Investment opportunities in Kenya for Business Process Outsourcing (BPO)

September 2025

REPUBLIC OF KENYA

MITI
MINISTRY OF INVESTMENTS, TRADE & INDUSTRY

KenInvest
KENYA INVESTMENT AUTHORITY

Acknowledgements

Global Business Services consists of various service lines including Business Process Outsourcing

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x Focus of this document

Global Business Services (GBS) service lines

Operational Services

1. Business Process Outsourcing (BPO)
2. Managed Cloud and Infrastructure Services

Project Services

3. IT Consulting
4. Implementation

BPO sub-sectors

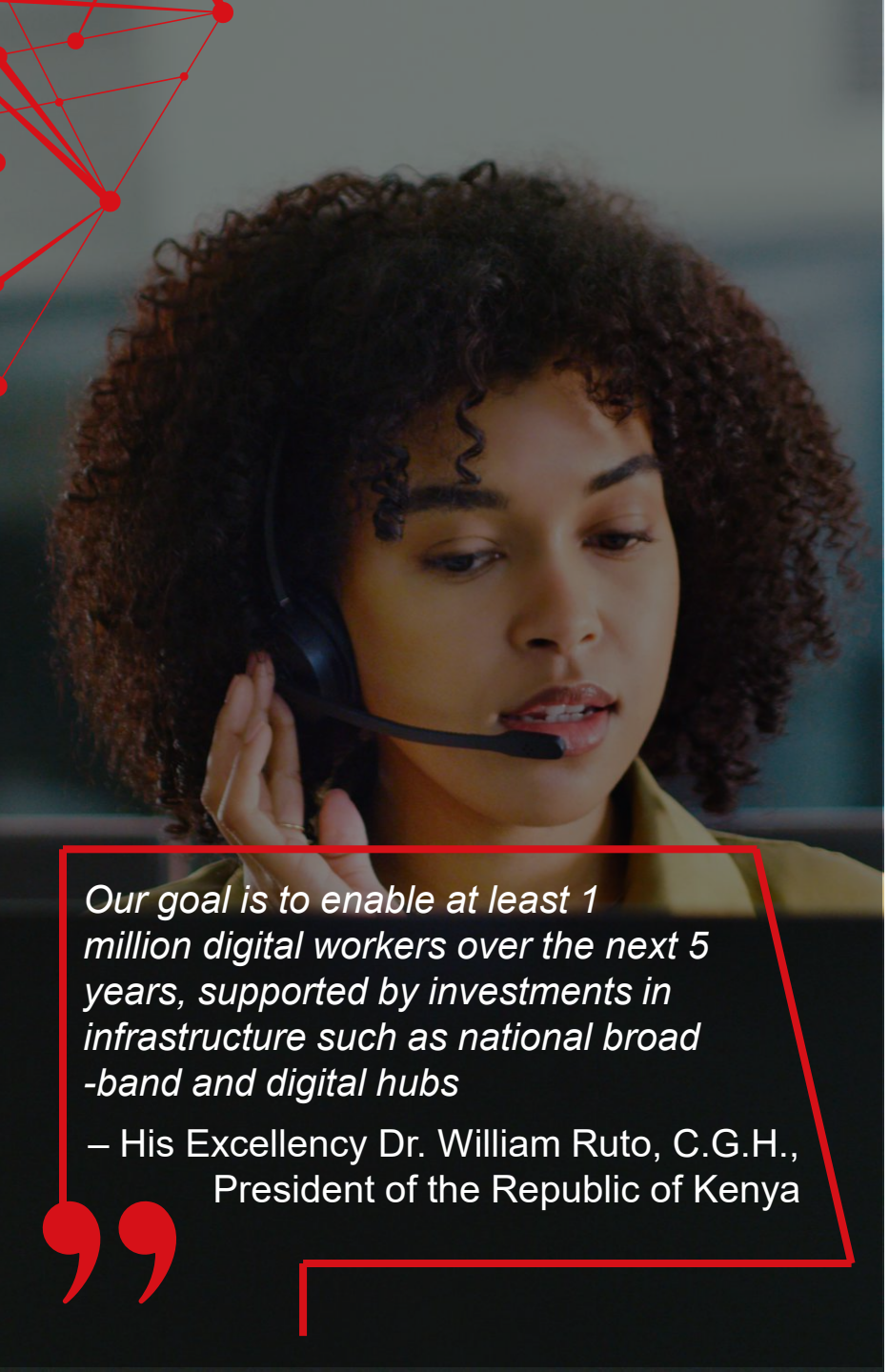
Investment opportunities in Kenya

- Information Technology-Enabled Services (ITES)
- Knowledge Process Out-sourcing (KPO)
- Front-Office BPO
- AI-Data Services

Other

- Back-Office BPO
- Industry-Specific BPO Services
- Other services

Source: Gartner, Everest



Our goal is to enable at least 1 million digital workers over the next 5 years, supported by investments in infrastructure such as national broad -band and digital hubs

– His Excellency Dr. William Ruto, C.G.H.,
President of the Republic of Kenya

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Global Business Services (GBS) market reached ~$1.3Tn in 2023

~$1.3Tn

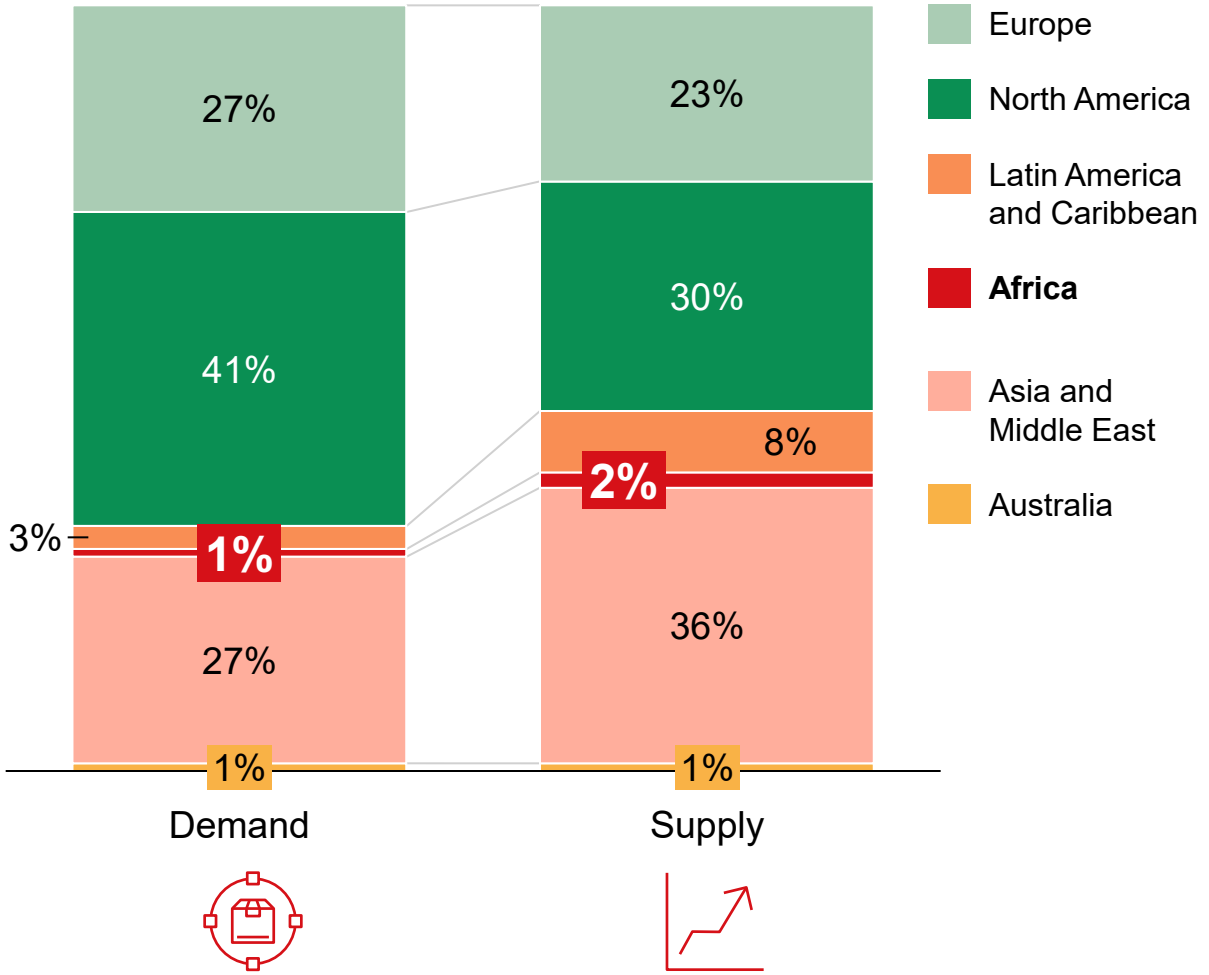
Estimated global demand for 2023

8.2%

Projected annual growth (CAGR) between 2023 and 2030

43Mn

GBS workforce in 2023[1]



1 Estimate from Genesis Analytics
Source: Genesis Analytics, Gartner IT Services Market Forecast Q1 2021

Top GBS markets have evolved offering over time, with automation and specialization set to define future of the sector

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Key market[1] and size		Key characteristics and growth drivers
India	**$254 Bn**	**Transitioned** from back-office operations to offering high-value services, with **IT-Enabled Services**, including **software and advanced IT** leading[2], driven largely by a strong **IT industry backbone** and **government support** (e.g., STPI[3])
Philippines	**$37.9 Bn**	Traditionally known for **voice-based front-office BPO**, now expanding into **specialized Knowledge Process Outsourcing** such as finance and accounting, and healthcare, driven by Its **cultural alignment with Western markets** (e.g., US)
South Africa	**$2.9 Bn**	Started as a **voice-based front-office BPO** (contact centers) hub for UK and Europe, now establishing as a hub for **multilingual customer service** and **digital back-office** functions

As the Kenyan BPO market develops, the market focus may be expanded to GBS opportunities beyond BPO

Key trends

Automation

~40% of GBS jobs vulnerable to job replacement due to AI, necessitating digital upskilling to increase resilience

New job categories arising, e.g., AI Data Services, AI management, and AI Integration and Governance

Specialized customer demands

Highly **skilled workers** required to meet increasingly complex outsourcing needs

Flexible service models including providing **scalable**, **cloud-based** service solutions from diverse geographies

1 Rationale for selection: India - largest BPO player globally | Philippines - large global player and comparable emerging market to Kenya | South Africa - largest BPO market in Africa
2 Accounting for 56% of service exports in FY 2024
3 Software Technology Parks of India

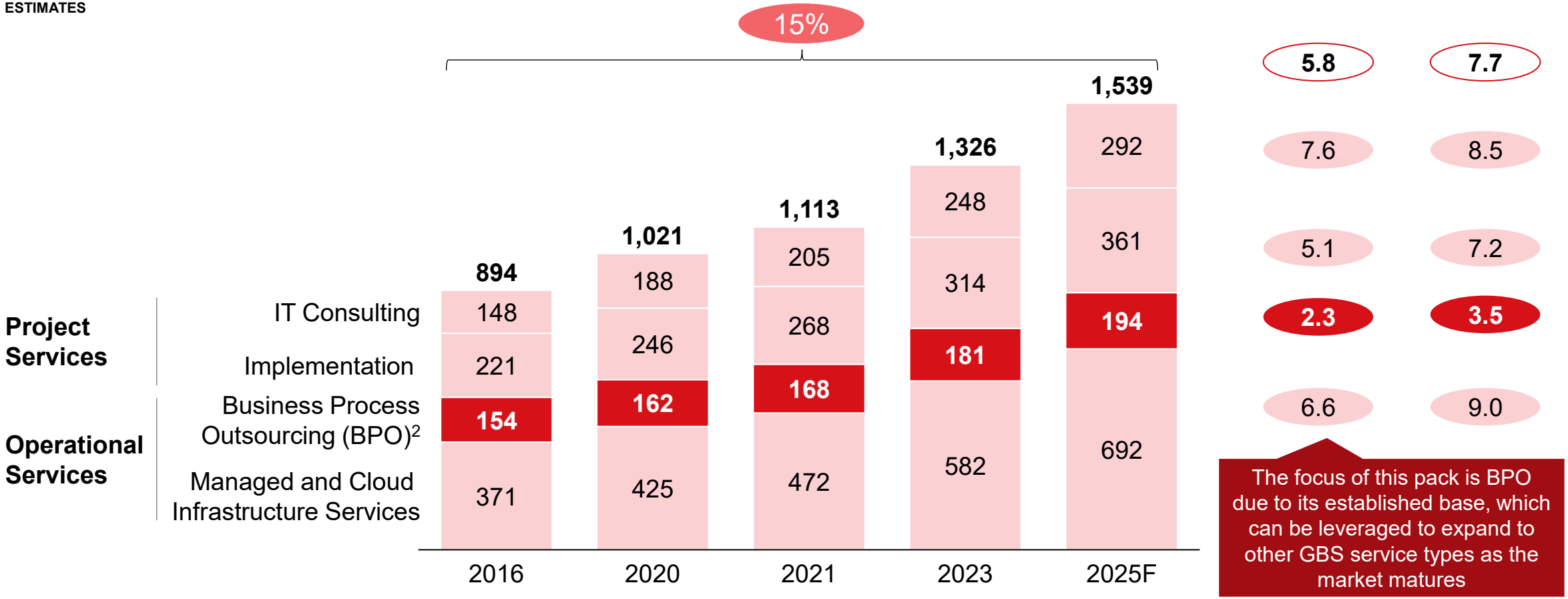
Source: India size – Invest India | Philippines size– Knight Frank | South Africa size- BPESA;

BPO accounts for ~15% of the GBS market and could reach $194Bn by end of 2025

xx% BPO share of GBS xx BPO

GBS end-user spend by service type[1], Bn $

ESTIMATES



	CAGR 2016-23, %	CAGR 2023-25, %
	5.8	7.7
	7.6	8.5
	5.1	7.2
	2.3	3.5
	6.6	9.0

The focus of this pack is BPO due to its established base, which can be leveraged to expand to other GBS service types as the market matures

1. Infrastructure as a Service (IaaS) not included
2. This document refers to ITES as part of BPO

Source: Gartner IT Services Market Forecast

Africa is uniquely positioned to address challenges facing the global BPO market…

Challenges facing the global BPO market	Africa's opportunity to address these challenges
Decline in traditional BPO models with increased adoption of digital-driven services for front and back-office operations	**Abundance of young, educated, digitally native talent** as over 12 million African youth enter the job market annually
Rising operating costs driven by scarcity of service talent in mature BPO markets leading to a search for talent in regions with a competitive cost base	**Cost competitiveness against mature markets** with labor costs in Kenya 60-70% lower than in America, Europe and Australia
Increasing customer demands as the digital CX market grows leading a shift to at-distance operating models to meet demand	**Improving digital infrastructure and growing tech ecosystems** to support the delivery of IT enabled services

Source: CustomerServ, Talenteum, McKinsey & Company

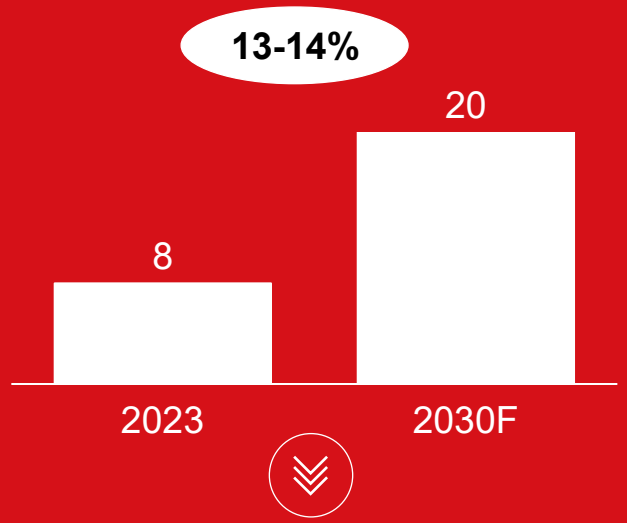
Leading to its growth into a global BPO hub as the market is projected to nearly triple to $20Bn by 2030

Offshore hubs across Africa and key services examples[1]

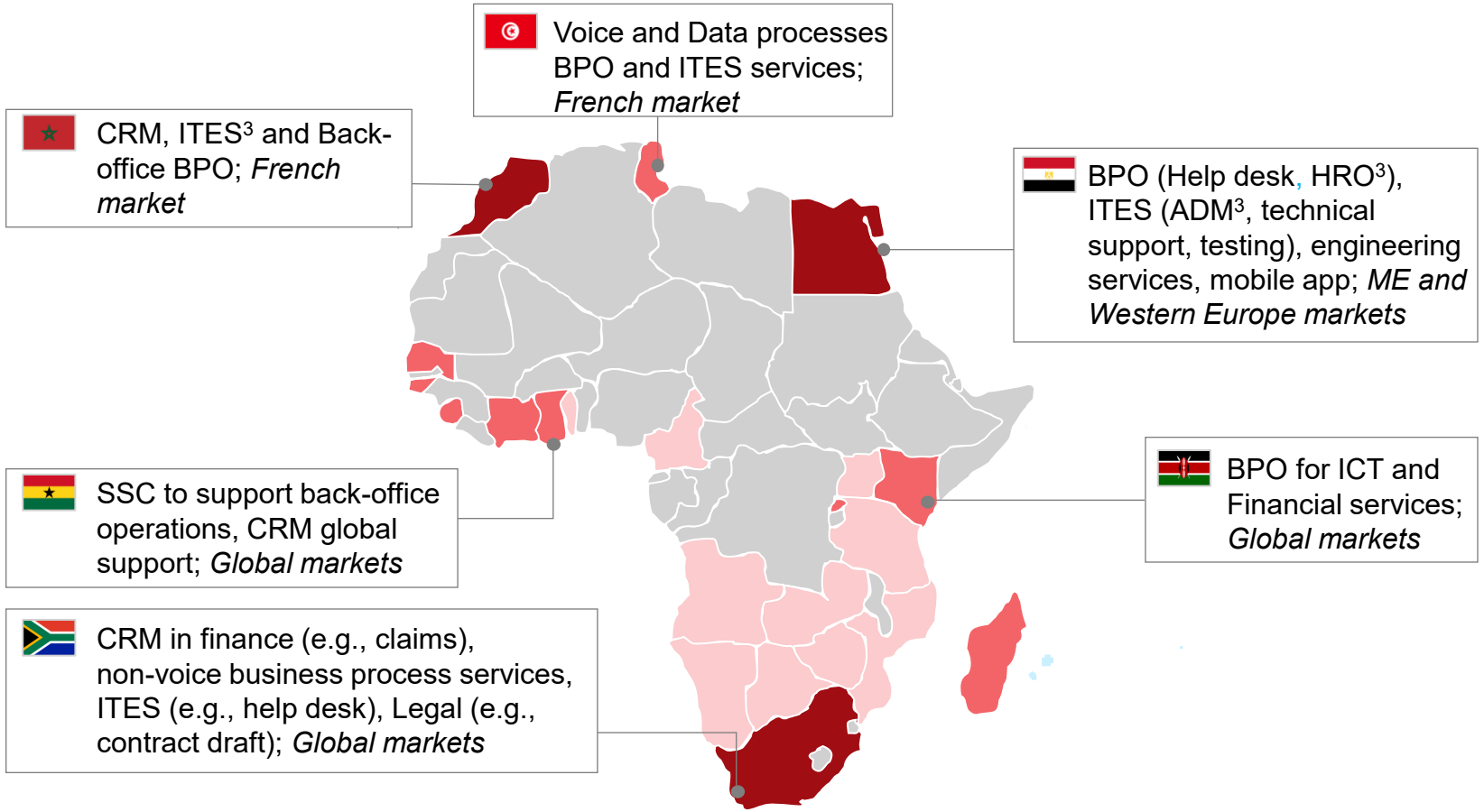
X CAGR **Hub:** Main outsourcing Growing Nascent

BPO market size in Africa, Bn $, CAGR[2]

Market growth in Africa is expected to be higher than global average growth of 4%



1.1Mn
employed as of 2023



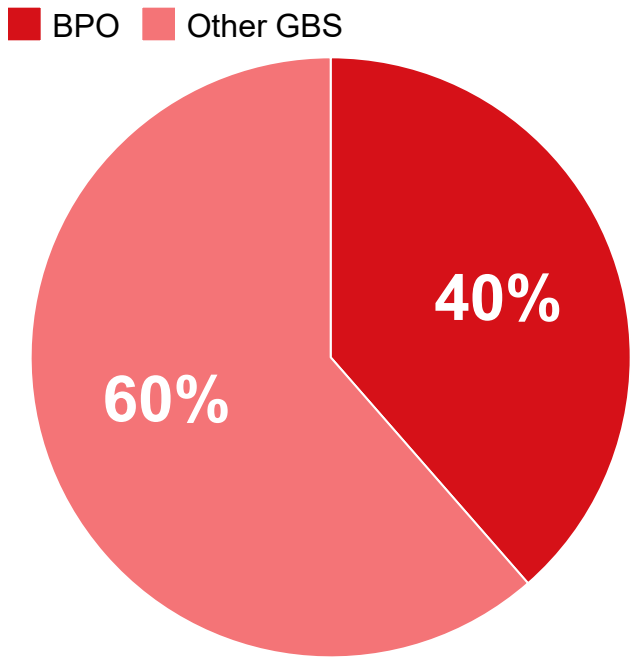
1. Service examples illustrate the most prominent service lines within respective markets
2. From Data Bridge Market Research; CAGR kept constant for values in 2023-28
3. Acronyms: ITES: Information Technology Enabled Services; HRO: Human Resources Outsourcing; ADM: Application Development and Maintenance; CRM: Customer relationship management

Source: Country's ministries, expert interviews, Everest Group, Elix IRR

Kenya's BPO market accounts for ~40% of its Global Business Services (GBS) industry at $270Mn

As of 2025

Size of Kenya's GBS and BPO[1] market, 2025, $ Mn



Total GBS **~$700**

Key service categories in Kenya

- Customer management
- Administration
- Operations
- Finance and Accounting

18.8%[3]
GBS growth per annum between 2023 and 2024

3.4%
of Africa's $8Bn BPO market

3.3%
of Africa's labor market[4]

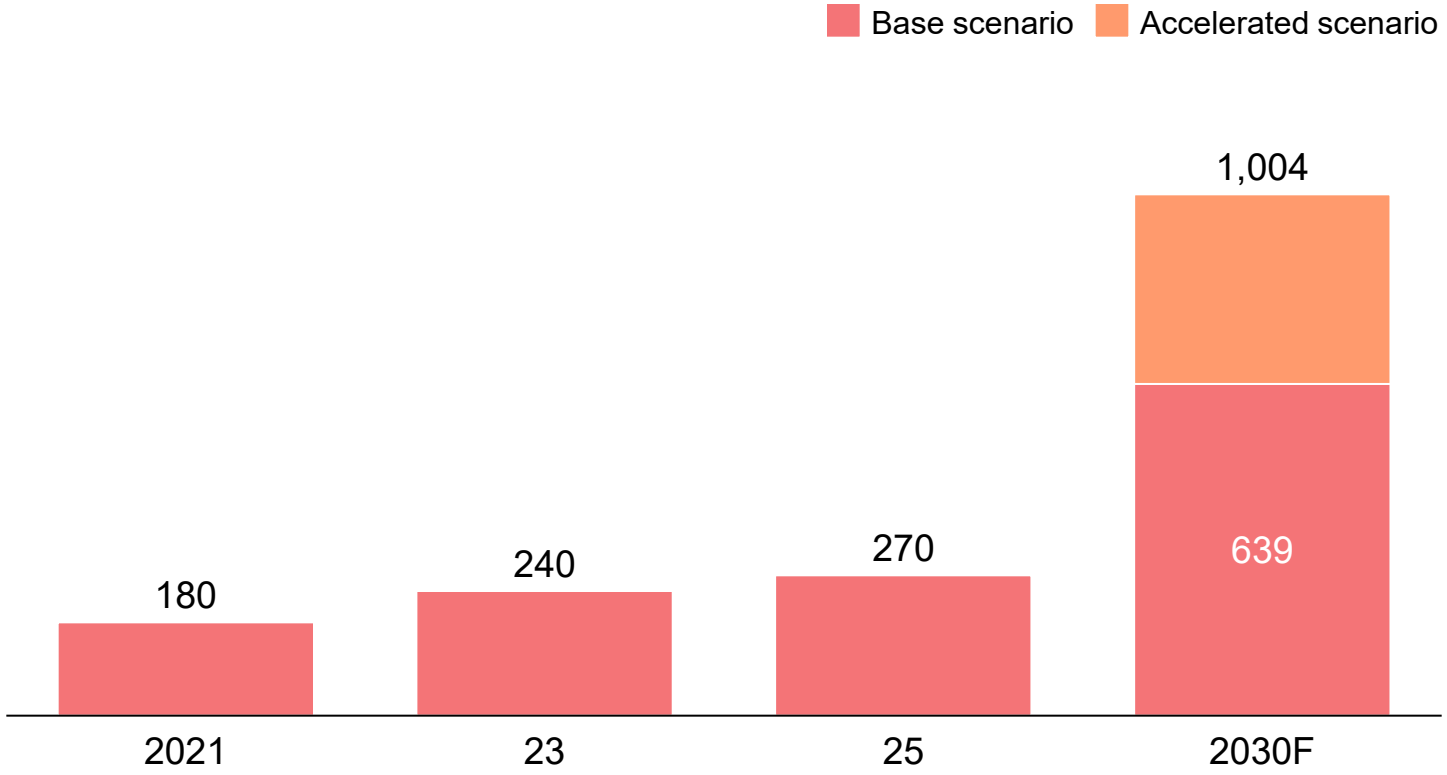
~36K
Kenya's estimated GBS workforce (2025)

1. This document refers to ITES as part of BPO | 2. Value of domestic GBS sector - $442M; value of international GBS sector - $267M | 3. Bottom-up calculations from Genesis Analytics | 4. 1.1 Million Africans are employed in BPO per Genesis Analytics

Source: Statista, Genesis Analytics

Kenya's BPO market could grow to up to $1 Bn by 2030

Kenya's BPO sector growth[1], 2025-2030F, $ Mn

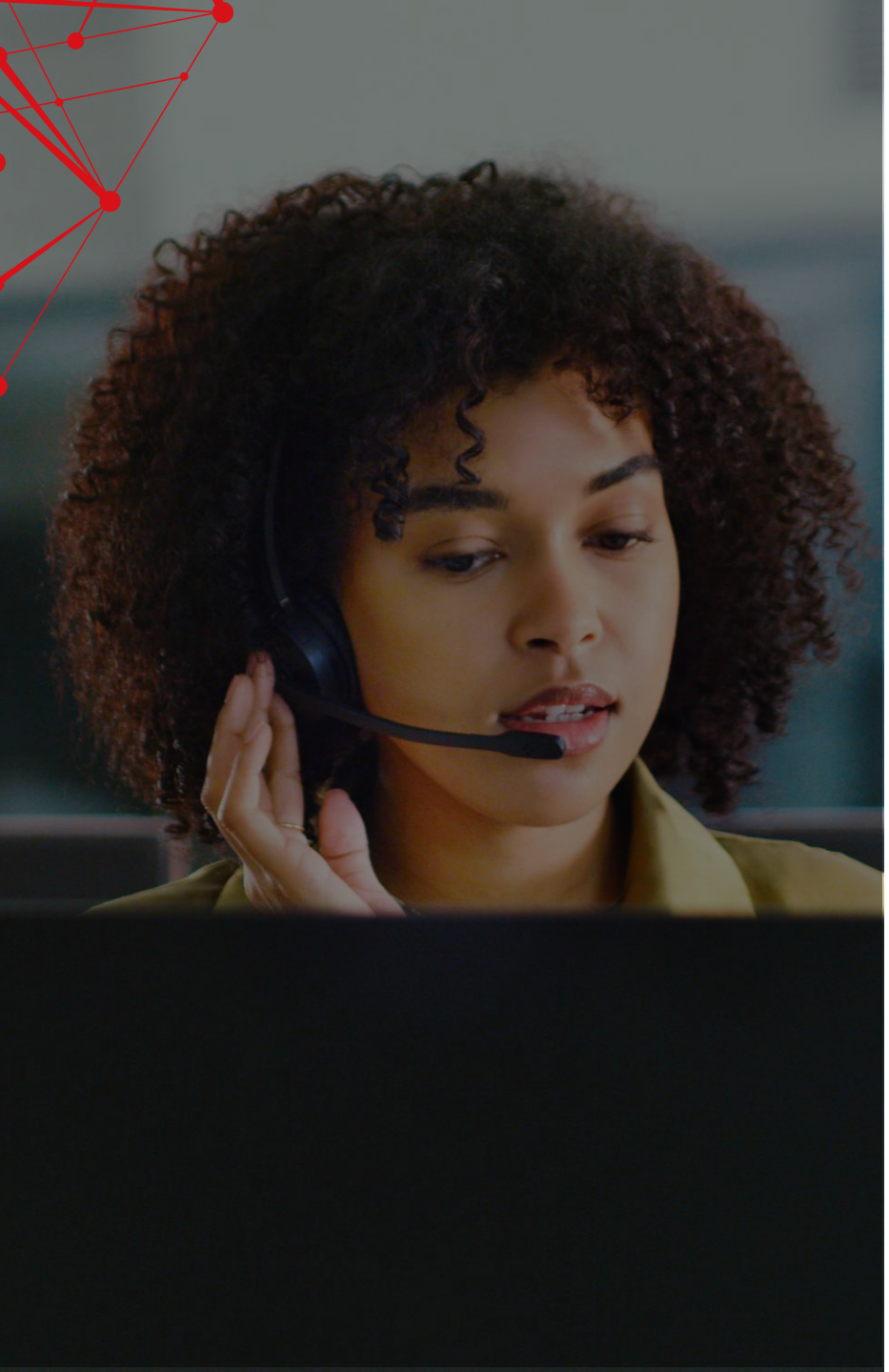


Drivers of BPO growth in Kenya

- **Cost-competitive** BPO offerings compared to peer countries
- **Robust digital infrastructure** enabled by **6 sub-sea cables** and over **1.5 Mn internet subscriptions**
- Friendly business climate including strong **investor protection regulations**
- **Fiscal and non-fiscal incentives** offered in **Special Economic Zones** and **Export Processing Zones**
- A readily available, **tech-savvy workforce** with **high levels of English proficiency**

1 Base scenario assumes growth at 18.8% p.a. in line with Kenya's GBS market growth rate from 2023-24 per Genesis Analytics. Accelerated scenario assumes growth at 30% per annum

Source: Kenya National Bureau of Statistics, Statista, Genesis Analytics



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Kenya's competitive advantage sets it apart for BPO services

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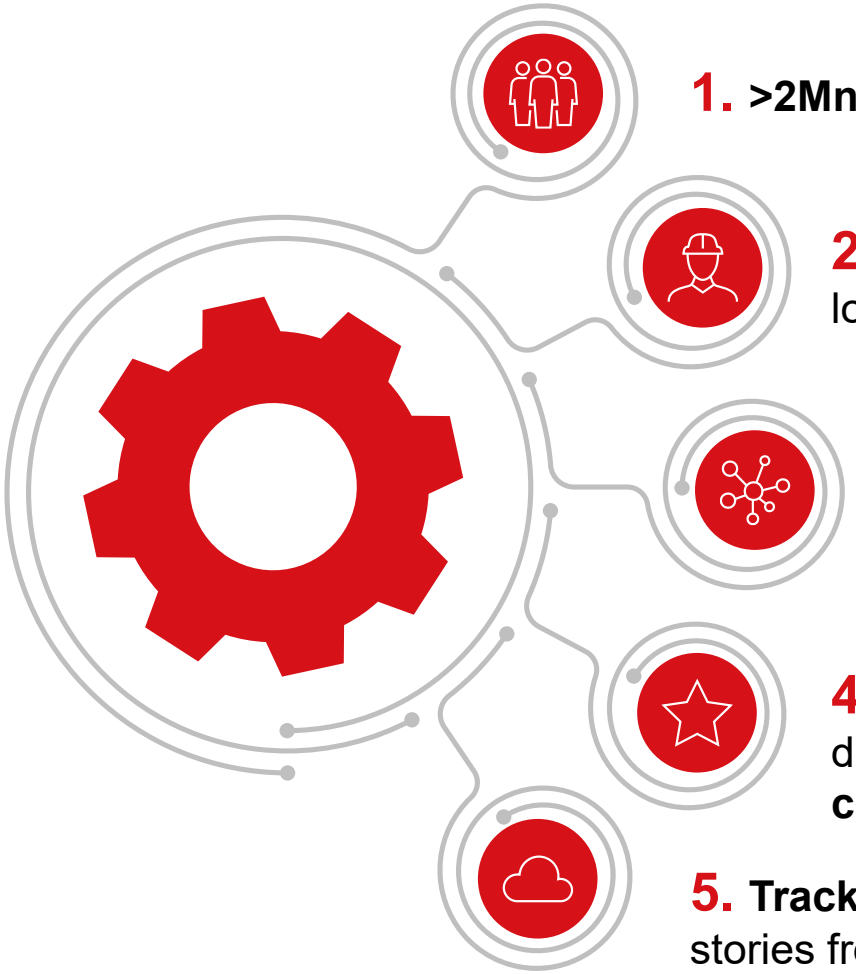
Details follow



1. **>2Mn young**[1], tech-savvy and trainable **workforce** (**642K** proficient in B2 English)

2. **Competitive BPO labor costs** across employee categories (17%-59% lower than South Africa)

3. **Access to regional markets** (great connectivity to the 331Mn East African population) **and international markets** (e.g., Europe, US, and Asia) given GMT+3 time zone

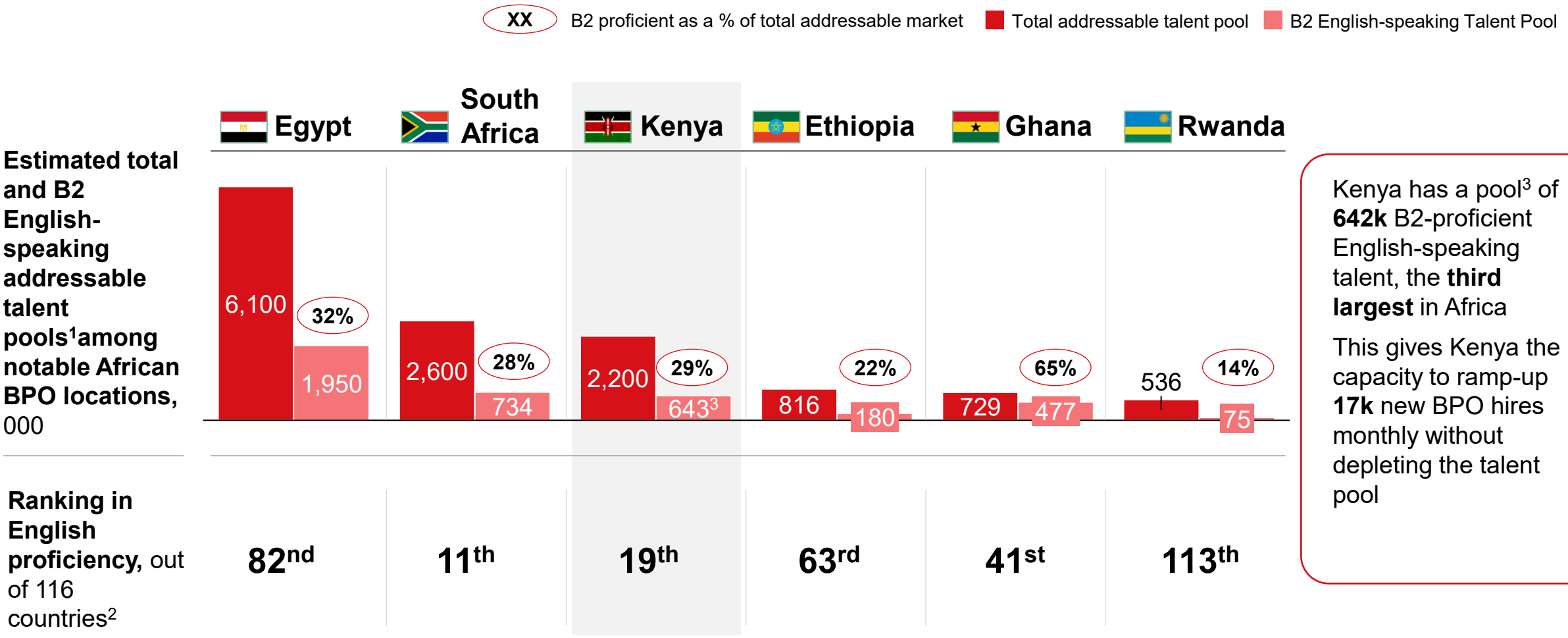
4. **Advanced IT-enabled** digital service delivery make Kenya a booming digital hub known as the **Silicon Savannah** driven by **reliable digital connections** via 6 undersea fiber optic cables

5. **Track record of attracting BPO investment** – illustrated by several success stories from international investors featured in this section

1 Between 18 and 35 years old

Source: Experts input, Genesis Analytics, Submarine Cable Map

1. Kenya's share of English-speaking professionals is comparable to peers; it ranks relatively high on English language proficiency



Kenya has a pool[3] of **642k** B2-proficient English-speaking talent, the **third largest** in Africa

This gives Kenya the capacity to ramp-up **17k** new BPO hires monthly without depleting the talent pool

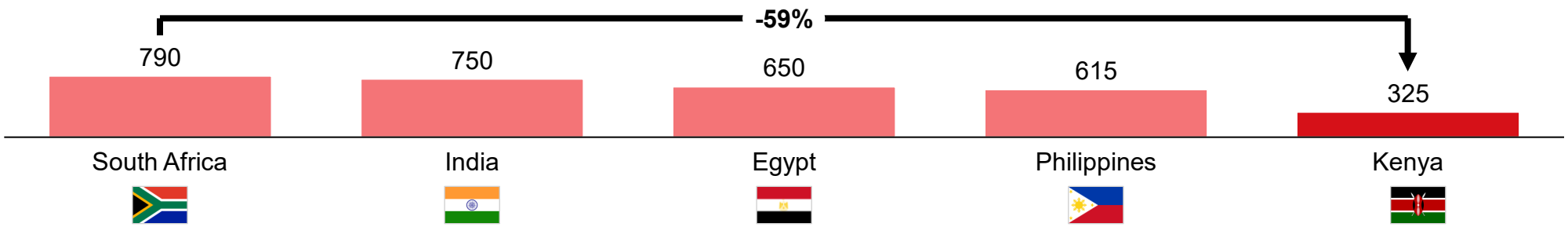
1 Not specific to BPO sector, but addressable talent pool within the total workforce
2 EF English Proficiency Index (EF EPI) is an annual ranking that measures English language skills worldwide based on data from English tests taken online, out of 116 countries
3 Represents addressable talent pool compared to ~36,000 currently employed in the GBS/BPO sector
Source: 2024 Africa GBS Benchmarking & Market Report; GBS World

2. BPO salaries across different levels in Kenya are relatively low

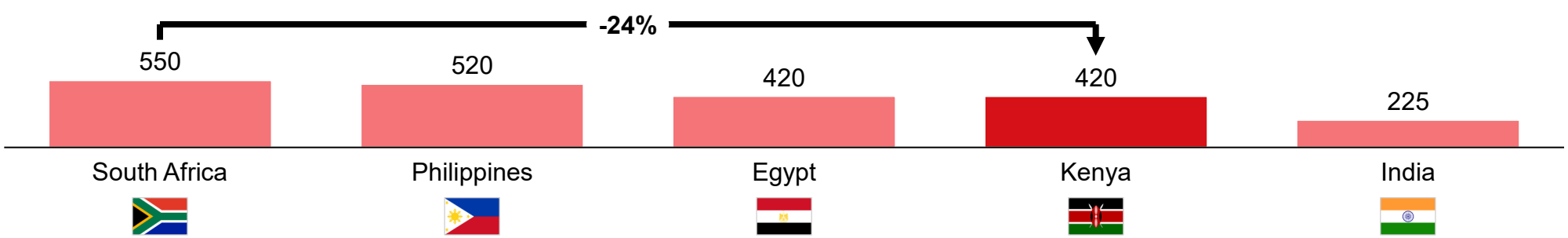
Gap between peer leader and Kenya

Employee | **Average monthly salary, $**

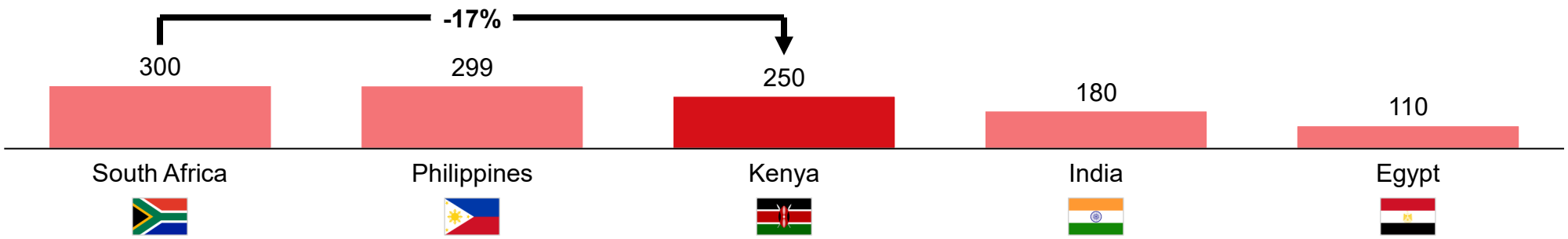
Team leader



Supervisor



Agent



Source: TRIFIC, Glassdoor

2. Compared to peer average, labor costs in Kenya are lower for half of key service lines, including domestic and international agents

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xx More expensive compared to peers xx Cheaper compared to peers

	Job description	Kenya	Poland	Malaysia	South Africa	Jamaica	Philippines	Egypt	India	Rwanda	Ghana	Peer average
Competitor market contact center/BPO monthly salary comparisons, $	**Agent Level – Domestic**	252	446	425	367	330	255	198	178	147	143	276
	Agent Level – International	336	595	567	489	440	340	264	220	196	190	367
	Team Leader	629	855	923	625	504	533	437	368	315	360	547
	Operations/CC Manager	1,469	2,800	2,100	2,177	1,354	1,333	989	776	740	690	1,417
	QA/Coach	491	830	826	528	377	446	395	350	300	340	488
Competitor market technology/ITES monthly salary comparisons, $	**IT Help Desk Agent**	316	731	761	484	381	383	291	205	240	210	376
	Technical Support Specialist	568	1,125	1,146	753	517	565	550	346	340	320	629
	Software Developer	1,136	1,521	1,519	1,962	858	783	614	513	600	490	983
	Data Analyst	787	1,432	1,367	1,704	678	705	515	488	490	362	860
	IT Manager	2,021	2,932	1,911	3,226	1,684	1,421	1,700	780	870	1,270	1,755

Source: 2024 Africa GBS Benchmarking and Market report, GBS World

2. Operational costs in Kenya's contact centers are also lower

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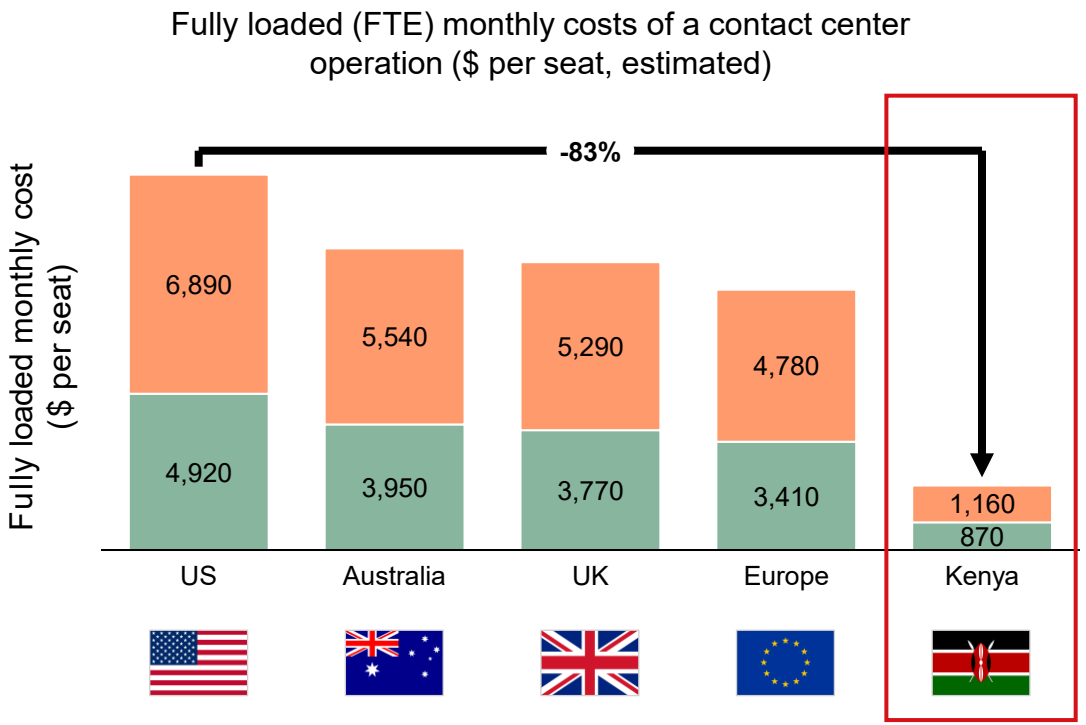
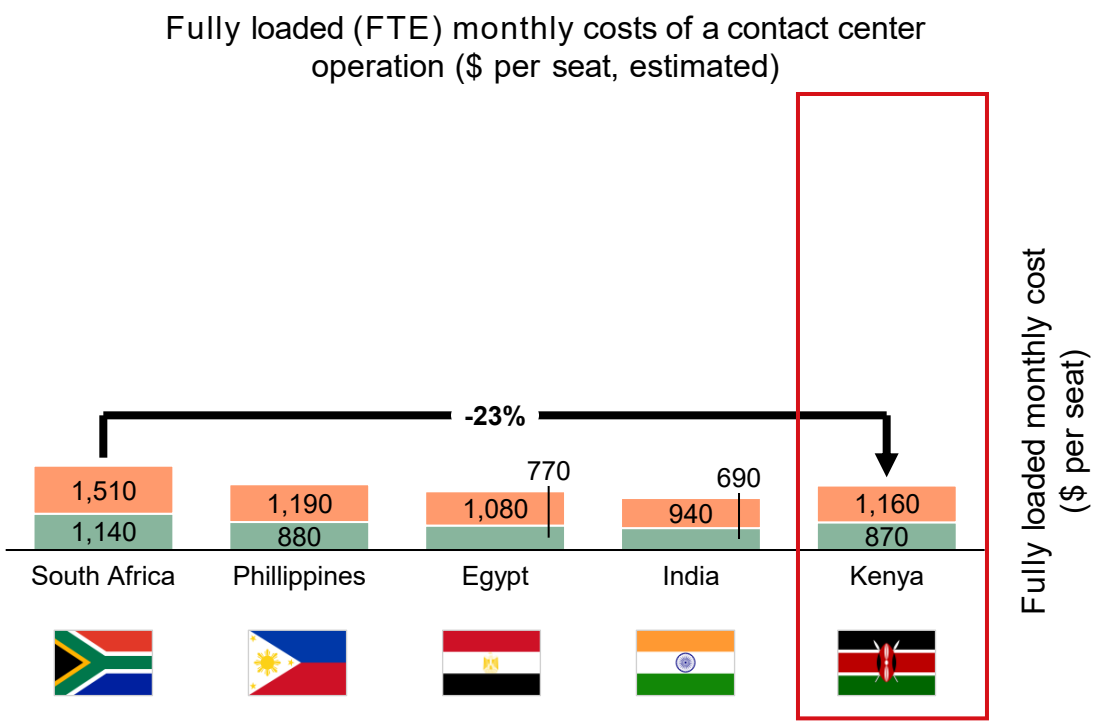
Minimum Maximum

Kenya is ~83% and ~23% cheaper than the highest-cost countries among developed economies and emerging markets respectively

Fully loaded (FTE) Source Market contact center monthly costs vs. developed economies[1]



FTE Competitor Market contact center monthly costs comparison vs. emerging markets[2]



1. Countries selected for high BPO demand
2. Countries selected based on high BPO supply

Source: 2024 Africa GBS Benchmarking and Market report, GBS World

3. Kenya offers easy access to global and regional markets…

Seamless access to Europe and 24/7 support for the US

International Access

~9 hours
Direct flights to Europe

~8 hours
Access from Asia

<15 hours
Direct flights to the US eastern seaboard

Regional Access

Gateway to East African markets, and other markets through the AfCFTA[1]

331Mn+
East African population

Cross-border logistics hub

Cultural compatibility

Shared business etiquette

Alignment with western values

Fluent English communication

Global business appeal

Preferred hub for global outsourcing

Trusted by international brands

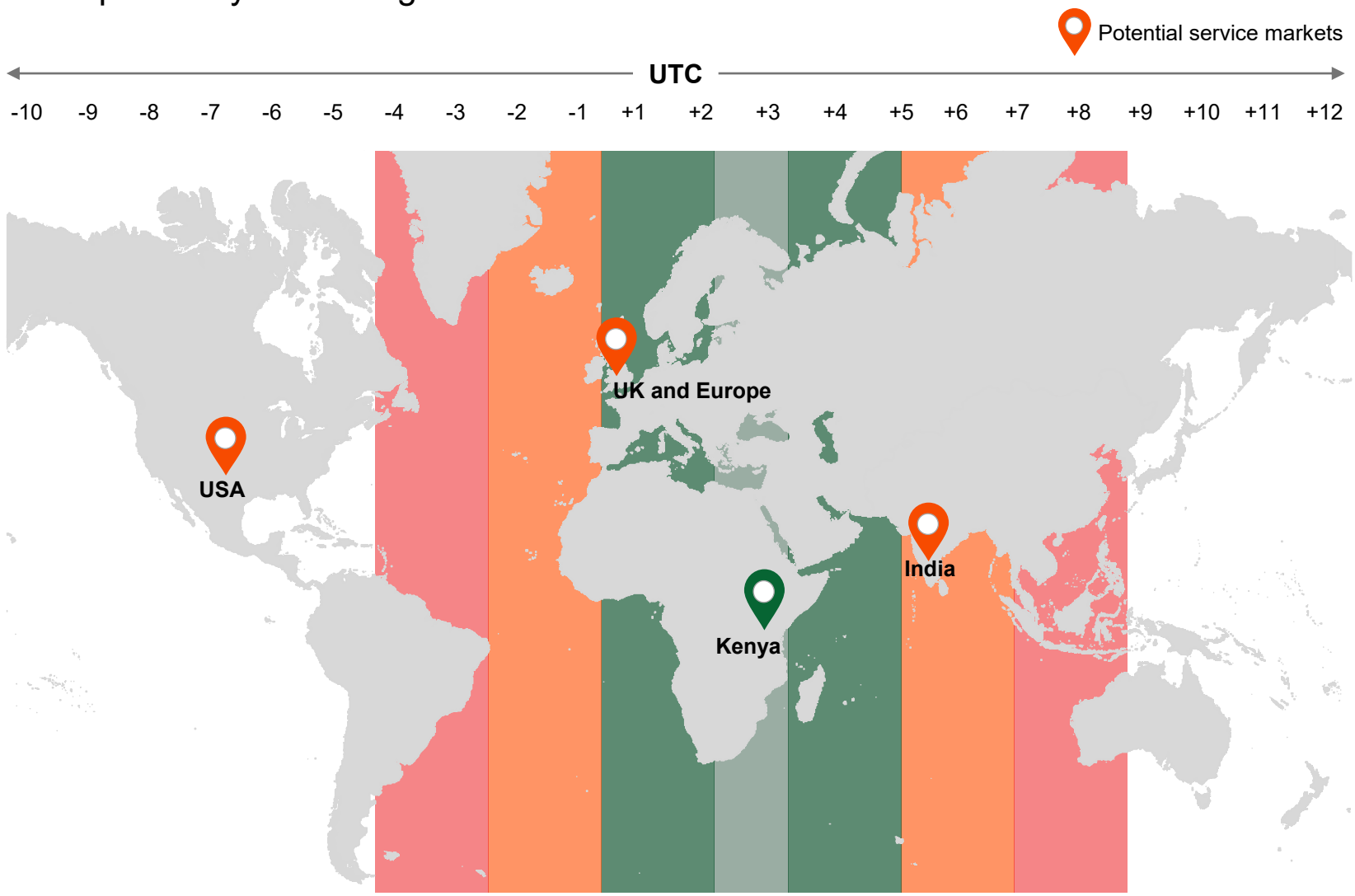
Diverse portfolio of services

1. African Continental Free Trade Area

Source: 2024 Africa GBS Benchmarking and Market report, GBS World

And its strategic time zone enables service to diverse markets

Overlap of Kenyan working hours with different customer markets



- >75% overlap in working hours[1]
- >50% overlap in working hours[1]
- >25% overlap in working hours[1]

Benefits of Kenya's time zone

- Reduced **night-shift fatigue**
- Higher **employee satisfaction**
- Easier **real-time collaboration**
- **Lower costs** when teams don't need to work late hours

1 Assuming an 8-hour 9.00 a.m. to 5.00 p.m working day
Source: Expert input

4. Popularly referred to as Silicon Savannah, Kenya is a prime destination with digitally-enabled service delivery

Mobile innovation

138.5%[1] mobile penetration in 2024

2.5B+ mobile money transactions in 2024, with **$65B+** transacted

~79% mobile money penetration rate with **40M+** mobile money subscribers

Sample players

M-PESA, airtel money

Internet connectivity

1.5M+ internet subscriptions

6 undersea cables

20,000KM of fiber optic cable installed and over **100,000KM** planned

Sample players

zuku, JTL Jamii Telecom Your Trusted Business Partner, SEACOM

Investment and funding

29% of Africa's start-up funding and **90%** of East Africa's total in 2024 **($648M)**

Sample players

M-KOPA, SunCulture

1. 70 million active SIM subscriptions

Source: Communications Authority of Kenya, Central Bank of Kenya,, Press Search

5. Success story: Teleperformance has successfully established itself in Kenya with 4 offices with 2.5K seat capacity

Teleperformance
each interaction matters

Teleperformance is a global leader in **front-office and AI-Data services** offering top-tier customer experience and content moderation in Kenya

4 offices currently, with plans to operate from a single facility at the TRIFIC SEZ

2,500 seats capacity

1,800 full time employees with plans to grow team up to 10,000 in the next five years

How Kenya supported Teleperformance success

Government support: Collaboration with ICT, MITI, and Labor ministries has **improved legal clarity**; further opportunities for public-private cooperation to unlock more

World-class infrastructure: Facility at TRIFIC SEZ will increase Teleperformance's **total capacity to 5,000**

Access to talent: Kenya's **motivated, English-proficient workforce** drives success; planned job creation will attract more investors

> **Kenya has proven to be a high-potential BPO destination**. The people are driven, speak excellent English, and the societal impact of job creation makes this market uniquely rewarding
>
> – **Sven de Cauter, Country Director - Kenya**

Source: Company interview

5. Success story: CCI International is well established in Kenya with a 5,000-seat facility in Nairobi's Tatu City Special Economic Zone

CCI International is a **leading BPO provider** with a focus on **front-office** and **IT-Enabled Services** from the Tatu City SEZ in Kenya.

80+ corporate clients across retail, e-commerce, tech, telecommunications, and travel

20 Mn average monthly customer interactions

~5,500 employees in Kenya, operating the country's largest contact centre, with ambition to grow to over 20,000 in the next few years

How Kenya supported CCI International success

Government Support: Policy support and **improved incentives** – especially in SEZs – make Kenya a competitive player in the global BPO market

Talent & Training: Digital skills and workforce readiness programs align with CCI's talent pipeline requirements fueling growth

Infrastructure & Incentives: CCI leverages Tatu City's Special Economic Zone, offering **top-tier infrastructure** and **business-friendly incentives**

> If you're looking to build a business that's **future-ready, scalable,** and **socially impactful** – Kenya is the place to be
>
> **– Rishi Jatania, CEO, CCI Kenya**

Source: Company interview

5. Success story: Tana is leading the way in global staffing for IT-Enabled Services driven by the strength of Kenya's talent

tana

Tana is a market leader in **IT-Enabled Services**, enabling companies to scale by embedding **full-time, remote tech and data talent** from Kenya into their teams

100+ full time employees within 2 years of operation, and plans to scale up 10x in the next 3-5 years

60% of full-time employees are women

7 countries represented within Tana's client base, including companies from the US, UK, and Canada

How Kenya supported Tana's success

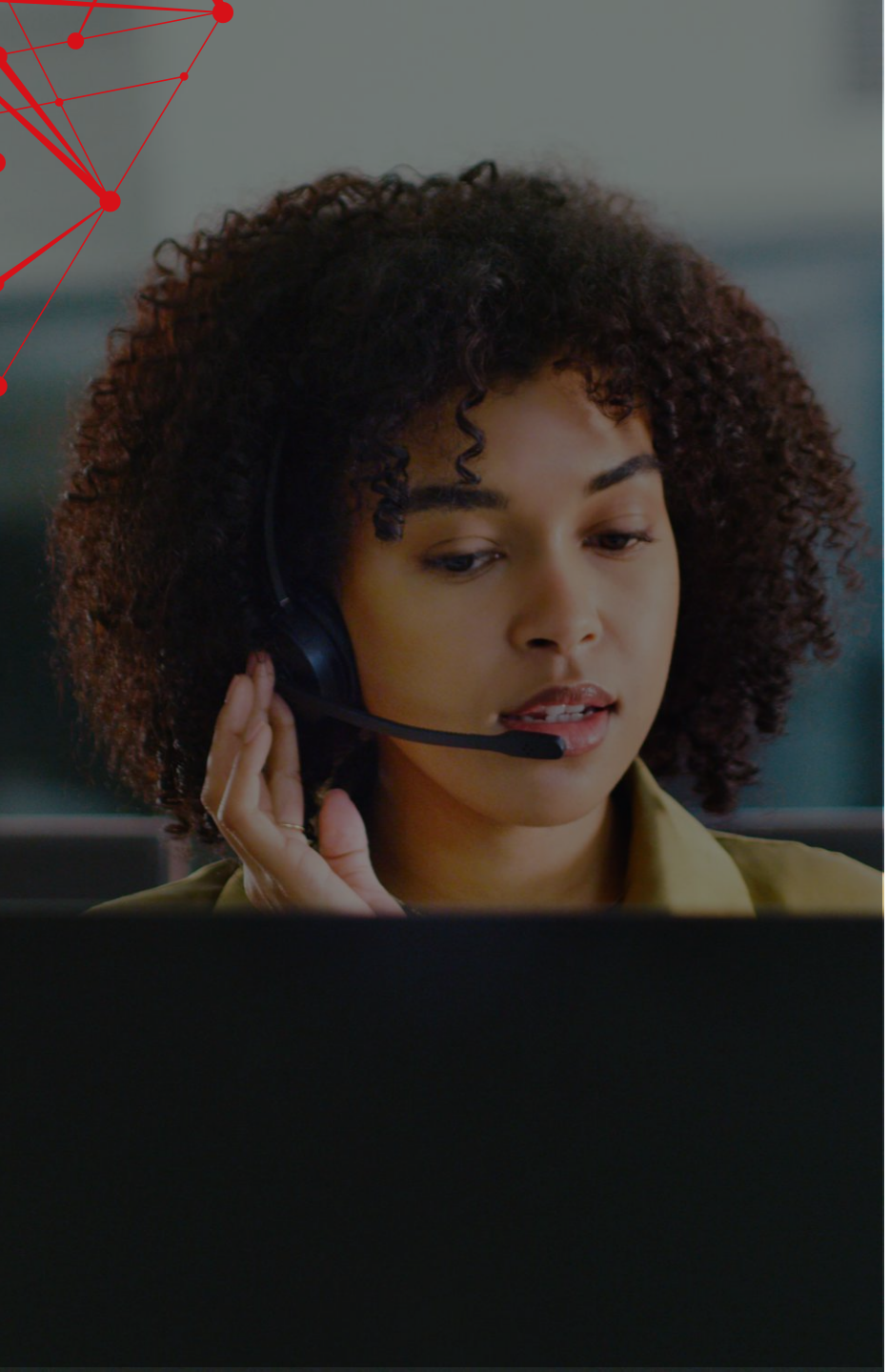
Government support: seamless establishment of the business, supported by KenInvest's **work permit facilitation** and **business registration guidance**

Business-ready infrastructure: Kenya's SEZs offer the infrastructure and incentives to **scale with confidence**

Talent advantage: Kenya's universities and digital skills programs make it easy to tap into a **motivated, tech-savvy workforce** ready for global delivery

> Kenya is one of the most overlooked sources of global tech talent – young, driven, and ready to deliver. With infrastructure improving rapidly, **the opportunity to build here is now**
>
> – **Saagar Shah, Co-Founder – Tana**

Source: Company interview



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Investment potential exists across 3 BPO sub-sectors in Kenya

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	1 ITES[1] and Knowledge Process Outsourcing (KPO)	2 Front office	3 AI-data services
Current activity in Kenya	Kenya is a regional leader in IT helpdesk, application development and cloud services, with emerging market research and data analysis capabilities	Established outsourcing destination, especially for customer service and lead generation	Regional leadership as an AI solutions delivery leader with opportunities for further growth
Example operators	iSON xperiences, TECHNO BRAIN Empowering Lives, tana	CCI KENYA, TELESKY TECH., Teleperformance	cloudfactory, sama
Opportunity going forward	**Leverage the 'Silicon Savannah' ecosystem** to enhance digital services while **positioning as a research hub** through competitive offerings[2] and a growing pool of skilled graduates	**Expand and strengthen existing service offering** to establish Kenya as a leader	**Develop talent and infrastructure** to strengthen AI services capabilities

1 IT-Enabled Services includes product offerings such as IT helpdesk and remote troubleshooting that are conducted using a variety of IT-based tools
2 E.g., engineering, legal, and healthcare | 3. Including call centers, helpdesks, technical support, lead generation
Source: Expert input

1. IT, data, and software services are attractive in Kenya's BPO market

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High-potential service lines

ITES KPO

ITES and KPO

- IT Application Development and Maintenance
- IT Help desk and Technical Support
- Software testing and quality assurance
- Data analytics and big data processing
- Market research and business intelligence
- Specialized knowledge processes[1]

ITES and KPO monthly salaries in Kenya, $

316
Help desk support, **16%** lower than peer average

787
Data analyst, **8%** lower than peer average

1,136
Software developer, **42%** lower than market leader[2]

Key competitive advantages in ITES and KPO

Digital skills pipeline
Kenya produces **10K+ ICT graduates per year**, with many trained in data annotation and IT support

Rising analytics talent
Universities and bootcamps producing data scientists and analysts, e.g., Moringa School

Regional innovation hub
Nairobi hosts Microsoft and Google innovation centers, and an IBM research lab

1 e.g., legal, engineering, healthcare, and financial services
2 South Africa
Source: 2023 Global Voice of the Buyer Survey; Genesis GBS | GBS World; Expert input

2. First-rate multichannel delivery capabilities make Kenya a dynamic market for customer service and support

XXX Competitive advantage

Cost-efficient

- Cost advantage
- **$252-336** monthly agent salary, ~11% lower than peers

Customer Engagement

- **70%** offer omnichannel solutions
- **90%** voice support prevalence

Operational Excellence

- High customer satisfaction ratings
- **15-20%** Low attrition rates
- Prevalence of ISO-certified BPO providers

Technology adoption

- Speech analytics gaining traction
- **45%** social media integration
- Cloud-based CRM systems
- AI adoption for chatbots and analytics

Additional competitive advantages

- Workforce specialization
- Skilled CX agents, e.g., neutral accents
- Expertise in social media and email support

Key verticals served

Retail and Airlines | **Telecom and Healthcare** | **Banking and Insurance**

Source: 2023 Global Voice of the Buyer Survey; Genesis GBS | GBS World

3. Local AI data service providers offer a range of services

Key service lines

Data annotation

Labelling or tagging raw data to be usable for AI systems

Computer vision

Enabling computers to interpret and understand visual data, such as images and videos – with specific usage in agricultural technology in Kenya

Data collection

Gathering structured and unstructured data from diverse sources, creating a rich dataset for AI projects

Machine learning model development

Testing machine learning models through iterative feedback, error minimization, and consistency checks

Example clients

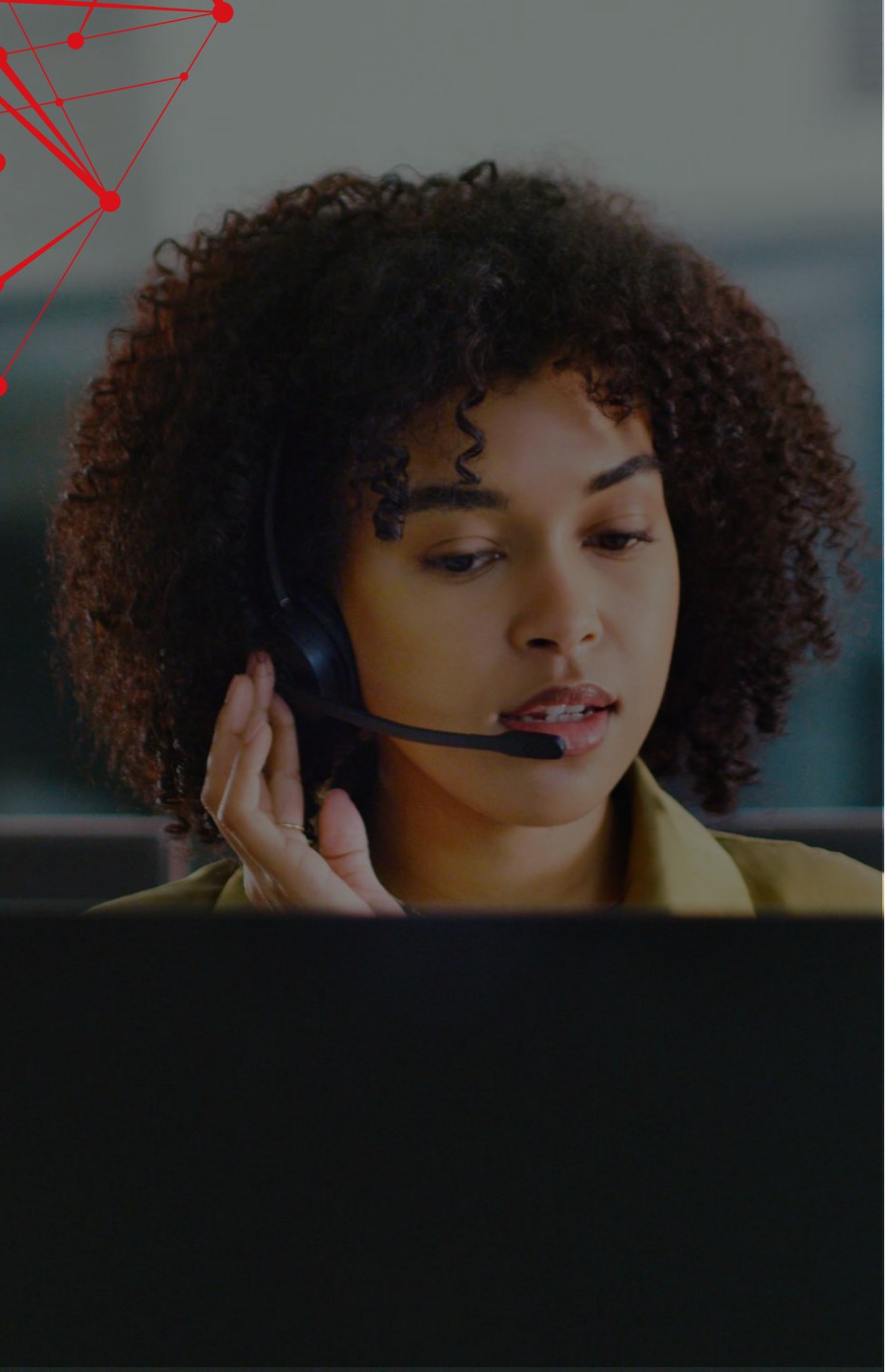
PRECISION AI

NVIDIA

Competitive advantages

- Leadership in **data annotation** and **AI outsourcing** – Kenyan teams have supported AI development for companies like Google and Microsoft
- Regional **leadership in African language datasets and localization** – involvement in Mozilla Common Voice – Kiswahili Dataset

Source: Company websites, DC Byte, Open University of Kenya



Invest IN KENYA

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Supportive investment incentives across Kenya's BPO market

Detailed next

A Comprehensive investor and data protection laws, and cyber-security policies

Kenya's **Data Protection Act,** is anchored on international regulations such as the EU's GDPR[1], ensuring global compliance while investors are protected through **various investor protection laws**

B Economic zones providing infrastructure support for BPO companies

Special Economic Zones like **Tatu City, Two Rivers International Finance and Innovation Centre, and Konza City are** attracting players like CCI Global and Teleperformance, while Export Processing Zones also host BPOs

KONZA Technopolis · TATU · TWO RIVERS International Finance & Innovation Centre

C Government commitment to growth of the sector

The government plans to **create at least 400K jobs in the digital and BPO sectors within 5 years** supported by ward-level digital hubs and nationwide centers of excellence

Ministry of Information, Communications & The Digital Economy

D Public and private sector efforts towards skill development

Various initiatives and programs to **develop digital skills** have been undertaken by the public and private sector

AJIRA ajiradigital.go.ke

1. The General Data Protection Regulation

Source: Expert interviews

A. Kenya provides a comprehensive investor protection framework

- Foreign Investments Protection Act, Investment Promotion Act, and Investment Disputes Convention Act safeguard foreign investments and facilitate investment processes

Investment facilitation

KenInvest fast-tracks approvals for investors

Profits repatriation

Approved enterprises can transfer their profits or retained earnings abroad[1]

Expropriation safeguards

No approved enterprise or its property can be taken over without adequate and timely compensation

Dispute resolution

Arbitration rulings serve as legally binding safeguards to resolve disputes

Risk mitigation

Investors receive fiscal and non-fiscal incentives

1. Subject to withholding tax except for branches of foreign enterprises

A. Kenya's data protection laws guard against data misuse, enhancing security of potentially sensitive BPO client data

Extracts from the Data Protection Act (2019)

01

Lawful processing

Data must be collected and processed legally

02

Purpose limitation

Data must be used solely for the intended purpose it was collected for

03

Data minimization

Only necessary data must be collected

04

Accuracy

Data must be kept up to date

05

Storage limitation

Data must not be retained longer than necessary

06

Security and confidentiality

Organizations must ensure appropriate data security measures

07

Accountability

Data controllers must ensure and demonstrate compliance with data regulations

08

Data subject rights

Individuals hold the right to consent, access, correct, delete, opt out, and request data erasure

In 2024, Kenya and the EU commenced the first Adequacy Dialogue on the African continent; an Adequacy Decision will permit the flow of personal data from the EU to Kenya without restrictions

Source: Data Protection Act, 2019; Delegation of the European Union to Kenya

A. Kenya ranks top 5 in cybersecurity in Africa, with policies to support operational resilience

Progress Kenya has made so far in cybersecurity		Strategic focus of the Draft Kenya Cybersecurity Strategy (2025-2029)
#21	Kenya's global ranking in the ITU's Global Cybersecurity Index (2024), and a **Top 5 ranking in Africa**	Enhanced **regulations and policies**, strengthening institutional framework for cybersecurity governance with **clear leadership and accountability**
2.5B	Cybersecurity threats detected between January and March 2025 by Kenya's National Kenya Computer Incident Response Team – Coordination Centre[1], with **13 million threat alerts issued**	**Proactive incident identification**, mitigation, response, and management to **enhance protection and resilience** of **critical information infrastructure**
200+	Current members of the **Kenya Cybersecurity and Forensics Association**	**Cybersecurity capability building** and capacity development, including through **public and private sector cooperation and international collaboration**

What this means for a BPO player

Strengthened cybersecurity and critical information infrastructure, with enhanced **governance and accountability frameworks**

1. National KE-CIRT/CC

Source: Kenya Draft Cybersecurity Strategy (2025-2029); ITU; Communications Authority of Kenya; Kenya Cybersecurity & Forensics Association

B. Economic zones offer incentives and infrastructure support to investors

NOT EXHAUSTIVE

Select examples

Two Rivers International Finance and Innovation Centre (TRIFIC), Nairobi County

- **102 acres** designed to **provide competitive incentives,** e.g., duty-free imports, 10% corporate tax for first 10 years and 15% next 10 years
- **One-stop shop** for regulatory support services, e.g., licenses, work permits (Teleperformance has set up in TRIFIC)
- **Plug and play office solutions** including fully furnished and serviced office spaces and a business arbitration court

Tatu City, Nairobi County

- **5,000-acre** mixed-use SEZ with **attractive incentives** including zero-rated VAT and withholding tax relief
- **World-class infrastructure** providing reliable power, water, transport links, and ICT connectivity
- **Growing BPO ecosystem**, e.g., CCI Global $ 50Mn call center and Eneo, an upcoming BPO facility and hub

BPO operators can **establish operations** in **Export Processing Zones**[1] nationwide, benefiting from **flexibility to gazette individual buildings as EPZs,** enabling expansion to areas like Kisumu, Mombasa, and Nyeri

> Kenya is seen as a favorable destination for outsourcing due to its workforce that has excellent linguistic skills and the ability to provide cost-effective solutions
>
> *– Gary Slade, CEO, Teleperformance*

> Our decision to expand across Kenya reflects our profound confidence in the country's thriving BPO industry and its capacity for sustained growth
>
> *– Martin Roe, CEO, CCI Global*

1 e.g., Sama Source at Sameer Business Park

Source: TRIFIC, Tatu City

C. Kenya's aspiration to become a digital economy underpins the expected growth in its BPO market

2008

Kenya Vision 2030: Supports tech and innovation hubs[1]

2009

ICT Board launched the **"Kenyan BPO Value Proposition"**[2] which outlined the thriving economy, public sector support, and the nascent BPO sector as reasons to invest

2022

Kenya National Digital Master Plan (2022-32), prioritizing digital infrastructure expansion, digital skills development, and digital innovation

2024

GoK commitment to **create 500K jobs within BPO in the near term and 1 Mn digital jobs by 2026**

GoK announcement **of roll-out of 1,450 digital hubs**, one in every ward, aimed at empowering **1Mn youth in the next 5 years** with employable skills for remote working

2025

Government introduced **zero-rating for import-ed computers** and streamlined investment procedures

National Policy on BPO[3]: Comprehensive framework aimed at positioning the country as a leading BPO destination in Africa

GOK launched a **5-year Nyota program** supported by the World Bank which focuses on the BPO Growth and Youth Employment initiatives and aims to create **820,000 jobs**.

2026

Development of **Digital Labor Policy**, and **Digital Job Creation Strategy** in collaboration with the ILO, with a target resolution date of January 2026

1. Including the establishment of Konza Technopolis and implementation of the National Broadband Strategy | 2. This marked the start of aggressive global marketing to attract BPO investors | 3. Draft National BPO Policy

Source: Government of Kenya

D. Government and private sector players have initiated programs to enhance digital literacy and skills

Public sector program

Initiative	Partners	Description
AJIRA ajiradigital.go.ke	Ministry of Information, Communications & The Digital Economy; KEPSA; eMobilis	GoK launched **Ajira Digital Program** in 2016 to equip over **1Mn** youth with digital skills every year Over **109,000 youth have been linked to digital jobs** through the program, with about **336,000 undergoing digital training**
Kenya National Digital Literacy Skills Curriculum	Ministry of Information, Communications & The Digital Economy; ICT Authority	**National Digital Literacy Skills Curriculum** was launched in May 2025, targeting **20 Mn digitally empowered citizens** by 2032 across 4 levels of competence - foundation, basic, intermediate, & advanced
DSEAP Digital Skills and Employment Advancement Program	KEPSA; Microsoft	A program that offers **digital skills training** and **certification in Cloud, Generative AI, Cybersecurity, and Sustainability** to empower young people in Kenya for opportunities in the digital economy
MORINGA Discover · Grow · Transform; alx	Mozilla; mastercard foundation	Institutions offering diverse training programs across topics including **data analytics**, **cybersecurity**, **AI**, and **digital skills**

Source: Ministry of Information, Communications & The Digital Economy, ICT Authority, KEPSA, alx,,Moringa School

Partner with KenInvest – Your Gateway to Investing in Kenya

#1 Source of Investment Data

Business Climate support

Investment Deal-room

EPZ and SEZ set up

Company Registration

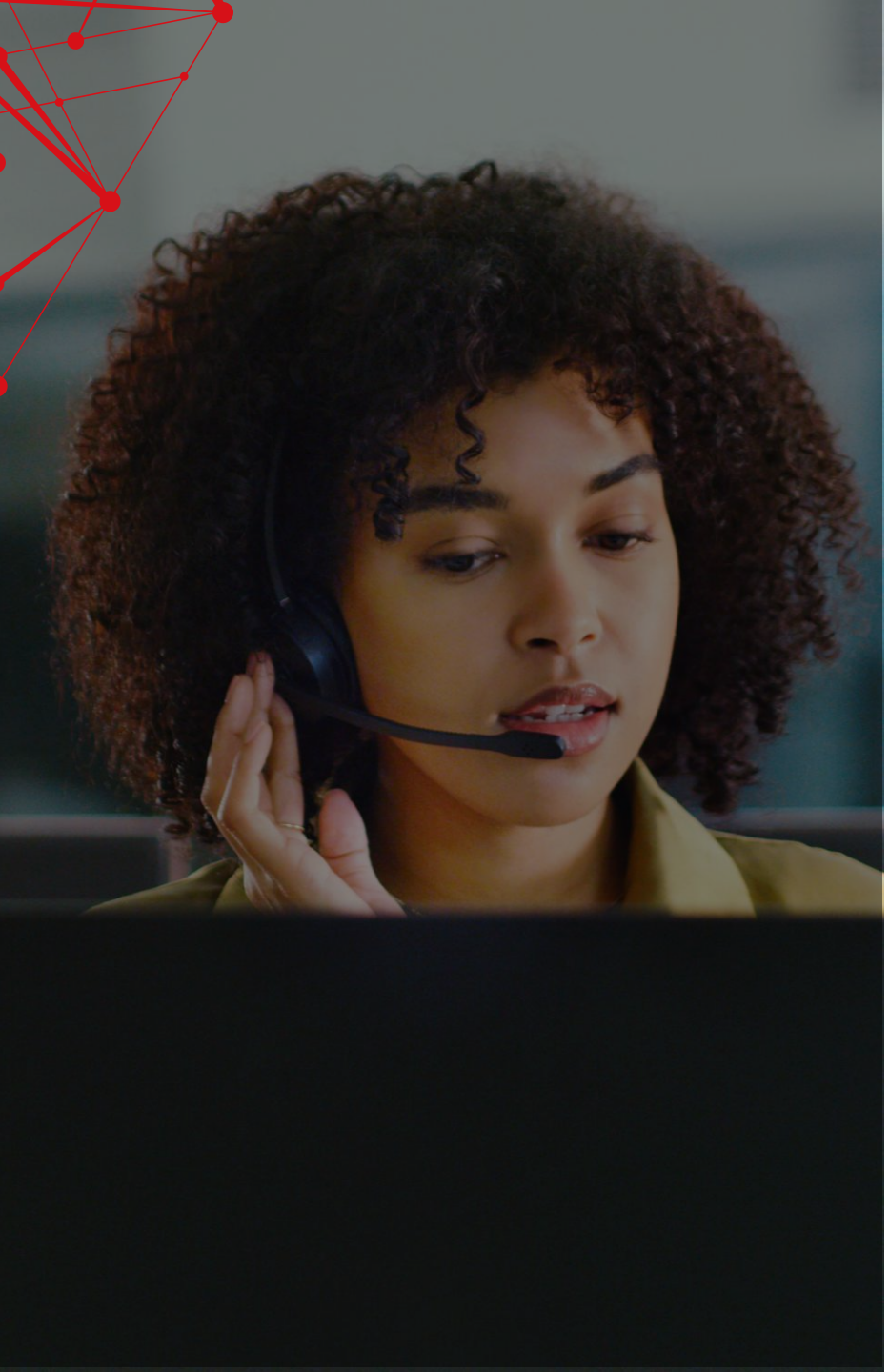
Access to Land and Power

Work Permits

Applicable Licenses

Kenya Investment Authority
15th floor, Old Mutual Tower, Upper Hill Road
Nairobi

Telephone: +254 (0) 730 104 200
Email: info@investkenya.go.ke



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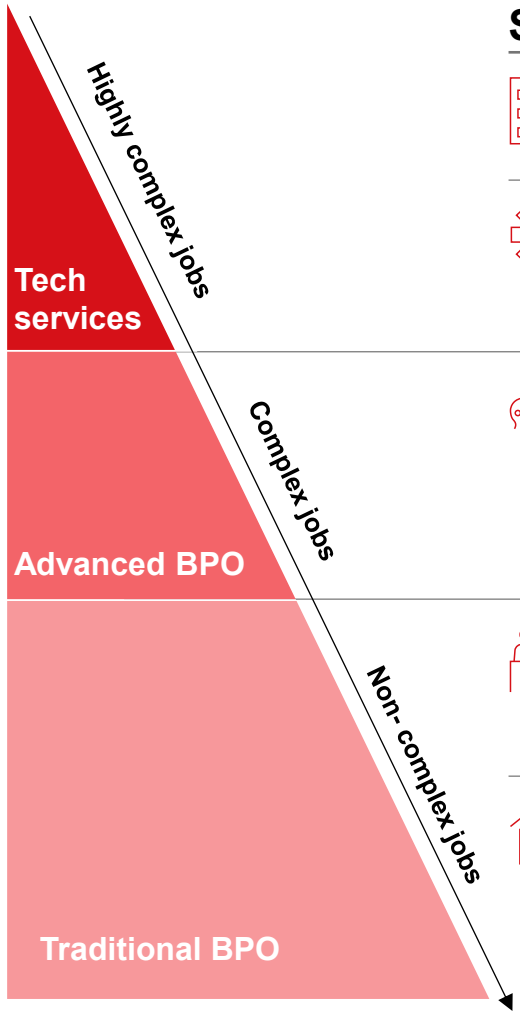
The BPO sector can be broken down into 6 broad segments

Sub-sector	Front-Office BPO	Back-Office BPO	Knowledge Process Outsourcing (KPO)	Information Technology Enabled Services (ITES)	Industry-Specific BPO Services	Other
Service lines	Customer Service and Support	Finance and Accounting	Data Analytics and Big Data Processing	IT Application Development & Maintenance	Banking, Financial Services & Insurance (BFSI)	IT/BPO Broadliners
	Sales and Marketing Outsourcing	Human Resources (HR) Outsourcing	Financial Analysis and Risk Management	Infrastructure Management & Cloud Services	Healthcare & Pharmaceuticals	Niche/Vertical Specialists
	Customer Relationship Management (CRM)	Procurement and Supply Chain Management	Legal Research and Intellectual Property	Software Testing & Quality Assurance	Retail & E-commerce	Captive Centers
		Administration and Legal Process Outsourcing (LPO)	Engineering Services	IT Helpdesk & Technical Support	Public Sector & Government	Freelancers & Gig Platforms
			Market Research and Business Intelligence	Data Management & Data Entry Services		
			Healthcare Services			

AI-Data Services are a cross-cutting opportunity featuring across the different BPO sub-sectors

Source: Gartner, Everest

Kenya offers opportunities in traditional and advanced BPO



Subsectors	Key service lines	Typical processes
Industry-specific	BFSI[1]	Loan processing, underwriting, claims management, etc.
ITES	Software Testing and QA, IT Help desk, Technical Support	Functional and performance testing, remote troubleshooting
Knowledge Process Outsourcing (KPO)	Market Research, Business Intelligence	Competitive analysis, consumer insights, etc.
	Data Analytics	Predictive analytics, data mining, reporting dashboards
Front office	Customer Service and Support, Sales, Marketing Outsourcing	Call centers, lead generation, digital marketing campaigns
Back office	Finance and Accounting	Accounts payable/receivable, payroll processing, tax filing, etc.
	HR Outsourcing	Recruitment, benefits management

Investment opportunities are found across **ITES and KPO**, **Front office**, and **cross-cutting AI-Data Services**[2], given a combination of **existing activity**, **potential for scale** and **value add**

- Traditional BPO will be easily **scalable**
- Advanced BPO with existing activity provides **high value-add opportunities**, although more **difficult to scale**

1 Banking, Financial Services, and Insurance
2 Not a standalone sub-sector, but regarded as a cross-cutting opportunity as AI-Data services may be leveraged across various subsectors
Source: Gartner, experts input

Kenya has a strong ecosystem of BPO operators, clients, and digital infrastructure providers

Major BPO operators in Kenya

CCI KENYA, Teleperformance, tana, cloudfactory, CODEPATH*, DDD Digital Divide Data, C&R Group Experience Our Expertise, Ecom Services Ltd. Managing outsourced processes for ecommerce companies., fusion communication systems, Geoffrey Gitau & Co. Certified Public Accountants, HORIZON contact centers Innovation & Excellence, ICX, iDEON Business Outsourcing Solutions, iSON xperiences, marketforce, MILLER AND COMPANY, mgk OUTSOURCING LIMITED, odoo, ctopus, The People Edge Consulting, sama, SEMICONDUCTOR TECHNOLOGIES LIMITED, SOFTWARE GROUP, summit Recruitment & Search AFRICA, TECHNO BRAIN inspiring solutions..., TeleSky Digital Country, Tech Mahindra, adept TECHNOLOGIES, AMPERSAND, BASi RESEARCH PRODUCTS

Major clients and brands served in Kenya

BARCLAYS, pwc, Microsoft, mastercard, citi, Deloitte., Google, HCM Metrics, IBM, intel, ISUZU, jetBlue, cisco, BEING HUMAN GROUP, M-PESA, NEWS CAFE, ORACLE, PRIME, ramco, MOTOROLA, simplifydigital, American Airlines, TotalEnergies, TOYOTA, OLDMUTUAL, VISA

Digital infrastructure providers in Kenya[1]

SEACOM, STARLINK, JTL Jamii Telecom Your Trusted Business Partner, WIOCC Africa's Digital Backbone, THE EAST AFRICAN MARINE SYSTEM LTD, LIQUID INTELLIGENT TECHNOLOGIES, Safaricom

1 Including internet service providers and fibre optic operators

Source: 2024 Africa GBS Benchmarking and Market Data Bank; GBS World | Genesis GBS

Kenya’s value proposition for investors

Kenya is a gateway to Africa and beyond

Country snapshot

- **~55M** population
- **~$132B** GDP[1]
- **~5%** average annual GDP growth[2]
- Official languages: English and Swahili
- Vast access to regional and global markets (**43** BTA[3], **14** DTA[4] in force)

		Market GDP	Population
Pan-African market access	EAC	~$0.3T	331M
	COMESA	~$1T	640M
	TFTA	~$1.8T	800M
	AfCFTA	~$3.4T	1,300M
Inter-continental trade agreements	AGOA	~$27T	340M
	EPA	~$19T	448M
	FTA	~$3.3T	68M
	CEPA	~$0.5T	10.5M

1.GDP current prices, 2025 outlook by the IMF
2.Average GDP growth (annual %), between 2019-2023 (World Bank Group)
3.Bilateral trade agreements
4.Double tax agreements

Source: World Bank Group, IMF, International Trade Administration, COMESA, EAC, AGOA, Europa, Kenya State Department for Trade

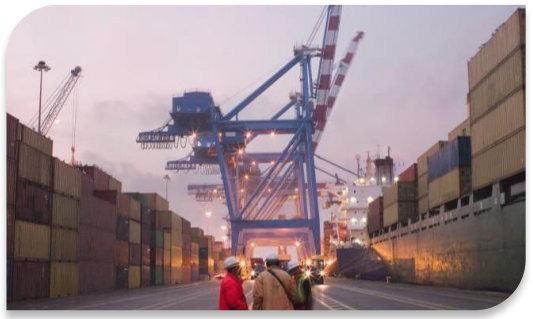
Kenya offers investors a variety of opportunities

Stable economy and leading vibrant democracy

6th largest economy in Africa

Leading Africa's green transition

~93% renewable energy[1] at competitive rates



Logistics and innovation hub of the region

4 international airports

2 seaports

Young, trainable, and productive workforce

>80% literacy rate

Robust digital and tech ecosystem aligned with EU regulations

50+ active tech hubs countrywide

Incentives for investment and investor protection

100% repatriation of profits or interests

1. Based on national generation data by energy source as of June 20-22, 2025; as reported by EPRA

Note: As of July 2025

Source: IMF 2024, Kenya Ports Authority 2025, Genesis Analytics 2024, KenGen, World Bank 2023, Kenya Investment Authority 2025; EPRA

Kenya has received endorsements

Ranking in Africa

Kenya is rated…

Number 1

- Greatest investment momentum in Africa in 2024[1]
- Funding to start-ups in Africa (~ $638M in 2024)[2]
- Greenfield projects in East Africa in 2023[3]

Number 3

- On Ease of Doing Business in sub-Saharan Africa[4]
- Women's financial and economic inclusion in Africa[5]

Number 13

- Fastest-growing economy in Africa in 2023[6]

Note: As of July 2025

1. fDi Intelligence 2024 2. Africa: The Big Deal Report 2024 3. UNCTAD 4. World Bank 2020 2023 5. African Center for Economic Transformation 6. World Bank 2023

Kenya operates 140+ economic zones with incentives for investors

44
Gazetted Special Economic Zones (SEZs)

9,042
Acres of land available to lease in SEZs

105
Gazetted Export Processing Zones (EPZs)

6,177
Acres of land available in EPZs

Investor incentives within SEZs and EPZs

- **Exemption from excise duty, import duty**, and import declaration fees[1]
- **Under SEZs: 10%** corporate tax in the first 10 years; **15%** in the next 10 years; **30%** in subsequent years
- **Under EPZs: 10-year corporate tax holiday**, 25% for the subsequent 10 years and 30% thereafter
- **Exemption from advertisement** and **business service permit fees**
- **100% allowance on capital expenditure** on building and machinery
- **Withholding tax exemption** on dividends and gains on transfer of property[2]
- Stamp duty exemption on legal instruments

Nairobi International Financial Centre (NIFC) also offers incentives

Regulatory flexibility and fast-tracking

Reduced corporate tax rate of 15% for 10 years

Incentives for green bonds, REITs, and infrastructure bonds, including tax exemptions or lower tax rates

1. For EPZs, this applies to exemption from import duty and VAT applies to raw materials and machinery
2. For EPZs, this is a 10-year tax holiday

Source: SEZA, EPZA, Kenya Investment Incentive package

Kenya offers a multitude of public SEZs, EPZs and industrial parks

Example parks[1]

1

Konza Technopolis

Machakos

5,000 acres

Borders 3 counties (Makueni, Machakos and Kajiado). 60 Km from Nairobi

2

Dongo Kundu SEZ

Mombasa

3,000 acres

Adjacent to the Mombasa Port in Likoni

3

Naivasha SEZ

Naivasha

1,000 acres

Located in Maai Mahiu along the Nairobi-Naivasha SGR line
Competitive power tariffs
Planned 5,000-acre expansion

4

Olkaria SEZ

Nakuru

8,292 acres

Leverages geothermal power and hosts KenGen's Green Energy Park

5

Riwa SEZ

Homa Bay

530 acres

13 Km from the CBD
8 industrial, sector-based zones planned

18,000 acres of public SEZ and industrial park land
18 CAIPs in development and 30 more planned

1. At different stages of development (e.g., Konza Technopolis is operational, Dongo and Naivasha are under construction)

Source: SEZA, EPZA

Private SEZs and industrial parks are also available in Kenya

Example parks[1]

1

Two Rivers Financial Center

Nairobi

64 acres

Access to international markets for global, regional, and Kenyan service-oriented business enterprises

2

Mount Kipipiri Golf and Resort

Nyandarua

1,478 acres

Megaproject in Kipipiri, Nyandarua

3

Tatu City

Kiambu

5,000 acres

Mixed-use special economic zone

4

Northlands SEZ

Kiambu

528 acres

Private SEZ located in Ruiru, Kiambu County

5

Infinity IP

Nairobi

200 acres

Private IP for SMEs located 10 km from Jomo Kenyatta International Airport and 20 km from Nairobi's City Center

6

Vipingo SEZ

Kilifi

2,000 acres

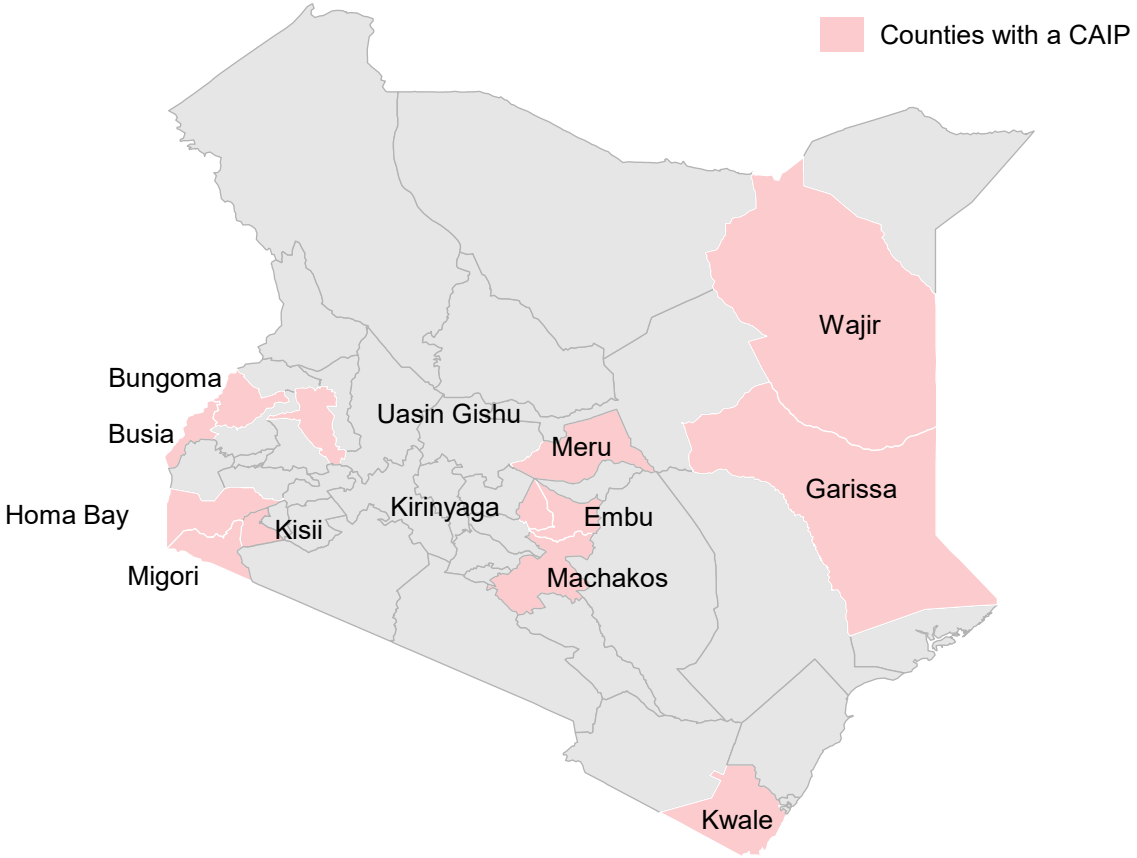
Plug-and-play industrial park in Kilifi County focused on green energy solutions

1. At different stages of development (e.g., Two Rivers Financial Center, Tatu City are operational, Mount Kipipiri is under construction)

Source: SEZA, EPZA

Incentives within County Aggregation and Industrial Parks (CAIPS)

13 County Aggregation and Industrial Parks (CAIPs)[1]



Incentives within CAIPs match offerings from landbanks

- SEZs
- EPZs
- Industrial parks

1. To be completed by December 2025

Source: SEZA, EPZA, Ministry of Investments, Trade and Industry

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