

Investment opportunities in Kenya for Business Process Outsourcing (BPO)

Acknowledgements



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

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 Outsourcing (KPO) 

Front-Office BPO 

AI-Data Services 

Other

Back-Office BPO 

Industry-Specific BPO Services 

Other services 

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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

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



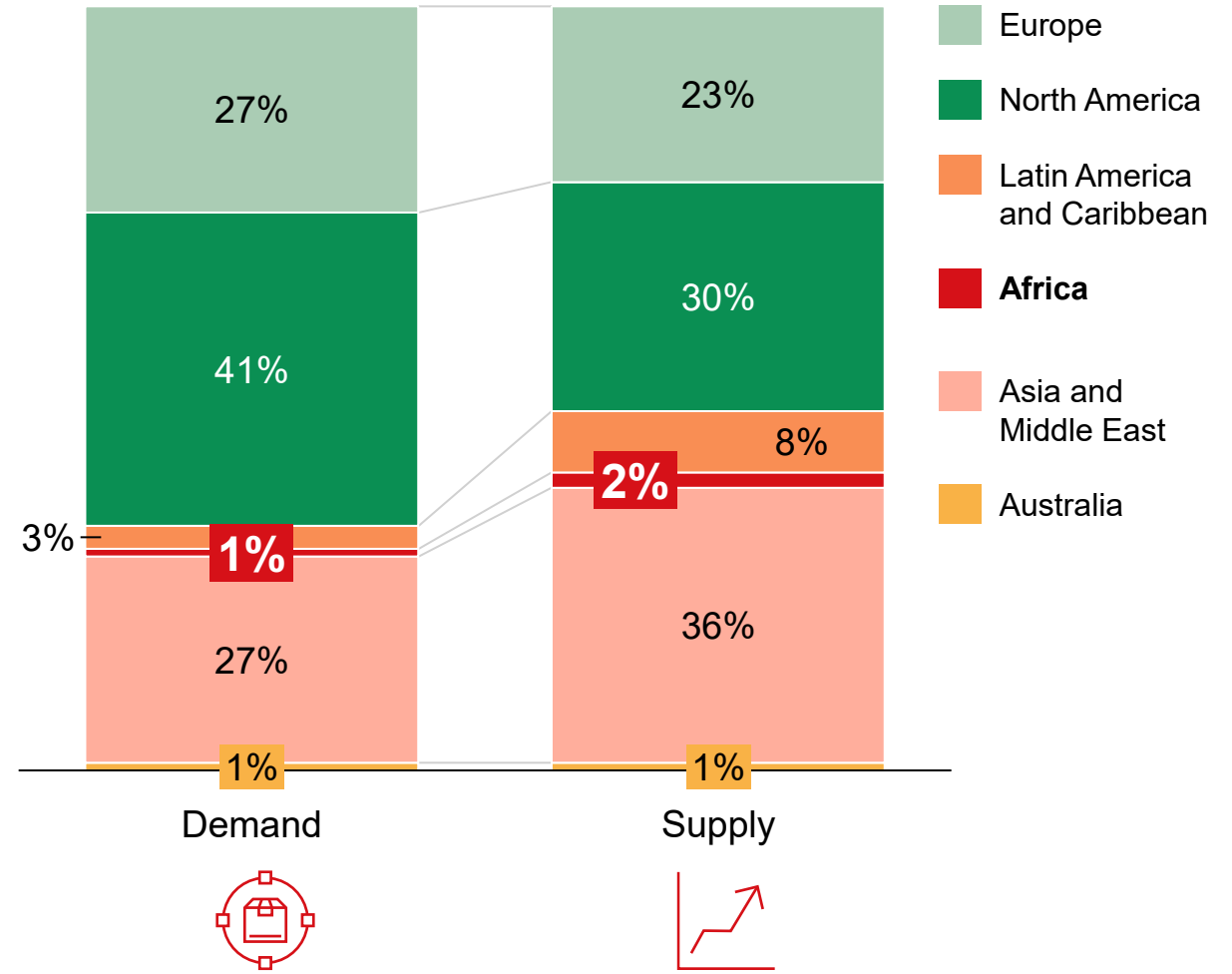
~\$1.3Tn
Estimated global demand for 2023



8.2%
Projected annual growth (CAGR) between 2023 and 2030



43Mn
GBS workforce in 2023¹



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

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Key market¹ and size



\$254 Bn

India

Key characteristics and growth drivers

Transitioned from back-office operations to offering high-value services, with **IT-Enabled Services**, including **software and advanced IT** leading², driven largely by a strong **IT industry backbone** and **government support** (e.g., STPI³)



\$37.9 Bn

Philippines

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)



\$2.9 Bn

South Africa

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

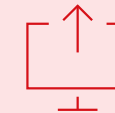


Key trends



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

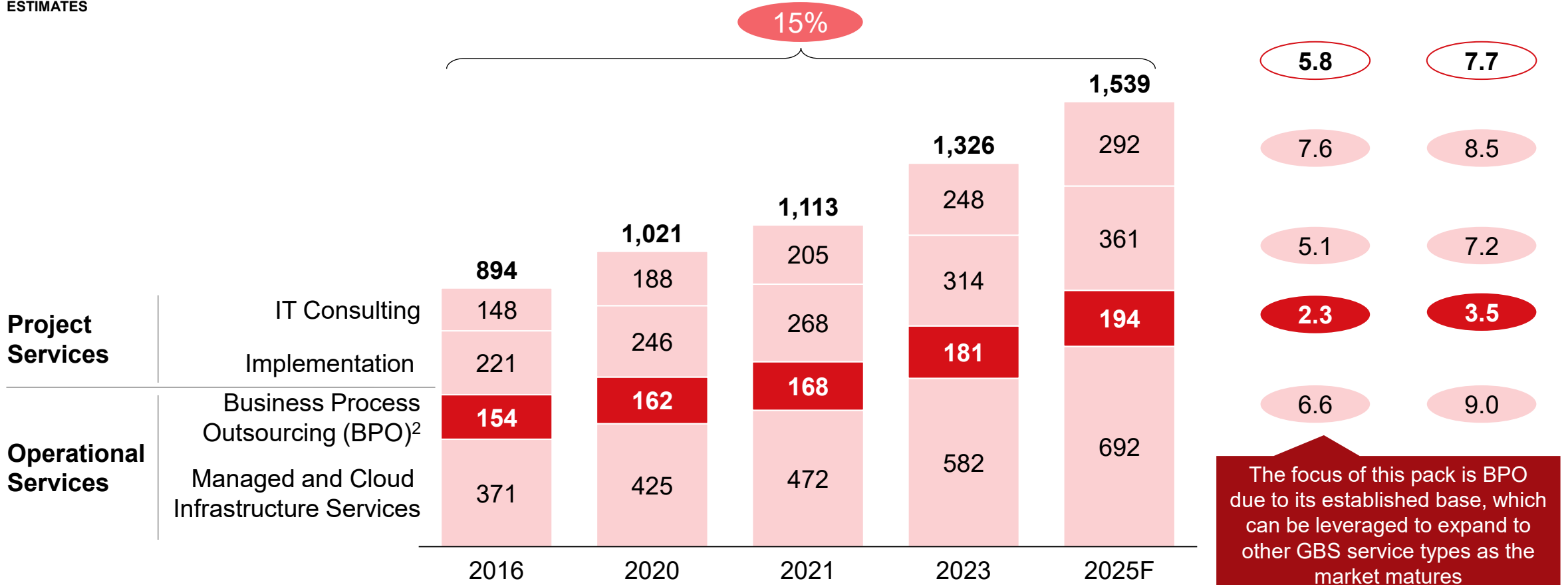


xx% BPO share of GBS xx BPO

CAGR
2016-23, % **CAGR**
2023-25, %

GBS end-user spend by service type¹, Bn \$

ESTIMATES



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



Decline in traditional BPO models with increased adoption of digital-driven services for front and back-office operations

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

Increasing customer demands as the digital CX market grows leading a shift to at-distance operating models to meet demand

Africa's opportunity to address these challenges



> **Abundance of young, educated, digitally native talent** as over 12 million African youth enter the job market annually

> **Cost competitiveness against mature markets** with labor costs in Kenya 60-70% lower than in America, Europe and Australia

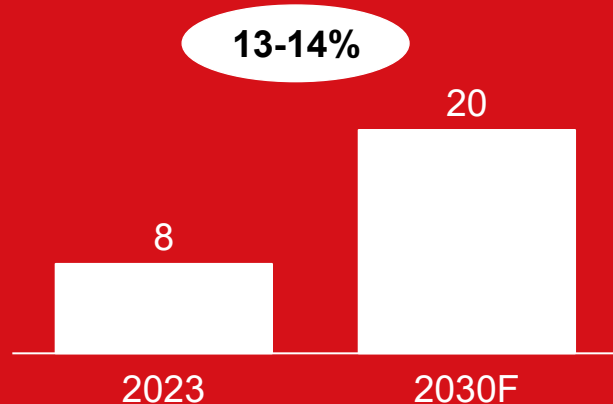
> **Improving digital infrastructure and growing tech ecosystems** to support the delivery of IT enabled services

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 examples¹

BPO market size in Africa, Bn \$, CAGR²

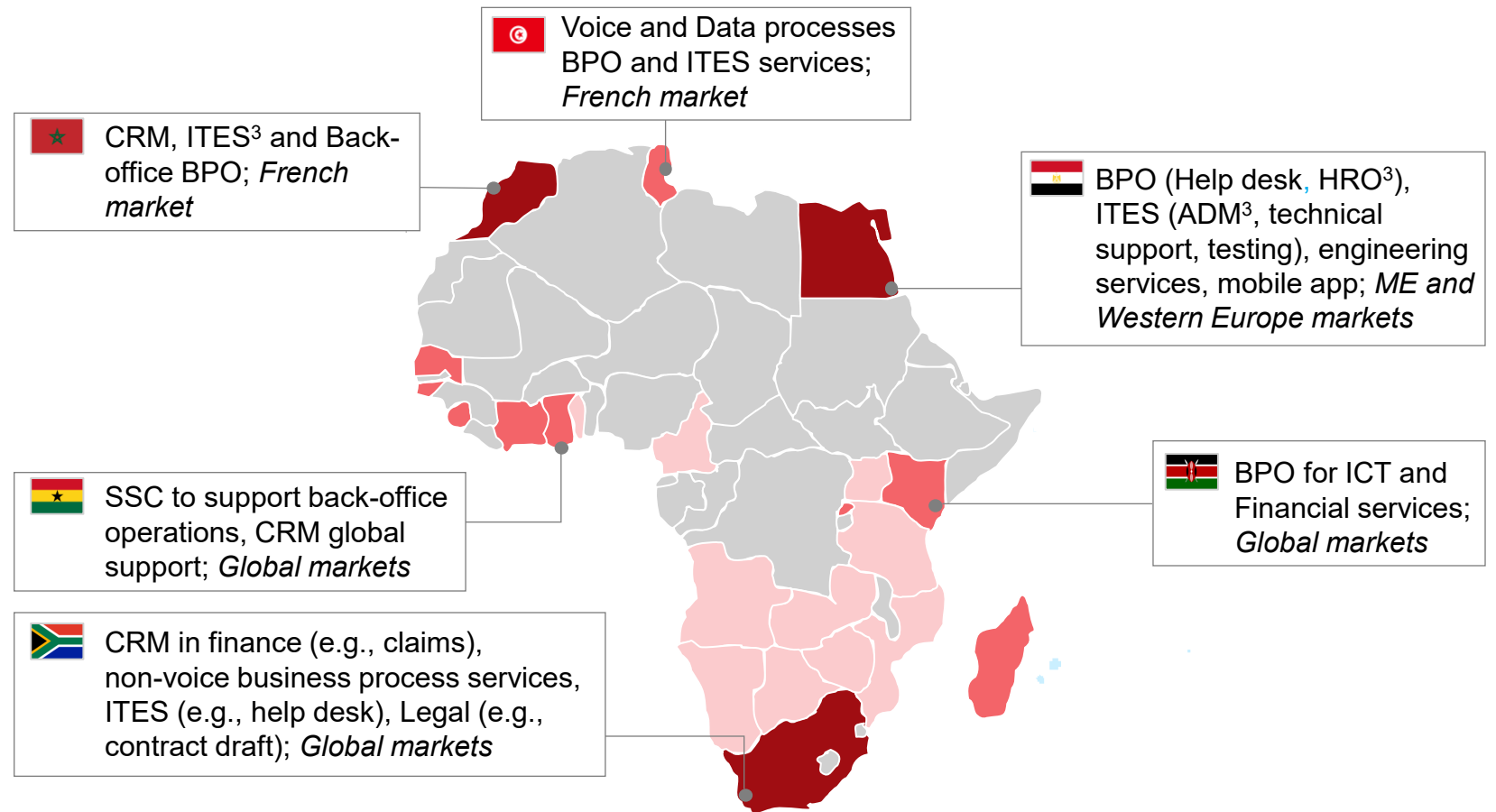
Market growth in Africa is expected to be higher than global average growth of 4%



1.1Mn

employed as of 2023

X CAGR Hub: ■ Main outsourcing ■ Growing ■ Nascent



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

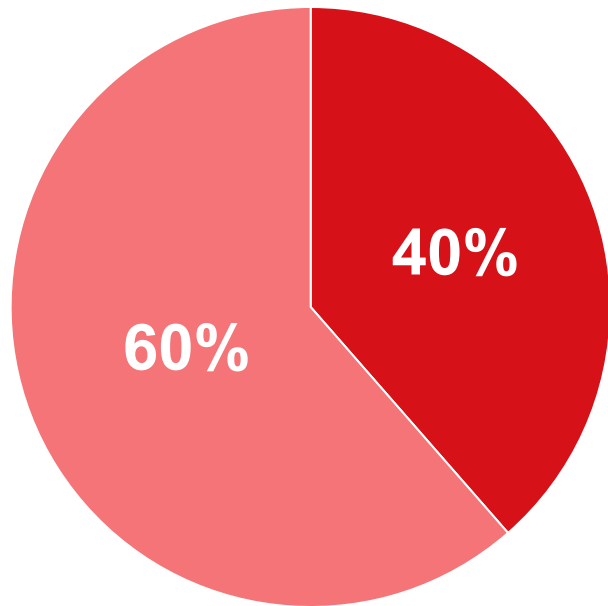
Source: Country's ministries, expert interviews, Everest Group, Elix IRR

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 BPO¹ market, 2025, \$ Mn

■ BPO ■ Other GBS



Total GBS ~\$700

Key service categories in Kenya



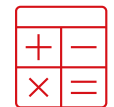
Customer management



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 market⁴

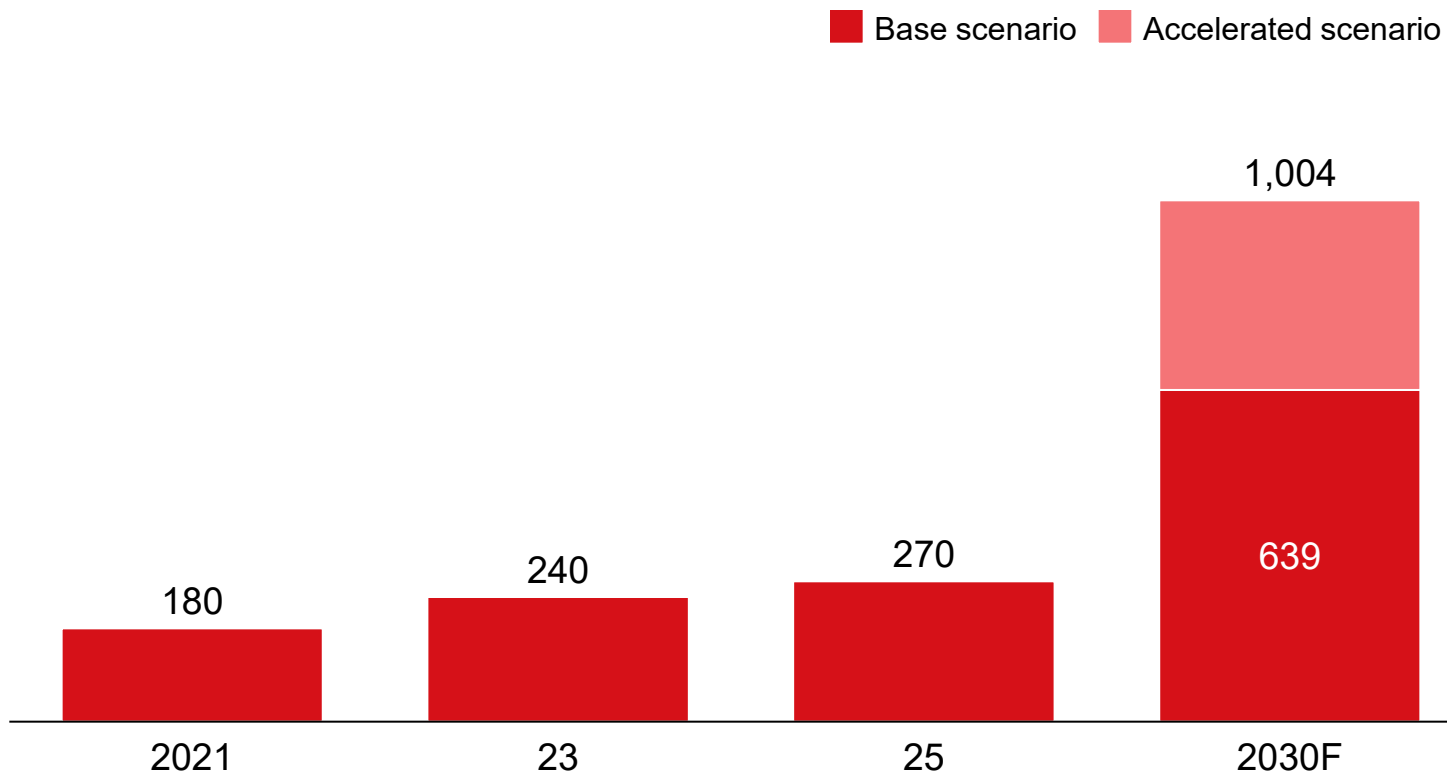


~36K

Kenya's estimated GBS workforce (2025)

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

Kenya's BPO sector growth¹, 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



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Kenya's competitive advantage sets it apart for BPO services

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Details follow

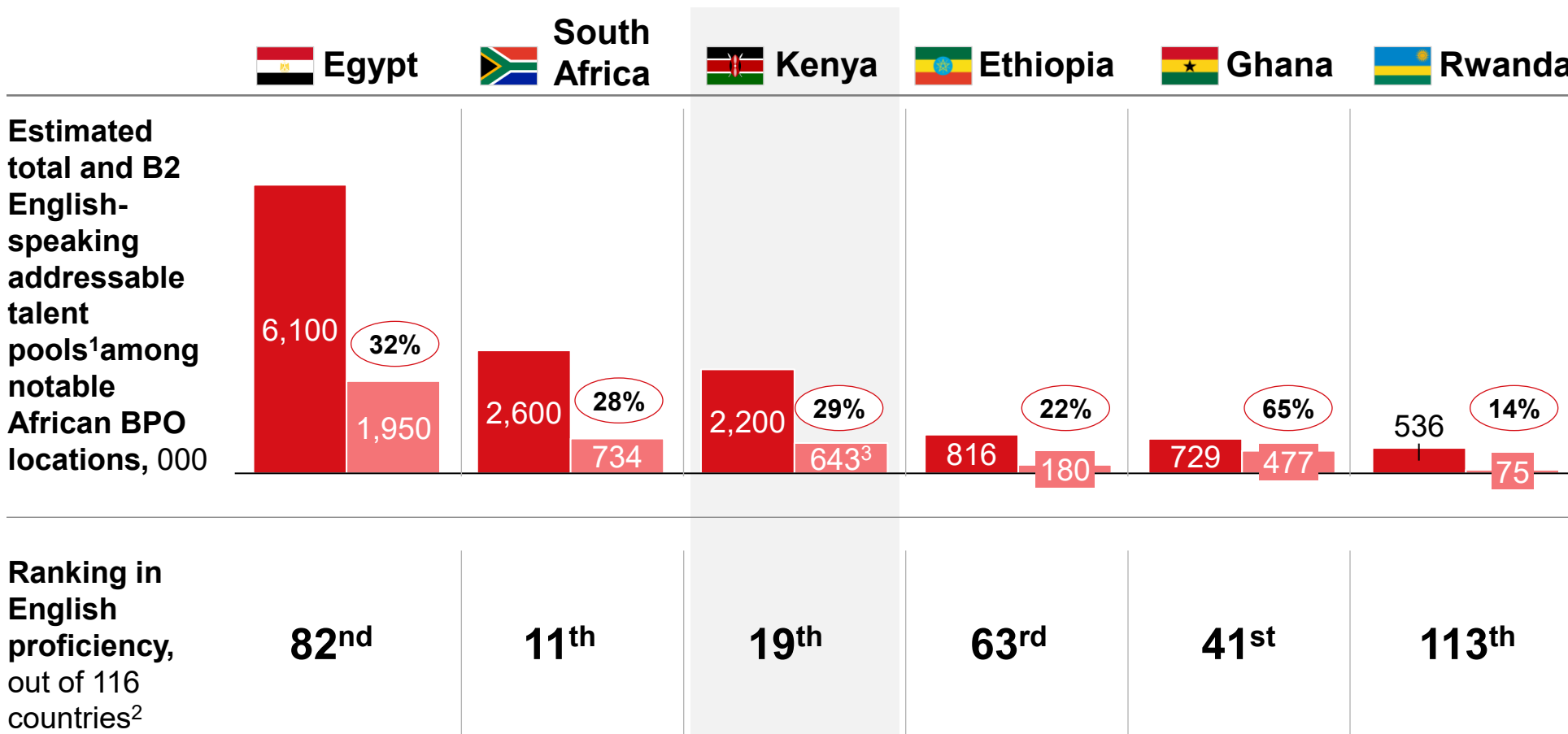


¹ Between 18 and 35 years old

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

XX B2 proficient as a % of total addressable market ■ Total addressable talent pool ■ B2 English-speaking Talent Pool



Kenya has a pool³ 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

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

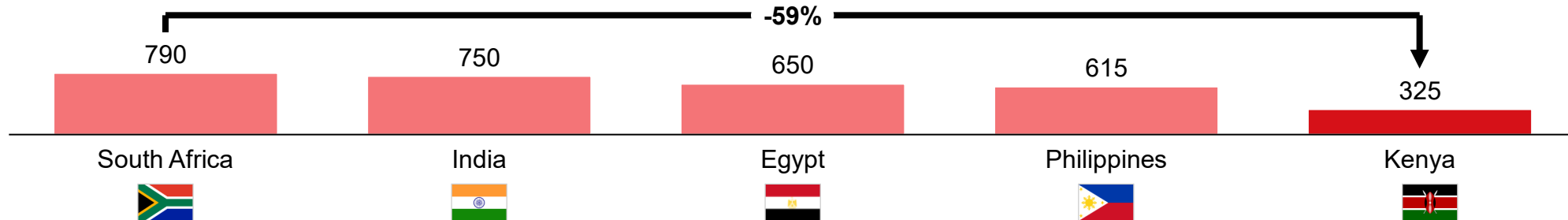


↘ Gap between peer leader and Kenya

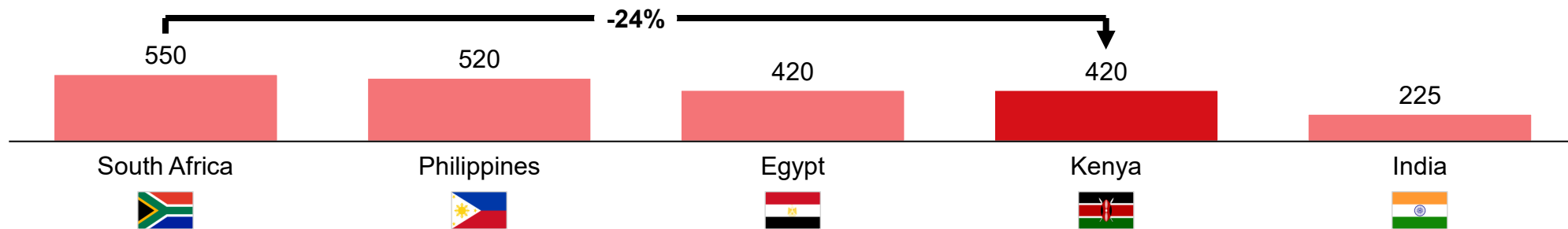
Employee

Average monthly salary, \$

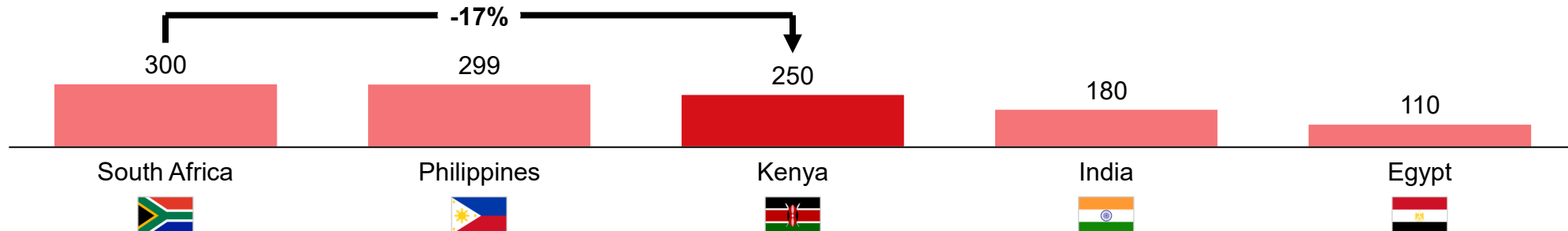
Team leader



Supervisor



Agent



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

											Peer average	
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

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

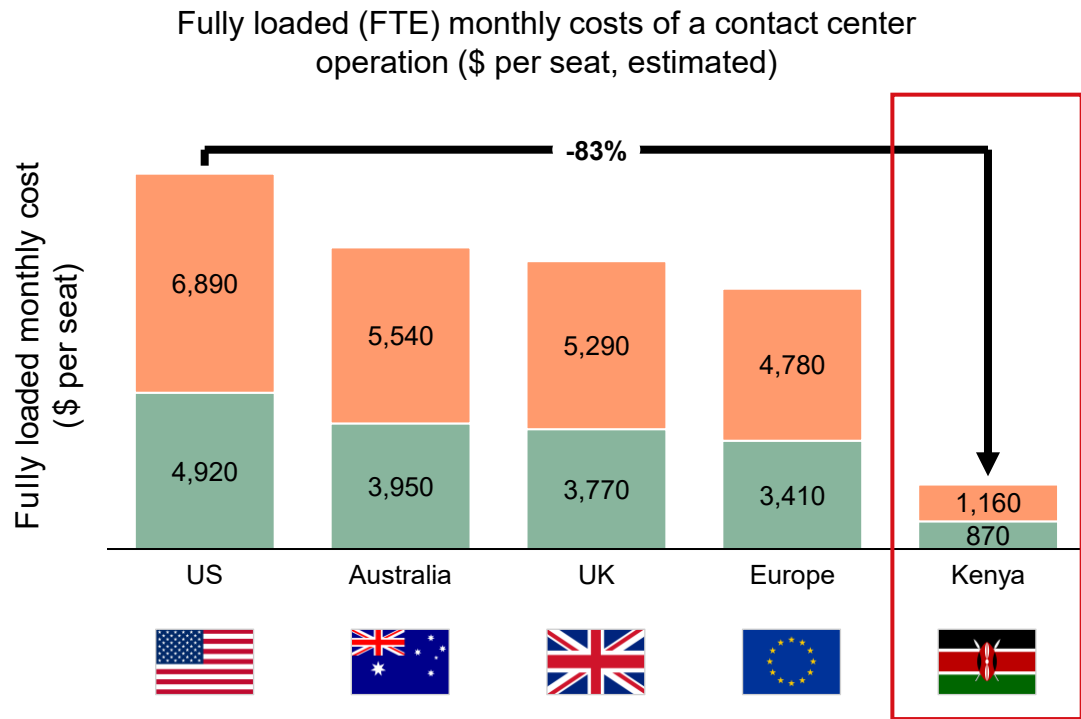


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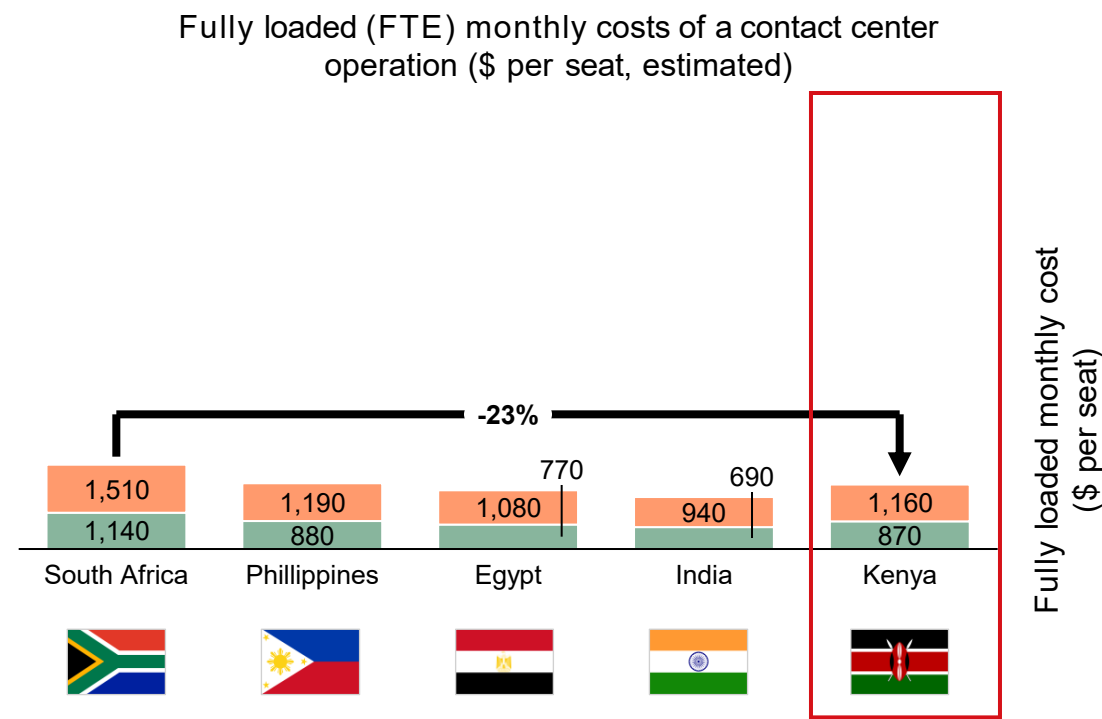
Minimum Maximum

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 economies¹



FTE Competitor Market contact center monthly costs comparison vs. emerging markets²



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

Cultural compatibility



- Shared business etiquette
- Alignment with western values
- Fluent English communication

Regional Access



Gateway to East African markets, and other markets through the AfCFTA¹

331Mn+

East African population

Cross-border logistics hub

Global business appeal

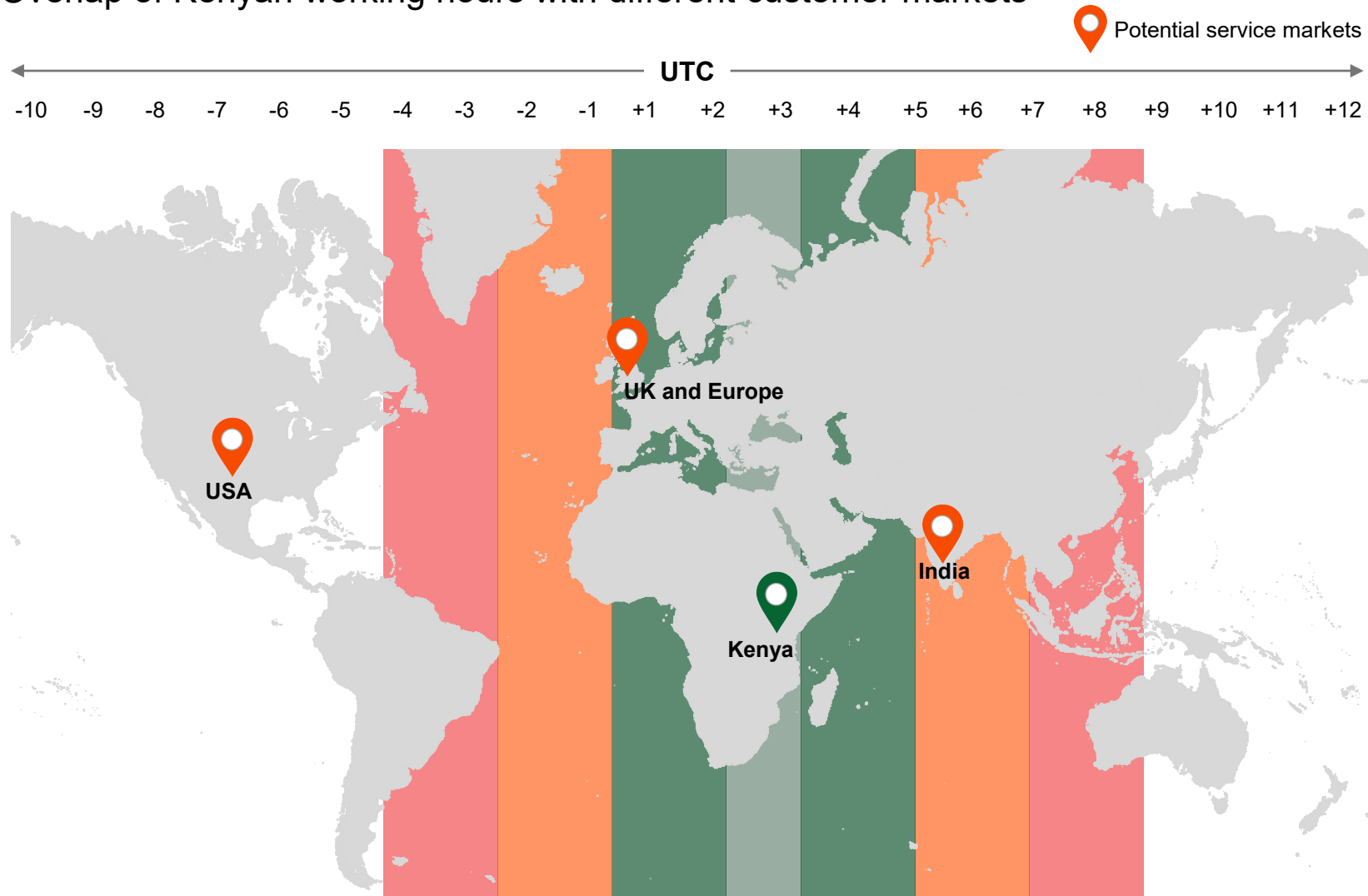


- Preferred hub for global outsourcing
- Trusted by international brands
- Diverse portfolio of services

1. African Continental Free Trade Area

And its strategic time zone enables service to diverse markets

Overlap of Kenyan working hours with different customer markets



- >75% overlap in working hours¹
- >50% overlap in working hours¹
- >25% overlap in working hours¹

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



Internet connectivity

1.5M+ internet subscriptions

6 undersea cables

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

Sample players



Investment and funding

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

Sample players



1. 70 million active SIM subscriptions

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



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**

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**

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



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**



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Investment potential exists across 3 BPO sub-sectors in Kenya

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	1	2	3
	ITES¹ and Knowledge Process Outsourcing (KPO)	Front office	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	 	 	
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

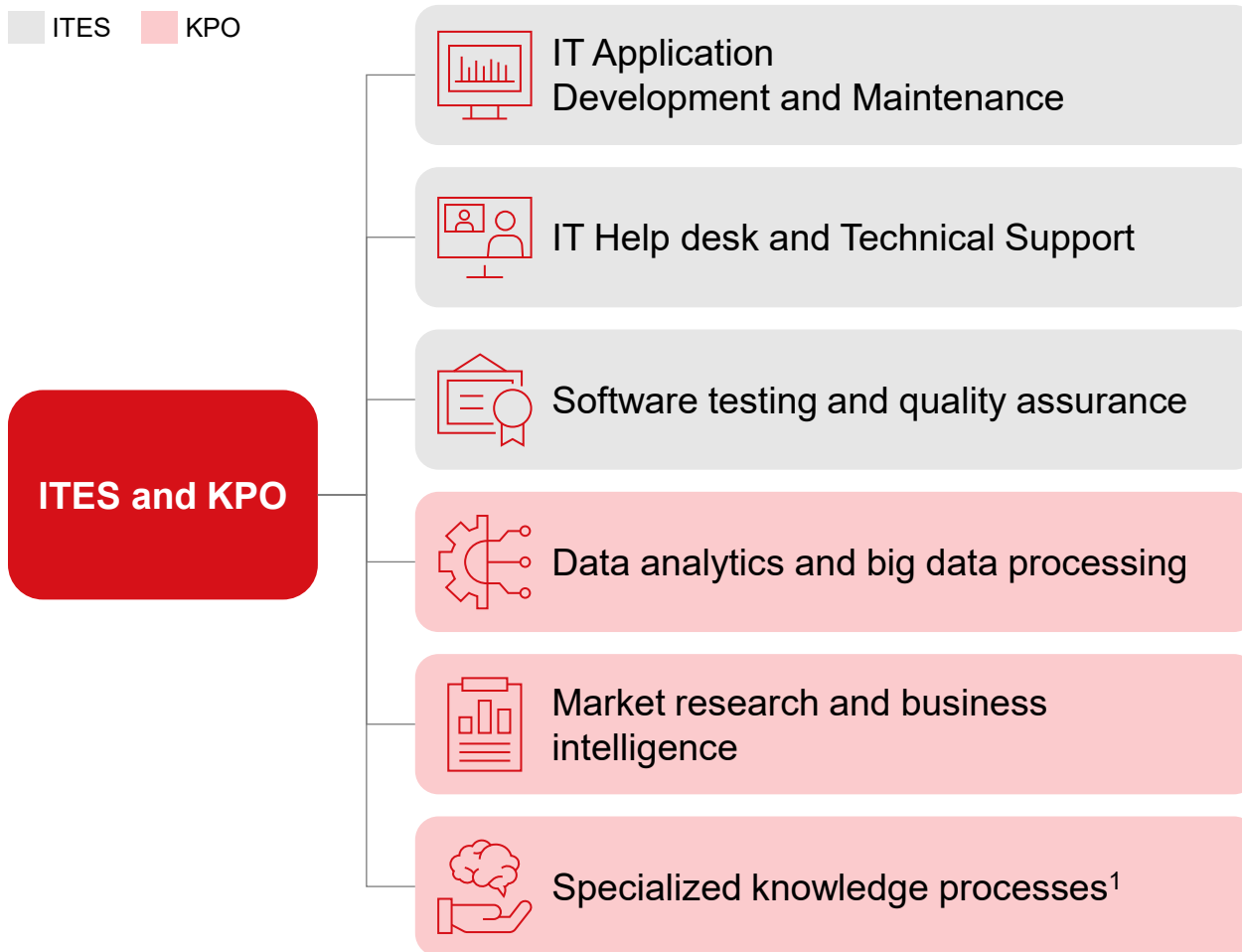
Source: Expert input

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 monthly salaries in Kenya, \$



Key competitive advantages in ITES and KPO

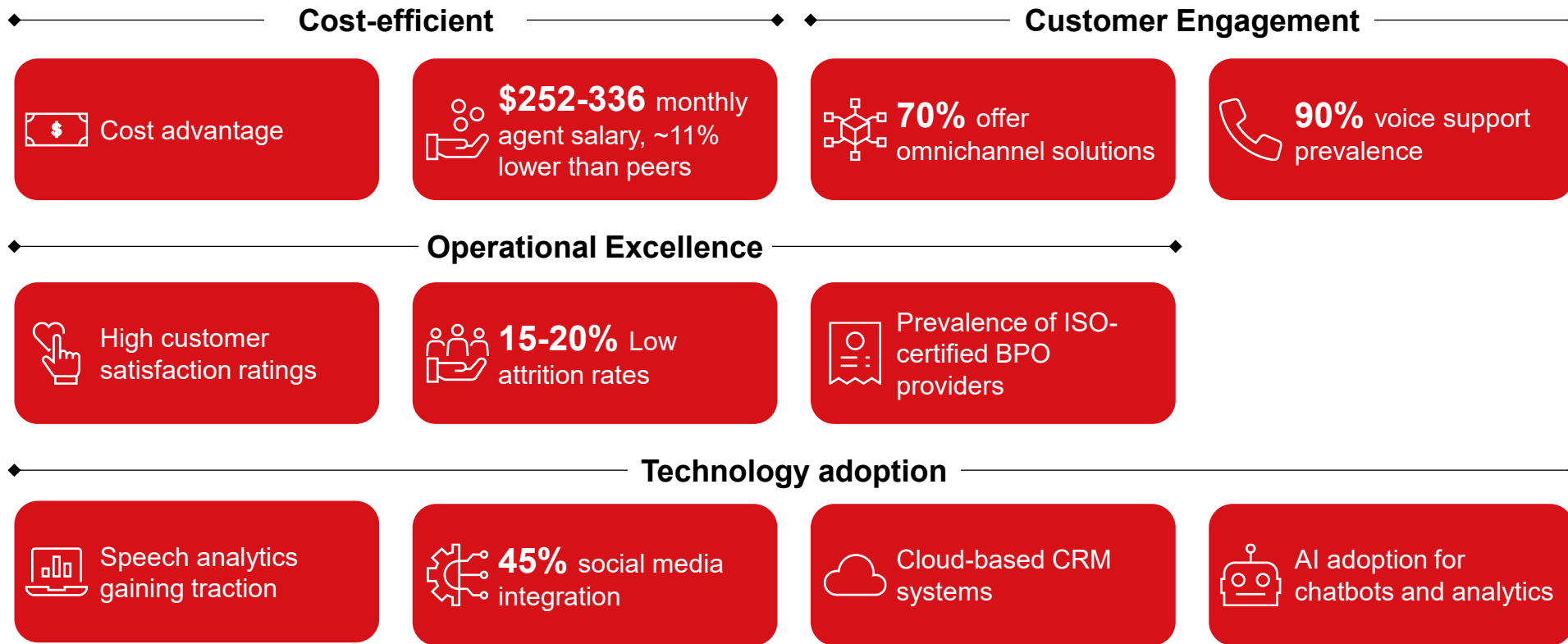
Digital skills pipeline	Kenya produces 10K+ ICT graduates per year , with many trained in data annotation and IT support
Rising analytics talent	Universities and bootcamps producing data scientists and analysts, e.g., Moringa School
Regional innovation hub	Nairobi hosts Microsoft and Google innovation centers, and an IBM research lab



¹ e.g., legal, engineering, healthcare, and financial services
² South Africa

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

◆ XXX ◆ Competitive advantage



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



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



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



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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 GDPR¹, 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



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



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



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 abroad¹



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)



 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

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

Progress Kenya has made so far in cybersecurity

#21 Kenya's global ranking in the ITU's Global Cybersecurity Index (2024), and a **Top 5 ranking in Africa**

2.5B Cybersecurity threats detected between January and March 2025 by Kenya's National Kenya Computer Incident Response Team – Coordination Centre¹, with **13 million threat alerts issued**

200+ Current members of the **Kenya Cybersecurity and Forensics Association**



Strategic focus of the Draft Kenya Cybersecurity Strategy (2025-2029)

Enhanced **regulations and policies**, strengthening institutional framework for cybersecurity governance with **clear leadership and accountability**

Proactive incident identification, mitigation, response, and management to **enhance protection and resilience of critical information infrastructure**

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**

B. Economic zones offer incentives and infrastructure support to investors

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



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



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



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

BPO operators can **establish operations in Export Processing Zones¹** nationwide, benefiting from **flexibility to gazette individual buildings as EPZs**, enabling expansion to areas like Kisumu, Mombasa, and Nyeri

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

2008 2009 2022 2024 2025 2026

Kenya Vision 2030:
Supports tech and innovation hubs¹



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

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

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

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

National Policy on BPO³: 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**.

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](#)

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

Public sector program

Initiative	Partners	Description
		<p>GoK launched Ajira Digital Program in 2016 to equip over 1Mn youth with digital skills every year</p> <p>Over 109,000 youth have been linked to digital jobs through the program, with about 336,000 undergoing digital training</p>
<p>Kenya National Digital Literacy Skills Curriculum</p>		<p>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</p>
		<p>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</p>
		<p>Institutions offering diverse training programs across topics including data analytics, cybersecurity, AI, and digital skills</p>



Get started today!

Meet our sector expert...

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the rest of our
management
team



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management/](https://www.investkenya.go.ke/management/)



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#1 Source of
Investment Data

Business
Climate support

Investment
Deal-room

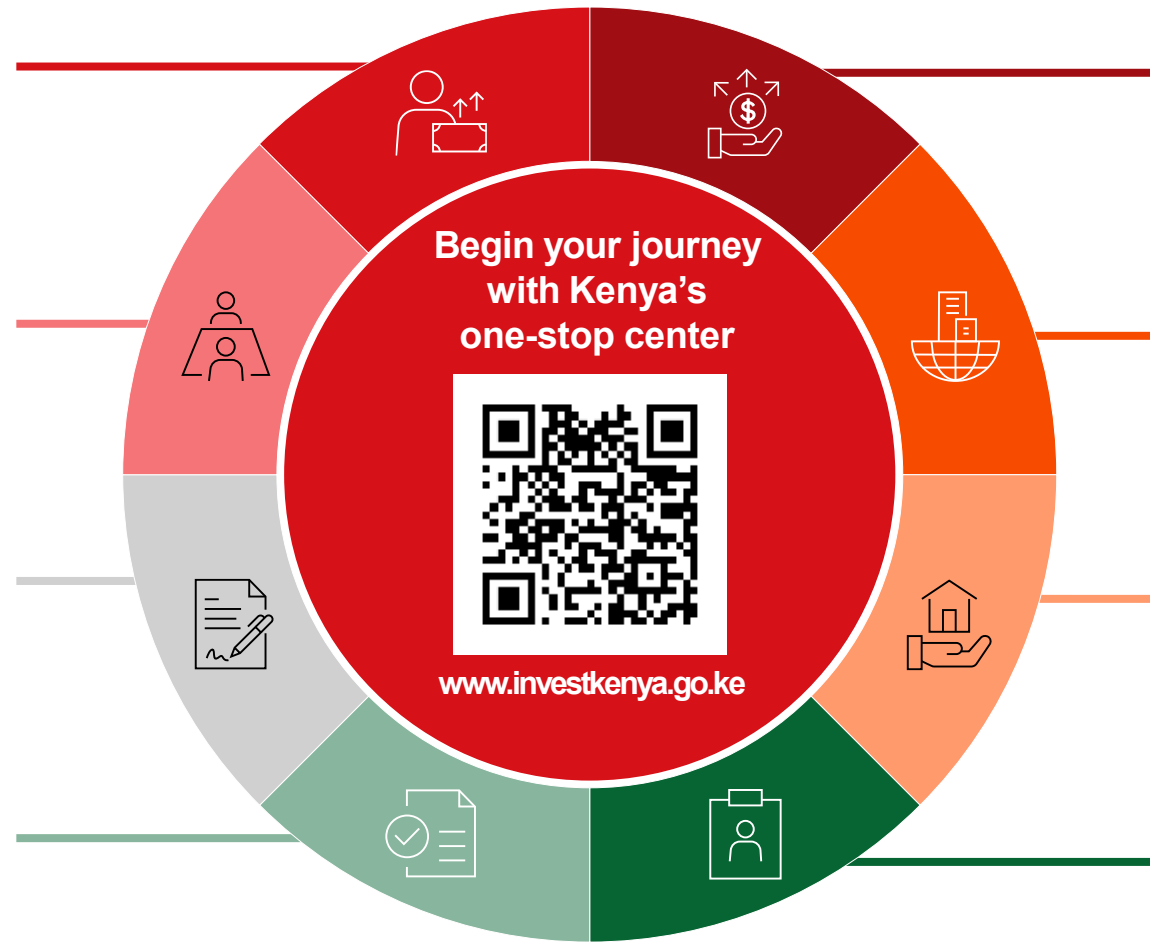
EPZ and SEZ
set up

Company
Registration

Access to Land
and Power

Work Permits

Applicable
Licenses



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

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

Kenya offers opportunities in traditional and advanced BPO

	Subsectors	Key service lines	Typical processes
Tech services Highly complex jobs	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
Advanced BPO Complex jobs	Knowledge Process Outsourcing (KPO)	Market Research, Business Intelligence Data Analytics	Competitive analysis, consumer insights, etc. Predictive analytics, data mining, reporting dashboards
	Front office	Customer Service and Support, Sales, Marketing Outsourcing	Call centers, lead generation, digital marketing campaigns
Traditional BPO Non-complex jobs	Back office	Finance and Accounting HR Outsourcing	Accounts payable/receivable, payroll processing, tax filing, etc. Recruitment, benefits management

Investment opportunities are found across **ITES and KPO, Front office, and cross-cutting AI-Data Services²**, 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



Major clients and brands served in Kenya



Digital infrastructure providers in Kenya¹



1. Including internet service providers and fibre optic operators

Kenya's value proposition for investors



Kenya is a gateway to Africa and beyond

Country snapshot

~**55M** population

~**\$136B** GDP¹

~**5%** average annual GDP growth²

Official languages: English and Swahili





Vast access to regional and global markets
(**43** BTA³, **14** DTA⁴ 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

Kenya offers investors a variety of opportunities



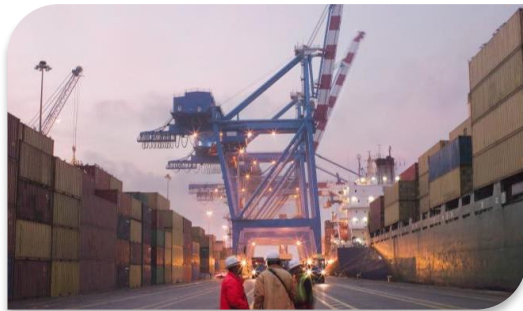
Stable economy and leading vibrant democracy

6th largest economy in Africa



Leading Africa's green transition

~93% renewable energy¹ 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

Kenya is rated...

Number 1



Greatest investment momentum in Africa in 2024¹

Number 3



On Ease of Doing Business in sub-Saharan Africa⁴

Kenya has received endorsements

Ranking in Africa



Funding to start-ups in Africa (~ \$638M in 2024)²



Women's financial and economic inclusion in Africa⁵



Greenfield projects in East Africa in 2023³



Fastest-growing economy in Africa in 2023⁶

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 fees¹**
- **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 property²**
- **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 parks¹



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)

Private SEZs and industrial parks are also available in Kenya

Example parks¹

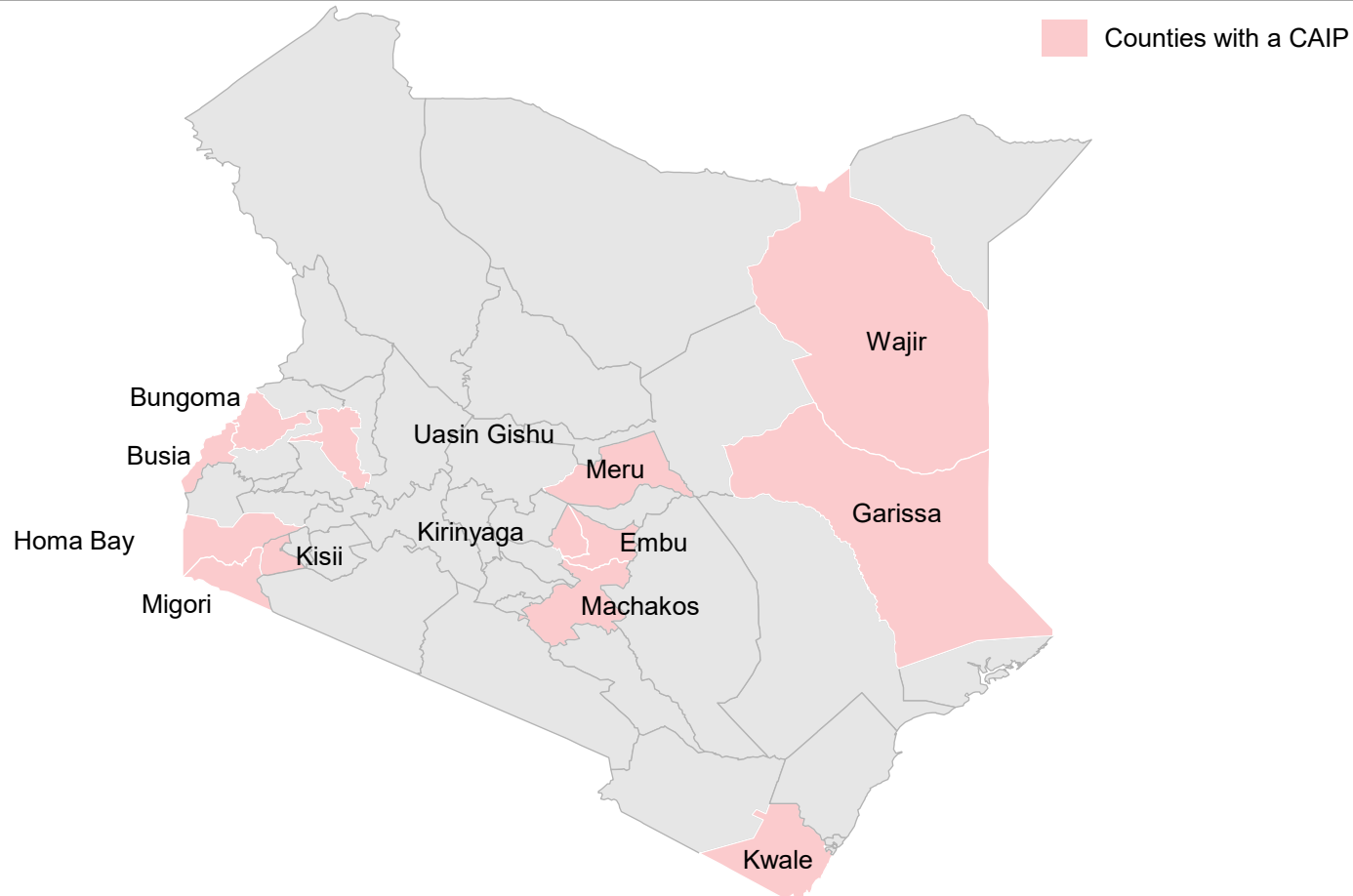


<p>1</p> <p>Two Rivers Financial Center Nairobi</p>	<p>2</p> <p>Mount Kipipiri Golf and Resort Nyandarua</p>	<p>3</p> <p>Tatu City Kiambu</p>	<p>4</p> <p>Northlands SEZ Kiambu</p>	<p>5</p> <p>Infinity IP Nairobi</p>	<p>6</p> <p>Vipingo SEZ Kilifi</p>
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<p>64 acres</p> <p>Access to international markets for global, regional, and Kenyan service-oriented business enterprises</p>	<p>1,478 acres</p> <p>Megaproject in Kipipiri, Nyandarua</p>	<p>5,000 acres</p> <p>Mixed-use special economic zone</p>	<p>528 acres</p> <p>Private SEZ located in Ruiru, Kiambu County</p>	<p>200 acres</p> <p>Private IP for SMEs located 10 km from Jomo Kenyatta International Airport and 20 km from Nairobi's City Center</p>	<p>2,000 acres</p> <p>Plug-and-play industrial park in Kilifi County focused on green energy solutions</p>
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1. At different stages of development (e.g., Two Rivers Financial Center, Tatu City are operational, Mount Kipipiri is under construction)

13 County Aggregation and Industrial Parks (CAIPs)¹



Incentives within CAIPs match offerings from landbanks



SEZs



EPZs



Industrial parks

Partner with KenInvest – Your Gateway to Investing in Kenya



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