



ABOUT US

A global economic and development consultancy

Genesis Analytics is a global economic and development consultancy focused on African markets. From our offices in South Africa, Kenya, Nigeria and Côte d'Ivoire, and our representation in Botswana, Ethiopia, Uganda, Zimbabwe, India, Canada, the United Kingdom and the United States, Genesis has completed work in 95 countries globally.



THE CENTRE OF DIGITAL EXCELLENCE (CALLED CODE) AT GENESIS

co-creates value with our clients by harnessing opportunities in the digital economy. We specialise in identifying and enabling digital work opportunities through the BPO and IT/digital outsourcing industry.



THE GLOBAL BUSINESS SERVICES BRANCH OF GENESIS (CALLED GENESIS GBS)

is at the forefront of analysing and quantifying BPO and IT/digital outsourcing market trends, developments and best practice.



THE WORLD SOURCE MARKETPLACE FOR GLOBAL BUSINESS SERVICES (CALLED GBS.WORLD)

helps global business buyers discover sourcing opportunities, verify, shortlist and right-source service providers and best-fit nearshore/offshore locations



**GENESIS HAS WORKED IN
95 COUNTRIES GLOBALLY**

ABOUT US



OUR NETWORKED TEAM OF RESEARCHERS AND ANALYSTS ARE EXPERTS IN:



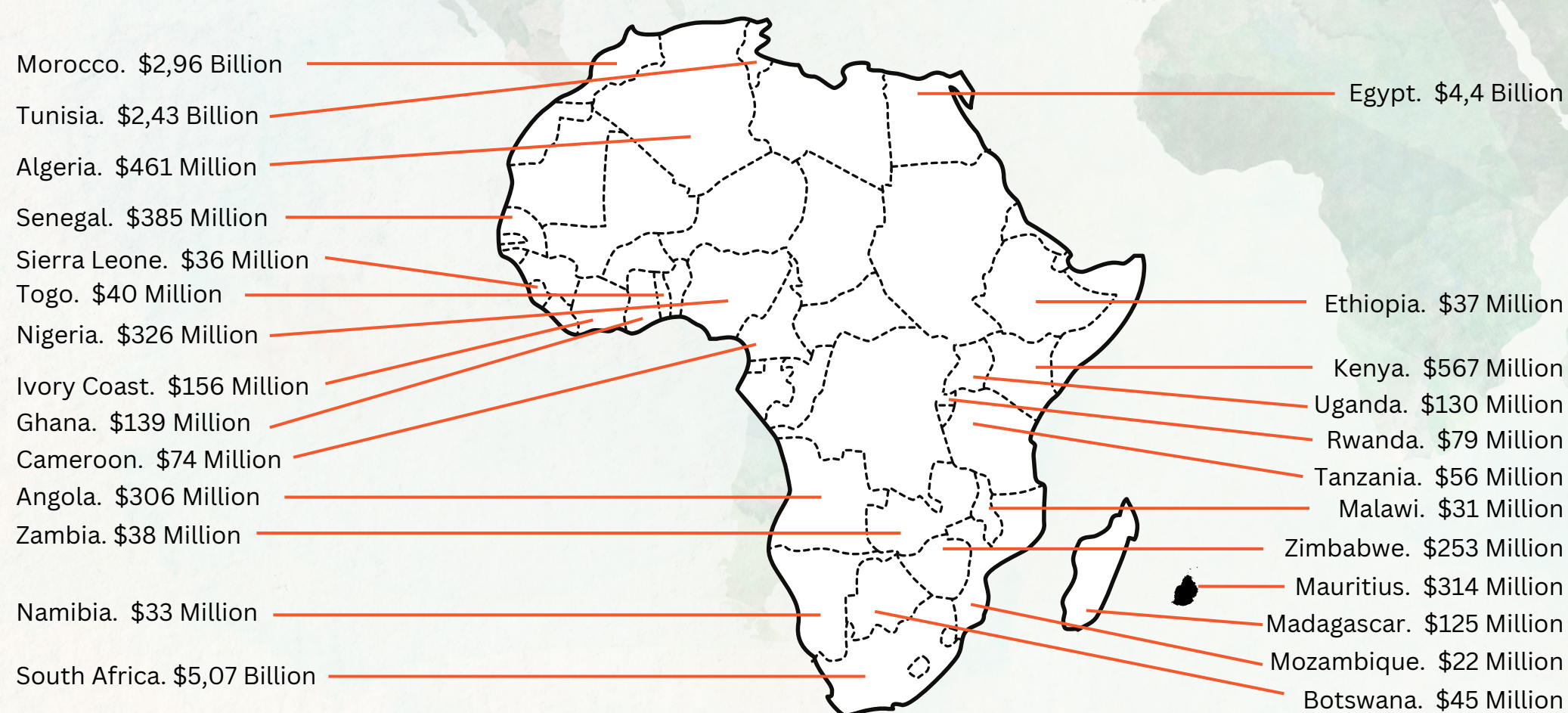
ABOUT US



AFRICA IS THE NEXT FRONTIER

FOR OFFSHORE BPO AND IT/DIGITAL OUTSOURCING DELIVERY

Business buyers and investors around the world are looking for new offshore delivery locations that offer compelling cost advantages while delivering quality customer experience, back-office, IT/digital and other services enabled by digital technology. While countries like India and the Philippines have dominated this space traditionally - with massive gains in employment, export revenue and FDI – African markets have growing potential to become the next frontier for BPO and IT/digital outsourcing delivery.



Africa's global business services offshoring market is already estimated to be US\$8.3 billion in size – and this is projected to grow to US\$11.7 billion by 2023. But this represents a very small share of the global outsourcing demand. The opportunity, and challenge, for African markets is to win an increasing share of this global demand by attracting international investment and establishing the industry requirements for world-class offshore service delivery.

Genesis believes that this opportunity is a game-changer for Africa's youth employment creation and economic development. We help governments, industry associations, private firms and development organisations to prepare for and realise this opportunity.

ABOUT US







Our Market Diagnostics provide relevant, incisive data and knowledge for governments, industry associations and service providers. We work with our clients to determine what **specific questions and challenges they need to diagnose and then design GBS demand-to-supply side analysis to answer these questions.** Our networked team of researchers and analysts are able to collect, analyse and tap into **credible industry data and accurate market intelligence tailored** to help attract demand and meet supply.

MARKET DIAGNOSTICS

Our products and services:



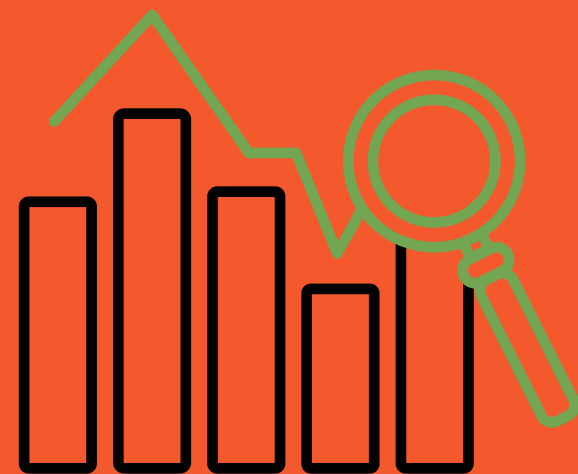
-  GBS sector readiness diagnostics
-  Supply-side market quantification
-  Buy-side market mapping and analysis
-  Consumer and customer surveys
-  Labour and opex surveys



MARKET DIAGNOSTICS

WHAT CHALLENGE ARE WE SOLVING?

Access to little (or too much) data, unreliable information, or framing the right/pertinent questions about GBS sector readiness, demand-side requirements and supply-side capabilities.



WE UNLOCK DISTINCTIVE VALUE WITH GLOBAL DEMAND-TO-SUPPLY-SIDE RESEARCH AND BENCHMARKING INDICES

Our market diagnostics are not just about data, its about 25 years of GBS and Africa-to-global market research experience and deep domain knowledge. We have access to credible, incisive and leading-edge GBS insights from our bank of commissioned and syndicated reports, surveys and studies and a global team of researchers and analysts. This is based on:

- **Forward-looking, strategically-relevant insights** for/from GBS buyers, providers and locations.
- These insights are drawn from quantitative data and qualitative **insights that measure overall sector readiness.**
- This enables us to answer pertinent questions, **prioritise top focus areas and make impactful analysis-based decisions.**



HOW WE HAVE UNLOCKED VALUE WITH MARKET DIAGNOSTICS



GENESYS

Genesys commissioned Genesis GBS to publish a series of research reports on Africa between 2018 and 2021. This included the 2018 **Cloud Transformation** in African Small and Medium-Sized Contact Centres, the 2019 **Blended AI Report** for South-East Africa and the 2021 Genesys Contact Centre Special Report.



ACCENTURE

Accenture commissioned Genesis GBS to profile, analyse and evaluate **Content Moderation Services and Market Trends**. The report provided data and insights on organisations that have these skills and capabilities as well as the markets and vertical industries they service.

It included a review of **labour costs** between different locations/hubs, **skills differences** (for content moderation), and **facility cost differences** in various cities. The research included an analysis of the addressable and available talent pools in content moderation and current and **prospective brands and enterprises outsourcing their content moderation** functions.



HARAMBEE

Harambee needed to understand what is required to **make sure that there are enough entry-level people/talent/skills** who are affordable enough for South African organisations that are digitising right now while also catering for net new jobs required in the GBS sector. Genesis GBS was commissioned to produce The **Harambee Mapping Digital and ICT Roles and Demand** for South Africa report that served to provide actionable insights for this process by Interviewing digital and technology channel operators and end-users/corporates in South Africa. A mapping tool, PDF report and interactive microsite were developed to present the results of the survey.



HOW WE HAVE UNLOCKED VALUE WITH MARKET DIAGNOSTICS

Business Process Enabling South Africa appointed Genesis GBS to produce the 2021/22 South Africa Global Business Services (GBS) National Quantification & Investment Report. The fieldwork included over **228 quantitative interviews/surveys with global business service operators and service providers** across South Africa and an additional **48 qualitative interviews with key government, industry and labour stakeholders**, industry experts and analysts. The research study profiles, validates, and quantifies the GBS sector in the country and facilitated the creation of a **GBS Investor Handbook** for South Africa.

Genesis GBS facilitated the production of the **2023 Africa GBS Benchmarking & Market Report**. It includes insights into the size and nature of the **GBS markets of 26 African countries**. The report benchmarks global demand across key vertical sectors/industries with the available supply of expertise, skills, capabilities and talent on the African continent that can provide business process services. In addition it includes data points on b2 English addressable talent pools, ramp-up speeds and fully loaded opex costs. Country score cards and rankings for customer lifecycle management, digital and IT outsourcing, data management, back-office processing and customer administration are also included in the report.

In 2019 and 2020, Genesis was commissioned to produce the 2019 **Europe BPO Marketplace Report** and 2020 **United States BPO Marketplace Report**. Each report provided a market analysis and profile of business process outsourcing (BPO) service providers in each location and in key nearshore markets. This was a closed, commissioned report that included insights on:

- Sales performance
- Business process services
- Customer care programs
- Resource and talent pools
 - Talent development
- Digital channel fulfilment
- Compliance and regulation
- Industry and sector analysis
 - Pricing analysis
 - Operating cost analysis




Our Opportunity Identification enables governments, industry associations and suppliers to analyse, identify and unlock opportunities in global business services (GBS). We work with our clients to identify their objectives (e.g. job creation, attracting global investors and FDI) and scope the available opportunities which can meet these objectives using our Market Diagnostics toolkit.



OPPORTUNITY IDENTIFICATION

Our products and services:

-  Value proposition design
-  Competitor and performance benchmarking
-  Buyer-to-supplier benchmarking
-  Offshore and nearshore location analysis
-  Source market penetration analysis
-  Impact sourcing & job creation opportunities



OPPORTUNITY IDENTIFICATION

WHAT CHALLENGE ARE WE SOLVING?

Inability to identify and harvest the right and relevant GBS opportunities and/or position or matchmake a country with best-fit global source markets and buyers.



WE IDENTIFY DISTINCTIVE AND BEST-FIT OPPORTUNITIES IN THE GBS MARKETPLACE LEVERAGING BENCHMARKING AND POSITIONING

Opportunity identification is first enabled by our market diagnostics and augmented by benchmarking, gap analyses and positioning enabling us to understand what, who, why and how to target in global source markets, nearshore and offshore locations and vertical industries. This is based on:

- Our ability to **compare, analyse and benchmark** GBS locations and services **from scores, rankings and demand-side insights** from our GBS indices and surveys.
- Access to global GBS **buyers, service providers, consumers, market makers and analysts** in our GBS World marketplace and research-centric communities and mindshare groups **enabling us to measure their perceptions, priorities and what really matters to them.**
- Proven best **practice for market positioning**, awareness and value propositioning.



HOW WE HAVE UNLOCKED VALUE WITH

OPPORTUNITY IDENTIFICATION



TRANSCOM

Transcom appointed Genesis GBS to conduct a competitor analysis and benchmarking study of the Caribbean BPO market.

This included a **comparator analysis with competitor profiles** along with an analysis of the addressable market, including **labour, opex and pricing benchmarking**.



TELEPERFORMANCE

Teleperformance needed to **understand the competitive landscape** in Africa and **the major GBS/BPO competitors across 8 countries**. This included country profiling studies, SWOT analyses and benchmarking of over 120 competitors across the chosen countries. The analysis Teleperformance to clearly understand opportunities in each market.



REWARDSCO

Rewardsco contracted Genesis GBS to analyse competitors in the Australia, UK and US markets after we conducted the market penetration and engagement strategy. We identified both onshore and offshore competitors and **conducted a full profiling analysis of their size, capabilities and skills** as well as a benchmarked **pricing analysis**.



HOW WE HAVE UNLOCKED VALUE WITH OPPORTUNITY IDENTIFICATION

Genesis GBS was commissioned by BPESA to produce market intelligence reports and value propositions for the business process services (BPS) sector (also known as shared services). The research project included **4 market intelligence reports and sub-sector value propositions** that substantiated global demand and investment priorities and **benchmarked and validated** these findings against **available supply, services, capabilities** and expertise in South Africa. The value propositions are being utilised, among other things, for **inward and outward missions**, and to assist in **economic development, job creation and investment**. They include:

- Alternative Legal Services (ALS)
- Finance and Accounting (F&A)
 - Procurement Services
- Human Resource Management

The **2022 South Africa National GBS & Source Market Value Propositions** were completed by Genesis GBS in close consultation with BPESA, Invest SA and the Department of Trade, Industry and Competition (the dtic). The value propositions include fresh statistics and information about the dynamic, multi-faceted and diverse nature and structure of the GBS sector in South Africa. The **customised source market value propositions** are based on demand mapping interviews that provided a clear understanding of what buyers/investors, and their chosen outsourcers, are looking for in **the United Kingdom and the United States**.

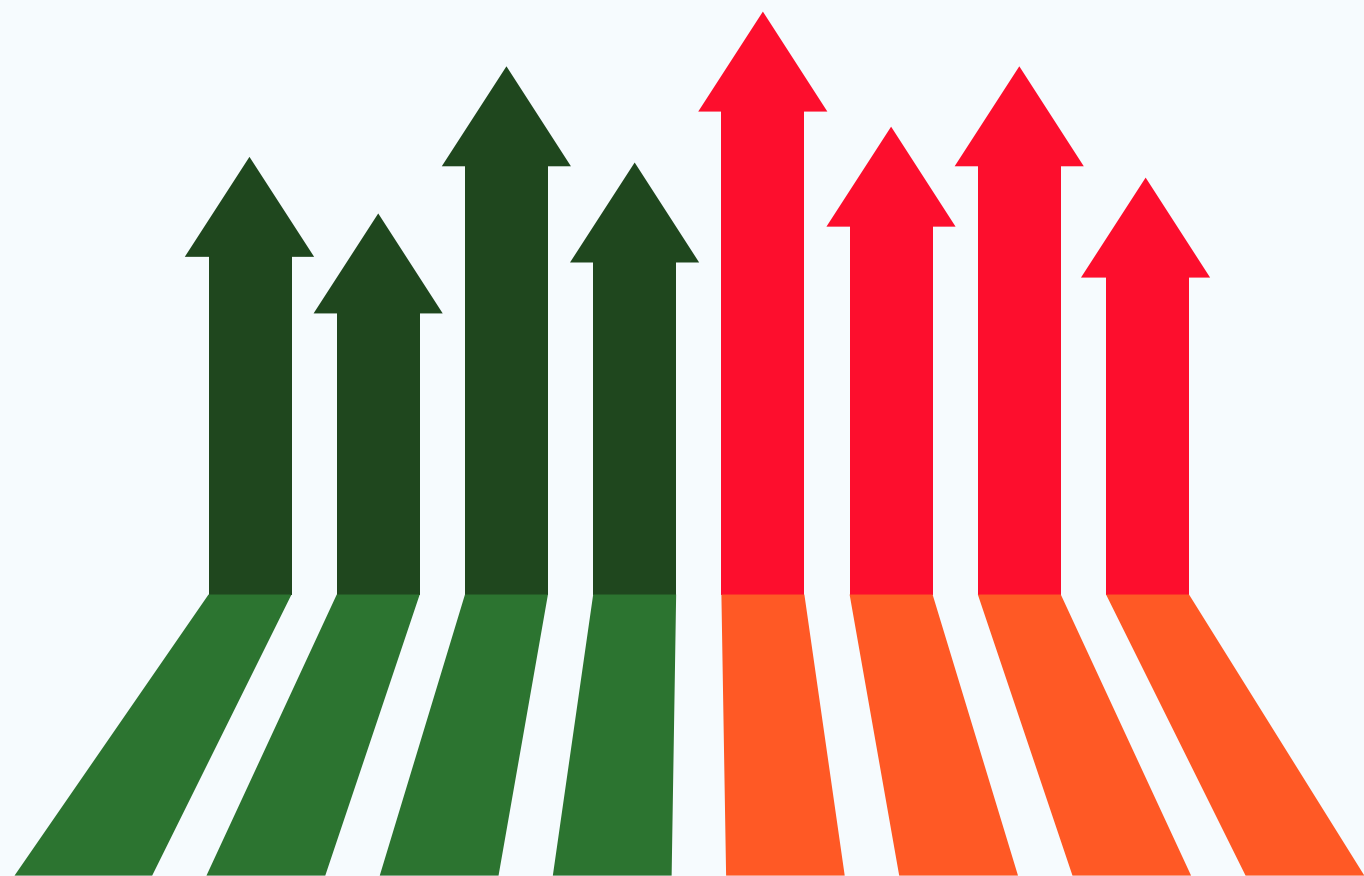
Genesis convened the South Africa in the Digital Age (SADA) initiative in 2019 with its partners Oxford University and GIBS Business School. SADA was dedicated to identifying a range of scalable income-generating opportunities through the digital economy to address the country's youth employment crisis. Genesis identified **globally traded services – including customer experience, digital and IT tasks, financing, accounting and legal support, and a range of social services delivered online – as the largest job-creation opportunity** for South Africa. The initiative mapped out how the country could achieve an additional 500,000 jobs over 10 years and developed a strategy for achieving this growth that was adopted by the global business services industry association and South African government.



We work with our clients to identify their winning objectives and the boldest route to achieving these. Strategies are about making difficult choices on what opportunities to pursue and what to prioritise given scarce resources and implementation capacity. Rather than taking a cookie-cutter approach to strategy formulation, we fashion bespoke strategies based on our clients' needs and their context.

GROWTH STRATEGIES

Our products and services:



-  Go-to-market strategies (vertical and source market) for operators
-  Sector growth plans
-  Incentive and policy design
-  Job creation strategies
-  Skills development strategies
-  Feasibility and business/investment case development



GROWTH STRATEGIES

WHAT CHALLENGE ARE WE SOLVING?

Growth requires intentionality in picking areas to play and determining how to succeed. Growth strategies typically fail if the wrong priorities are picked and when the key stakeholders required for success are not convened.



WE UNLOCK DISTINCTIVE STRATEGIES BY LEVERAGING OUR DEEP IN-COUNTRY AND GLOBAL NETWORKS

Impactful strategies are co-created, vetted and bought in to by the complex mix of stakeholders with a bearing on their success. **We leverage our extensive stakeholder network in all our strategy work** to ensure that the opportunities we identify and the action plans we develop are credible, implementable and valid. For example:

- We base delivery location expansion strategies for operators on insights from our **network of in-country consultants and partners** to conduct credible due diligence.
- Our go-to-market strategies are based on inputs from our **network of global buyers, operators and analysts** to understand how investors make outsourcing decisions.
- We leverage our **local and international networks across the public, private and development sectors** to convene and build consensus on a common vision and action plan for national GBS sector development.



HOW WE HAVE UNLOCKED VALUE WITH GROWTH STRATEGIES



Genesis GBS helped goBeyond **with a market analysis and penetration strategy** for the **United States** BPO insurance market.

We identified and analysed opportunities in the delivery of insurance BPO services including first notice of loss (FNOL) services, claims processing, and policy renewals.



Genesis GBS helped Rewardsco **with a market penetration and engagement strategy** for Australia, United Kingdom and the United States.

We used our market penetration methodology to **create a GTM Action Plan for these go-to-markets** based on buy-side demand for Rewardsco services in specific vertical industries.



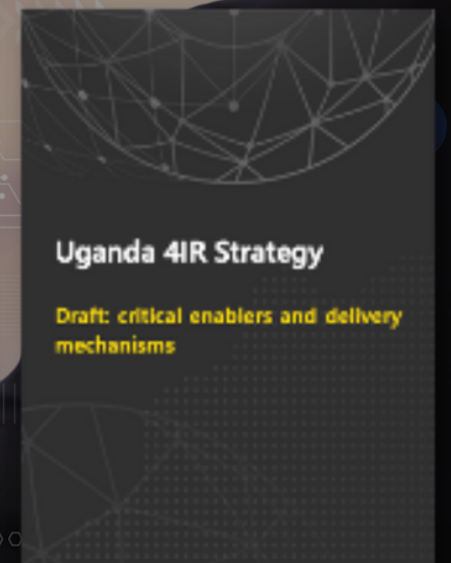
Genesis assisted **Webhelp** with a BPO market analysis and growth strategy for **Europe, including Belgium, France, Germany, and the Netherlands.**

This included an in-depth market analysis of **buyer demand, trends and opportunities** and a **positioning strategy** to develop awareness among analysts and potential partners/consultants that directly impact buyer decisions.

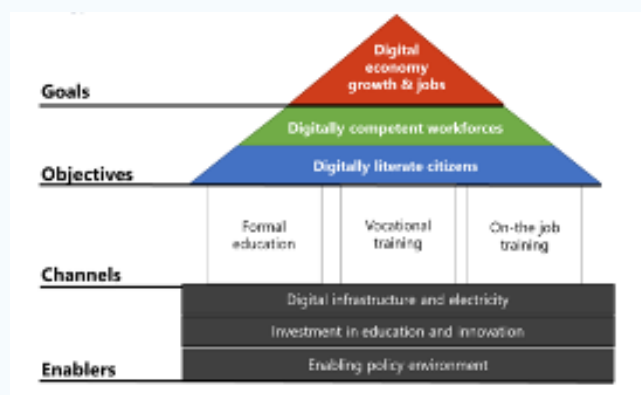




HOW WE HAVE UNLOCKED VALUE WITH GROWTH STRATEGIES



Genesis Analytics supported its partners Oxford University and the SMERU Research Institute to formulate a **national digital skills strategy for Indonesia**. The Genesis team combined its expertise in problem-solving in the digital economy with SMERU's local market knowledge to identify the key blockages to mass digital skilling in Indonesia and to identify concrete actions to address these blockages. The strategy provides a detailed roadmap to accelerate digital skills development through three channels: formal education, vocational training and on-the-job training. The strategy provides the government of Indonesia's Ministry of Communications and Informatics with clarity on the channels and enablers that must be in place for the country to **elevate the digital skills of its population and realise its job creation objectives through the digital economy**.



The Department of Trade, Industry and Competition (the dtic) partnered with Genesis to formulate **a growth plan to secure an additional 500,000 export-facing jobs** in the GBS sector. The Masterplan covers three core areas: increasing the sector's ability to **capture global demand through marketing, investment facilitation** and incentives; **scaling the sector's ability to deliver** through supplying skills, broadband infrastructure and physical infrastructure; and achieving sustainability and **transformation within the sector** through improved black ownership, managerial talent and small business opportunities within the industry's supply chain.



Genesis conducted a comprehensive scoping of **4IR opportunities in Uganda** to identify the areas of 4IR application that hold the greatest potential to deliver the country's Vision 2040 of becoming a middle-income country. The identified opportunities are improving the productivity of agriculture, **transforming human capital development**, closing the shortfall in economic opportunity, and managing urbanization and governance. Next Genesis conducted a 4IR readiness assessment which diagnosed the state of **4IR ecosystem development in five areas** critical for these opportunities: 4IR connectivity, agile governance, upskilled population, eGovernment, and resource mobilization.

Lastly, Genesis worked with the Taskforce to obtain input from a broad cross-section of the 4IR ecosystem in Uganda to **formulate a national 4IR strategy**. The strategy identifies the **critical enablers and delivery mechanisms** required for Uganda to realize the identified 4IR opportunities and provides a monitoring and evaluation framework to implementing the strategy.



We work with our industry association, government and donor clients to support the smart implementation of sector growth and inclusive development plans. Successful implementation requires a well coordinated ecosystem across the public, private and development sectors. We leverage our networks and experience to support the coordination of these players and build the capacity of the implementers.

IMPLEMENTATION SUPPORT

Our products and services:



Identifying funding sources for implementation



Industry association formation and operating model design



Building capacity of industry associations and government agencies



Upgrading capacity of local operators for export market



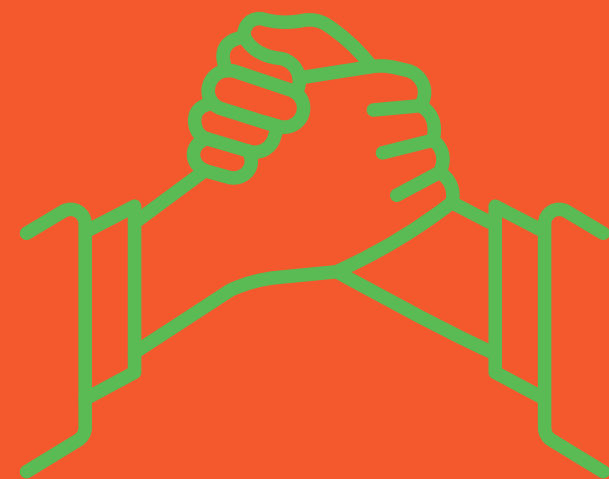
Matchmaking buyers and global operators with delivery locations



IMPLEMENTATION SUPPORT

WHAT CHALLENGE ARE WE SOLVING?

Implementation of GBS development plans are thwarted by a lack of funding for implementation, poor coordination among the players required to implement interventions, and a lack of local implementation capacity.



OUR APPROACH TO IMPLEMENTATION SUPPORT IS DISTINCTIVE BY FOCUSING ON ADAPTIVE IMPLEMENTATION THROUGH LOCAL CAPACITY

Our philosophy on implementation support is different to the traditional development sector approach. This approach typically involves a mix of local and international capabilities combined for a few years until funding dries up which is not sustainable. Our approach is to build a sustainable local implementation ecosystem:

- This requires **identifying a local institution** with credibility in the market to play the key coordinating, convening and implementation role, such as an industry association or government agency (e.g. an export promotion agency or economic development agency), or both
- The identified implementers need to have **adequate capacity among permanent staff** in the organisations so as not to be reliant on foreign short-term contractors
- Implementation needs to be **adaptive to changing conditions** as new opportunities emerge and implementation priorities shift



HOW WE HAVE UNLOCKED VALUE WITH IMPLEMENTATION SUPPORT

Genesis Analytics was appointed as **technical advisors to the Jobs Fund**. The South African National Treasury launched the Jobs Fund in response to South Africa's persistently high unemployment rate. The Jobs Fund is a competitive grant fund based on challenge fund principles. It aims to discover innovative models that prioritise systemic solutions and sustainable creation of new permanent jobs. In this role, **Genesis provided support to the Jobs Fund investment strategy, governance, monitoring and evaluation (M&E) and general operations**. This included defining the fund's operations and monitoring frameworks, supporting grantee monitoring, providing quality assurance capacity building, and advising grantees on project-level activities.



Genesis Analytics was contracted by the Michael and Susan Dell Foundation, on behalf of the Presidency of South Africa and the Department of Higher Education and Training, to **build the capacity of the National Skills Fund to implement a pay-for-performance fund to support the creation of 4500 jobs** in high-demand roles in the BPO and digital outsourcing sector. Genesis worked with the National Skills Fund to identify intermediary organisations who could aggregate employer requirements and match them to training providers, build of a rate card and term sheet, and design how payments will be triggered.. Genesis also provided technical assistance for the launch of the mechanism and the contracting of all parties, including due diligence of all applications received. This due diligence process includes assessment of applicants' regulatory and legal compliance, implementation capacity, liquidity and potential to achieve the desired impact.



Genesis Analytics provided **technical assistance to the Presidency in South Africa to support implementation of the country's Covid-19 economic recovery programme**. Genesis rapidly convened stakeholders across the digital economy to identify implementable projects to support low-income communities to **access broadband internet services to learn online and access work opportunities, including in the BPO and digital outsourcing sector by working from home** during the pandemic. Genesis supported the design of a Mass Broadband Fund to provide subsidies to private providers of fibre networks and wireless internet services to address the current market gap in broadband provision to low-income communities in South Africa. This included securing funding from the National Treasury and working with Harambee's Digital Work Accelerator to coordinate the governance and deployment of the Fund..



CLIENTS AND PARTNERS





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