
- Social Media
- Instant Messaging
- Inbound/Outbound Campaign Diallers
- Smart Self Service

- Infrastructure as a service
- IVR
- Predictive Routing / Dialling
- Chat Bots
- Cloud Technology
- Platform as a service
- Software as a service
- Data processing as a service



Outsource Global



Africa's Premier Outsourcing Growth

Partner

We deploy the best-in-class technology to meet the unique needs of each of our clients. Our solutions are at the cutting edge of contact centre business & knowledge process outsourcing.

Connect With Us







GBS And/Or CX Services

Information Technology

Vertical Industries Serviced

- Social Advocacy
- Telecom
- Healthcare
- Legal
- SMEs
- Government
- Financial Services

- Contact Centre
- Remote B2B and B2C Sales
- Financial Services
- Administration
- Back Office Processing
- Remote Healthcare
- Workforce Management
- IT support and Software Development
- Professional Services
- Legal Services
- Artificial Intelligence
- Human Resource Management
- Secretarial Services

We are Africa's leading business and knowledge process outsourcing company, serving clients in the US, UK and Japan. We are an ISO certified contact centre, and the first Nigerian international contact centre. We provide first-class contact centre services and currently operate from our ultramodern facilities in Abuja, Kaduna and Lagos. Our services are tailored to perfectly suit our clients' needs and preferences, with a focus on service quality, low-cost and scalable solutions.

We help our clients become operationally efficient and competitive. We have created over 1000 direct graduate jobs for customer care executives, sales, marketing, tech, legal & financial practitioners and medical professionals serving the global market. Outsource Global and its affiliated companies seek to positively impact the world of business, by fostering exponential growth. We are big on empowering women, helping them to develop the skills, knowledge and financial status necessary, to elevate their standard of living. We also focus on recruiting economically and physically challenged individuals, bringing them into a competitive, career-focused workforce.

Customer Service Channels

Number of Locations in Country:

Total Seats/Agents/Knowledge Workers

Major Points of Presence

Global Markets Serviced

Organization Bio

Operating Years

- Voice
- Email
- Web Chat
- Video Chat
- Website
- Social Media
- Instant Messaging
- Mobile Smartphone Self Service
- Outbound Campaign Diallers

Automation And Technology

- IVR
- Predictive Routing

Mabushi, Abuja

US, UK, Japan and Africa

5 - 6

1 000+

- Chat Bots
- **Multichannel Communications**
- **Biometrics**
- Business-process-As-A-Service
- Cloud Technology
- CRM
- Artificial Intelligence
- Performance Management Tools









Outworx SA



Number of Locations in Country:	3
Major Points of Presence	Durban
Operating Years	8-9
Total Seats/Agents/Knowledge Workers	1 001 – 1 500
Global Markets Serviced	US, UK, Europe and Australia

Organization Bio

Outworx provides an innovative, professional solution for Business Process Outsourcing. Business Process Outsourcing or BPO is the outsourcing of specialised business services to assist your business's productivity and increase sales through specialised management systems. Outworx ensures that service solutions are specifically tailored to each of our clients' individual needs.

We are an international BPO provider with formidable accreditations and deep expertise in international regulatory environments. Investments in infrastructure and resources of the highest standards continue our phenomenal growth.

It is our constant mission to develop a global reputation for service excellence, professionalism and reliability. We tailor-fit operations to meet any client campaign or business process requirement. We create beneficial, honest partnerships with bespoke solutions and genuine outcomes. Detailed analytics inform our relationship as we design a customer experience and omnichannel approach that will delight, engage, reduce cost and build revenue.

Vertical Industries Serviced

- Telecoms and Mobile
- Media and Broadband
- Retail
- Financial Services
- Insurance
- Utilities
- Medical

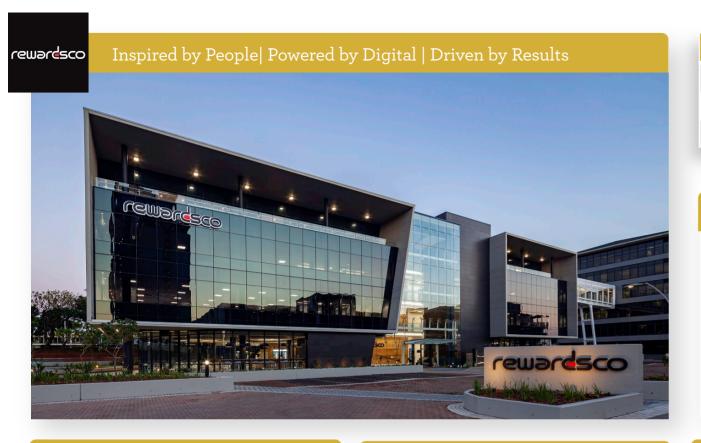
GBS And/Or CX Services

- Inbound Customer Services
- Inbound and Outbound Sales

Customer Service Channels

- Voice / IVR
- Chat
- Email
- Social Media

- IVR
- Omnichannel Communications
- Outbound Campaign Diallers
- Performance Management Tools



Number of Locations in Country:	1
Major Points of Presence	Durban
Operating Years	25+
Total Seats/Agents/Knowledge Workers	1700+

Organization Bio

For over 25 years, Rewardsco has harnessed the transformational power of digital technology, infrastructure, talent acquisition and operational efficiency to maximize growth and drive lifetime value, affinity and retention while delivering exceptional customer experiences on behalf of our clients. As a member of the BPESA with high-touch CX experts and advanced technical platforms at their disposal, Rewardsco is ideally positioned to service both local and global BPO clientele.

Rewardsco's world-class 8300 square metre facility is situated on Durban's Umhlanga Ridge with a sales force of over 1700 highly trained consultants who move approximately 100 000 products to the value of over R1 billion per month on behalf of our blue-chip clients. This portfolio of clients includes the three largest mobile network operators in South Africa – MTN, Vodacom and Telkom.

Vertical Industries

- Financial Services
- Telecommunications
- Insurance
- Motor
- Healthcare
- Retail & E-Commerce
- Logistics

GBS And/Or CX Services

- Outbound Services
- Product Sales
- Lead Generation
- Consumer Surveys
- Outbound Services
- Product Sales
- Lead Generation
- Consumer Surveys
- Logistics
- Warehousing
- Fulfilment
- End-To-End Process Management & Reporting

Customer Service Channels

- Voice
- Email
- SMS
- Social Media
- Fax
- Website
- Web chat

- Call Centre Solutions
- Digital Technologies
- CRM
- Business Intelligence
- Data Science
- Interactive Voice Response



SA Commercial



1	
Cape Town	
16+	
250+	
UK, USA, Europe, Australia, Canada, New Zealand	

Organization Bio

SA Commercial is an outsourced service provider who specialise in providing your business with Client Contact Solutions and Business Process Outsourcing (BPO) that is perfectly suited to your individual needs. We understand that every business is unique and comes with its own specific needs. As such, the one-size-fits-all approach rarely applies in the real world. SA Commercial is a trusted and flexible partner that can understand and adapt to the exact nature of your business.

SA Commercial is BEE Level 1 compliant and one of a select few South African companies to hold ISO 9001 and 27001 accreditations.

We have built a wide range of contact centre and back-office services that allows you to focus on your core business competence, while we take care of Client Contact Solutions and Business Process. By focusing on your short and long-term needs, we implement the best practices that will allow your business to foster growth, increase revenue and ensure stronger brand awareness.

Vertical Industries Serviced

- Retail
- Public Sector
- Healthcare
- Insurance
- Energy
- Banking & Financial Services

GBS And/Or CX Services

- Customer Services
- Research Services
- Back Office Support
- Sales (Lead Generation)
- Technical Support Services
- Shared Services

Customer Service Channels

- Voice
- Email
- SMS
- Social Media
- Website

- Omnichannel
- Interactive Voice Response
- Call Centre Solutions



Sigma Connected



Number of Locations in Country:	7
Major Points of Presence	Cape Town, Johannesburg, Pretoria
Operating Years	11
Total Seats/Agents/Knowledge Workers	1 500 +
Global Markets Serviced	UK, Australia, USA

Organization Bio

Sigma Connected is a multi-award-winning provider of outsourced contact centre services, business process outsourcing, training and consultancy services. Our areas of expertise include customer acquisition, collections, complaints handling, customer services, and vulnerable customer support services.

Now with over 4000 employees, Sigma provides outsourced services to clients across all sectors, including utilities, finance, telecoms, retail and government. Our focus is delivering the best customer experience possible so that our clients achieve their desired outcomes. We do this by training our teams to a high standard, using data and insight to analyse performance and trends, strict quality assurance measures and by adopting a test, learn and refine methodology on new operating models and techniques.

Vertical Industries Serviced

- Energy
- Telecoms
- Water
- Banking
- Credit Services
- Insurance
- Retail

GBS And/Or CX Services

- Inbound and outbound services
- Voice and non-voice services
- Customer acquisition
- Customer onboarding
- Customer services & complaint management
- Early arrears collections
- Vulnerable customer identification and management
- Back-office services
- Contact Centre Staff Training
- Hybrid working models

Customer Service Channels

- Voice
- Email
- Website
- Web chat
- Social Media
- SMS

- IVR
- Advanced Call Routing
- Apps
- Omni-channel solutions
- Remote access
- Workforce Force Management
- Performance Management
- Analytics and insight
- Speech Analytics



SoluGrowth



Number of Locations in Country:	4
Major Points of Presence	Pretoria, Johannesburg, Durban & Cape Town
Operating Years	4+
Total Seats/Knowledge Workers	280+
Global Markets Serviced	USA, UK, Europe, AUS, Egypt

Organization Bio

SoluGrowth is a South African Process Solutions company serving clients across the globe providing services in the Knowledge Process Outsourcing (KPO), Business Process Outsourcing (BPO) and Managed Solutions areas. The company was created after the owners identified an opportunity to carve the business out from one of the leading global professional services firms.

This was with the focus of creating a more future focused business, providing flexible solutions to clients and flexible working practices to staff. This is well complemented by a highly qualified and experienced team positioned to provide a centre of excellence for local and multinational entities looking at growing on the African Continent.

We offer world-class solutions focused on enabling our clients to achieve growth and cost efficiencies on a range of highly complex business processes.. For more information about us visit: www.solugrowth.co.za

Vertical Industries Serviced

- Banking & Financial Services
- Automotive
- Education
- Public Sector/Government
- Mining & Resources
- Media & Publishing
- Insurance
- Healthcare & Medical
- FMCG
- Telecommunications
- Technology & Software
- Utilities & Energy

GBS And/Or CX Services

- Business Process Outsourcing (BPO)
- Finance and Accounting
- Payroll Services
- Supply Chain
- Digital Technology
- IT Outsourcing
- Knowledge Process Outsourcing
- Technology Industry Digital Solutions (TIDS)

Customer Service Channels

- Email
- Instant Messaging
- Video Chat
- Social Media
- Website

- Business-process-as-a-Service
- Cloud Technology
- Data Protection Applications
- Employee Collaboration Tools
- Mobile Applications
- Quality Assurance Tools
- Robotic Process Automation (RPA)



Webhelp

We design, deliver and optimize unforgettable human experiences for today's digital world

Creating game-changing customer journeys for the leaders of today and the unicorns of tomorrow.

Discover What We Do



Number of Locations:	250+
Major Points of Presence Globally	Europe, the Middle East, Africa, South East Asia, North America and South America
Major Points of Presence Africa	Morocco, South Africa, Madagascar, Ivory Coast, Algeria, Egypt, Senegal, Benin
Operating Years	22
Total Seats/Agents/Knowledge Workers	100,000+ Global 21,349 Africa
Global Markets Served	Europe, Middle East, Africa, North America, South America, APAC

Organization Bio

Webhelp designs, delivers, and optimizes unforgettable human experiences for today's digital world – creating game-changing customer journeys. From sales to service, content moderation to credit management, Webhelp is an end-to-end partner across all B2C and B2B customer journeys. Its close to 100,000 passionate employees across more than 55 countries thrive on making a difference for the world's most exciting brands. Webhelp is currently owned by its management and Groupe Bruxelles Lambert (Euronext: GBLB), a leading global investment holding, as of November 2019.

Vertical Industries Served

- Automotive & Mobility
- Fashion and Luxury
- Financial Services
- Healthcare
- Hightech & Media
- Retail & E-Commerce
- Utilities & Public Services
- Telecommunications
- Travel & Leisure

GBS And/Or CX Services

Customer Engagement:

- Sales
- Technical Support
- Commercial Assistance

Customer Experience:

- Consulting Services
- Technology Services
- Analytics & Managed Services

Business Process Outsourcing:

- Legal Services
- Digital Services
- Payment Services

Specialist Outsourcing:

- Enterprise Services
- Healthcare Services

Customer Service Channels

- Voice
- Email
- Live chat
- Auto-chat
- Forum, community and Social media moderation

Automation And Technologies

Contact Centre services:

- Omnichannel / multichannel
- Business Messaging
- CRM integration
- Infrastructure services

Automation & Al services:

- Virtual assistant
- Robotic Process Automation
- Speech Analysis
- Voice bot
- Machine Translation

Digital Technology services:

- Consulting services: Digital strategy, UX/UI design, solution architecture
- Web & Mobile app development front/back end
- Customer software development
- Application maintenance



Xceed Egypt



Number of Locations in Country:	10	
Major Points of Presence	Egypt – Morocco – Mauritius	
Operating Years	20	
Total Seats/Agents/Knowledge Workers	25 000+	
Global Markets Serviced	North America, Europe, Middle East & Africa	

Organization Bio

Xceed is a global provider of quality, multi-lingual Business Process Outsourcing (BPO) services. Since its inauguration in 2001, Xceed has been at the forefront of the country's BPO sector by offering innovative world class outsourcing services, as a competitive alternative, guaranteed to cut costs and improve quality. Xceed innovative solutions are based on evaluating clients existing business models and enhancing them to achieve the goals of realizing client satisfaction and long-term profitability.

Reaching more than 25,000 employees. Xceed now is one of the leading multilingual Business Process Outsourcing (BPO) Service provider in the EMEA region with a capacity of more than 10,000 web enabled multi-channels workstations serving numerous industries across Europe, North America, Middle East & Africa. Xceed is currently present in three (3) countries, with seven (7) sites in Egypt, one (1) site in Morocco, in addition to a new site in Mauritius to comply with Xceed strategy and to complement its presence in Africa and to meet expectations for French Canadian and multinationals need of Bilingual customer base.

Vertical Industries Serviced

- Government/Public Sector
- Automotive
- Retail / eCommerce
- Travel & Tourism
- Telecommunications
- Insurance
- Food & Beverage
- Health Care
- Technology
- Real estate

GBS And/Or CX Services

- Business Process Outsourcing
- Voice & Non-voice Services
- Inbound & Outbound Services
- Back Office Services
- Recruitment Process Outsourcing
- Help Desk support Services
- Social media Analysis Services
- Finance & Accounting
- Infrastructure Management Services

Customer Service Channels

- Voice
- SMS
- Email
- Web Chat
- Video Chat
- Website
- Social Media
- Instant Messaging
- Mobile Smartphone Self Service
- Outbound Campaign Diallers

- IVR
- Advanced Call Routing
- Apps
- Chat Bots
- Omni-Channel Solutions
- Remote Access
- Robotics
- Artificial Intelligence
- Performance Management Tools

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To access the full, extended report, please go to: https://gbs.world/africagbsreport



WHO WE ARE

Advisory

G:ENESIS GLOBAL BUSINESS SERVICES

Research

G:ENESIS | GLOBAL BUSINESS SERVICES

Marketplace



Genesis Global Business Services In partnership with The World Source Marketplace for Global Business Services (GBS.World)

We empower and enable global Knowledge Leaders. We co-create and publish business, trade and investment research, market intelligence and insights for executives of today's Experience Economy.

Backed by incisive research, profiling surveys and location assessments we connect buyers and service providers to grow exponentially and transform human experience (HX) every.









Value proposition development





