



Business Process Outsourcing (BPO) investment opportunity in Kenya



MINISTRY OF INVESTMENTS,
TRADE AND INDUSTRY



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Industrial Confidence at Scale.

At a defining moment in Kenya's industrial journey, ARISE IIP Kenya is delivering a new standard for industrial development — built on coordination, partnership, reliability, and long-term performance.

Kenya's industrial advantage rests on five structural strengths: a renewable-powered energy base, integrated logistics corridors linking ports, rail, and airports, a stable and investor-confident macroeconomic environment, a leading digital and innovation ecosystem, and growth-enabling industrial policy frameworks, including strategic incentives.

The ARISE IIP Kenya platform is anchored by a secured portfolio of industrial zones across Kenya's key economic corridors — including Vipingo Special Economic Zone on the northern coast, the port-adjacent Coast Integrated Industrial Park (CIIP) SEZ in Mombasa, Great Rift Industrial Park (GRIP) SEZ in the geothermal-rich Rift Valley, and the fiber-to-fashion Rivatex SEZ in Eldoret, western Kenya. Each zone plays a distinct role within the national industrial platform, enabling manufacturing, processing, and export activity to be deployed where location, infrastructure, and energy advantages perform best.

By aligning a secured multi-zone industrial portfolio under common standards, sector logic, and investor pathways, ARISE IIP Kenya delivers a single, coordinated industrial platform enabling investors to enter with clarity, operate with certainty, and scale across locations without restarting the investment journey.

The ARISE IIP Kenya industrial platform is not a collection of zones.

It is Kenya's industrial advantage system — designed for delivery.

Coordinated. Reliable. Low-Carbon. Globally-Connected.

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Acknowledgements



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Teleperformance
each interaction matters

G:ENESIS
UNLOCKING VALUE

tana



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BUSINESS PROCESSES
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ASSOCIATION OF KENYA



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“Our goal is to enable at least 1m digital workers over the next 5 years, supported by investments in infrastructure such as national broadband and digital hubs”

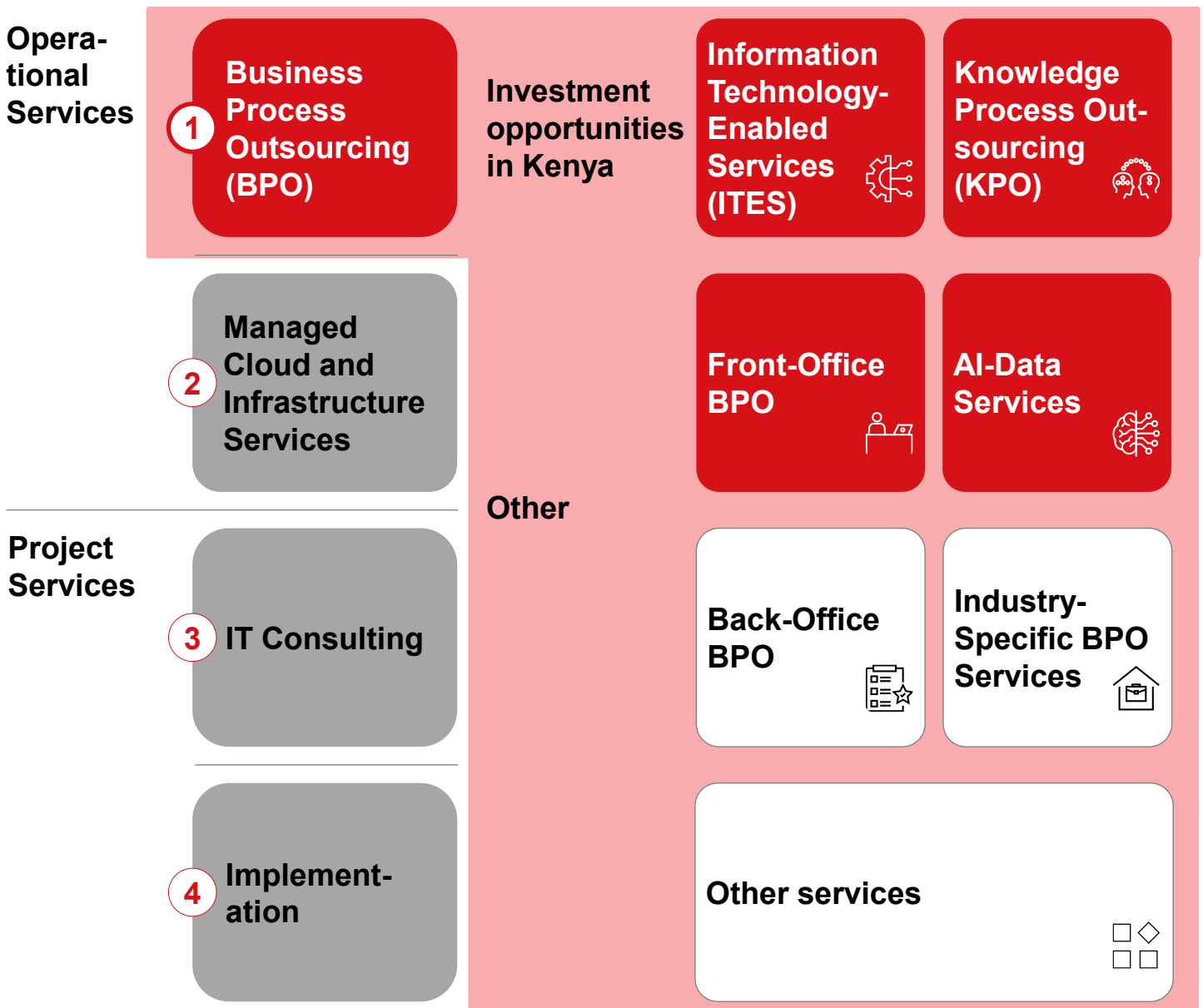
His Excellency Dr. William Ruto, C.G.H.,
President of the Republic of Kenya

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

■ Focus of this document

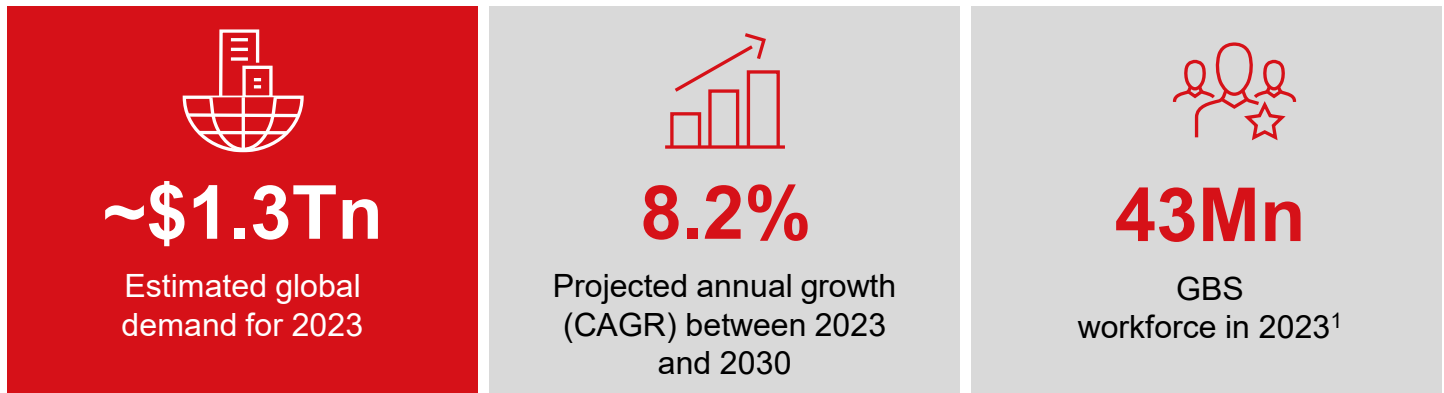
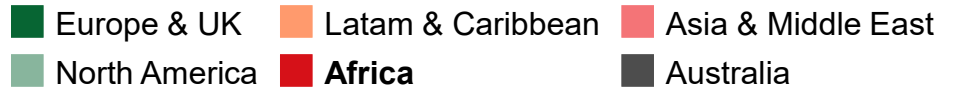
Global Business Services (GBS) service lines

BPO sub-sectors

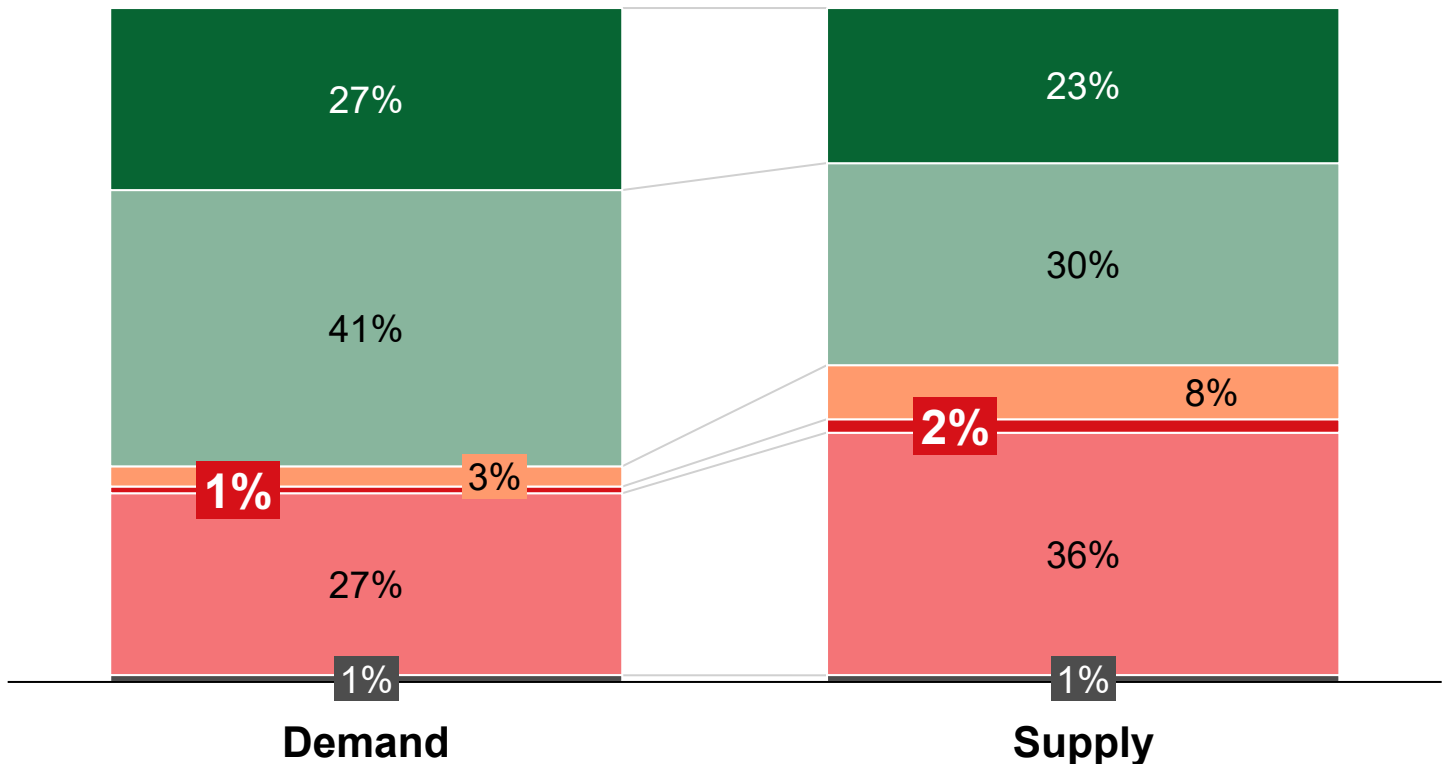


Source: Gartner, Everest

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



GBS Market demand and supply², 2023, %



1 Estimates by Genesis Analytics

2 Demand and supply independent of each other, i.e., regional supply does not necessarily meet regional demand

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

NOT EXHAUSTIVE

	India	Philippines	South Africa	Kenya
Key market				
Market size	\$254 Bn	\$37.9 Bn	\$2.9 Bn	\$700Mn
Offshore CX confidence Index	1st	6th	8th	11th
Key characteristics and growth drivers	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)	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)	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	Started as a cost-competitive, English-speaking contact-center base , now transitioning into higher-value GBS services, driven by deep labor market and modern digital infrastructure



Key trends

Automation



- ~40% of GBS jobs vulnerable to job replacement due to AI-driven, 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



As Kenya's BPO sector evolves, it should expand into GBS by positioning as Africa's AI-ready, compliant, youth-driven CX hub

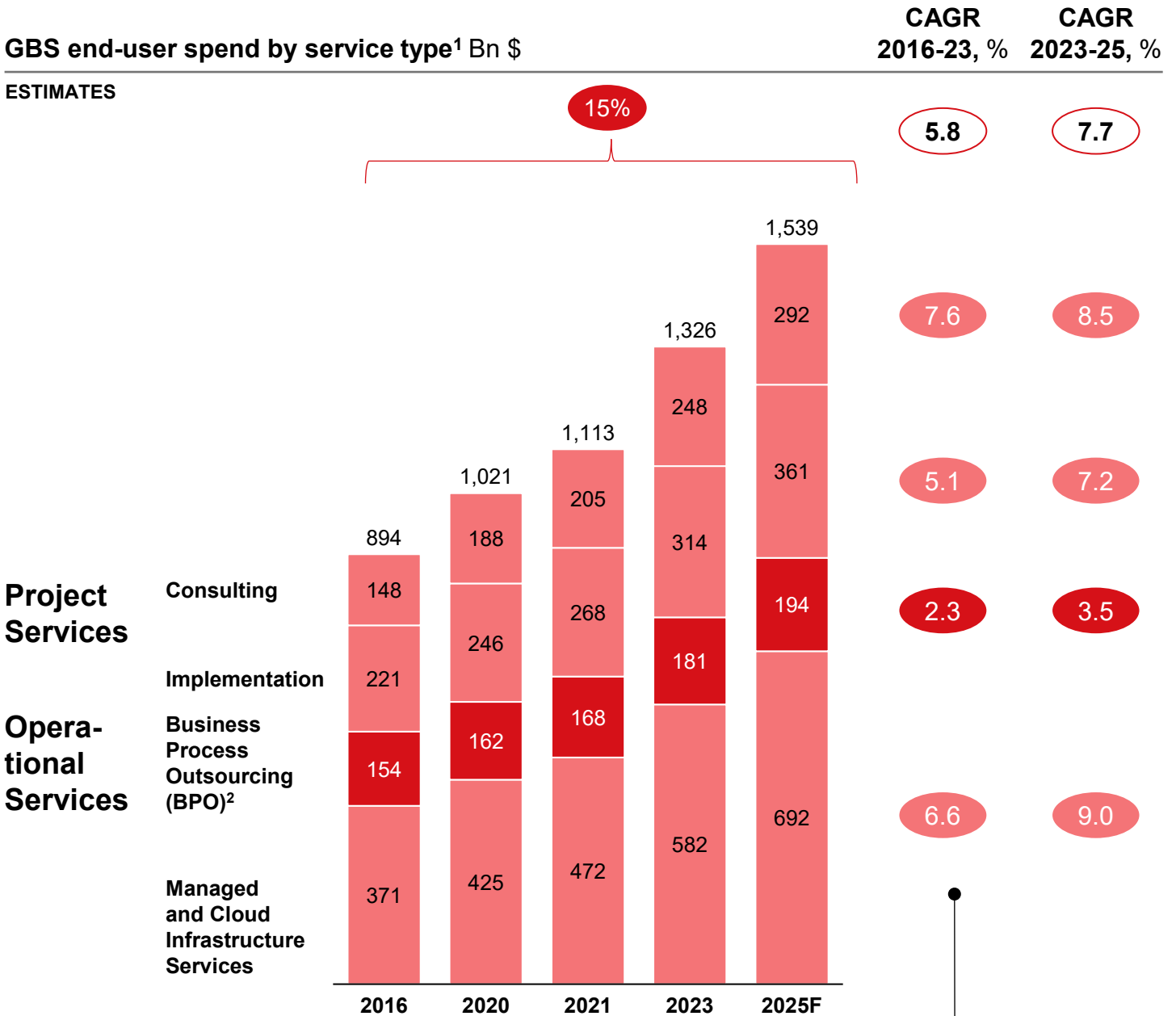
1. Rationale for selection: India - largest BPO player globally | Philippines - large global player and comparable emerging market to Kenya | South Africa - largest BPO market in Africa
 2. Accounting for 56% of service exports in FY 2024
 3. Software Technology Parks of India

Source: India size – Invest India | Philippines size– Knight Frank | South Africa size- BPESA | Kenya Size- Invest Kenya | [Offshore CX confidence index](#)



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

x BPO share of GBS x BPO



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



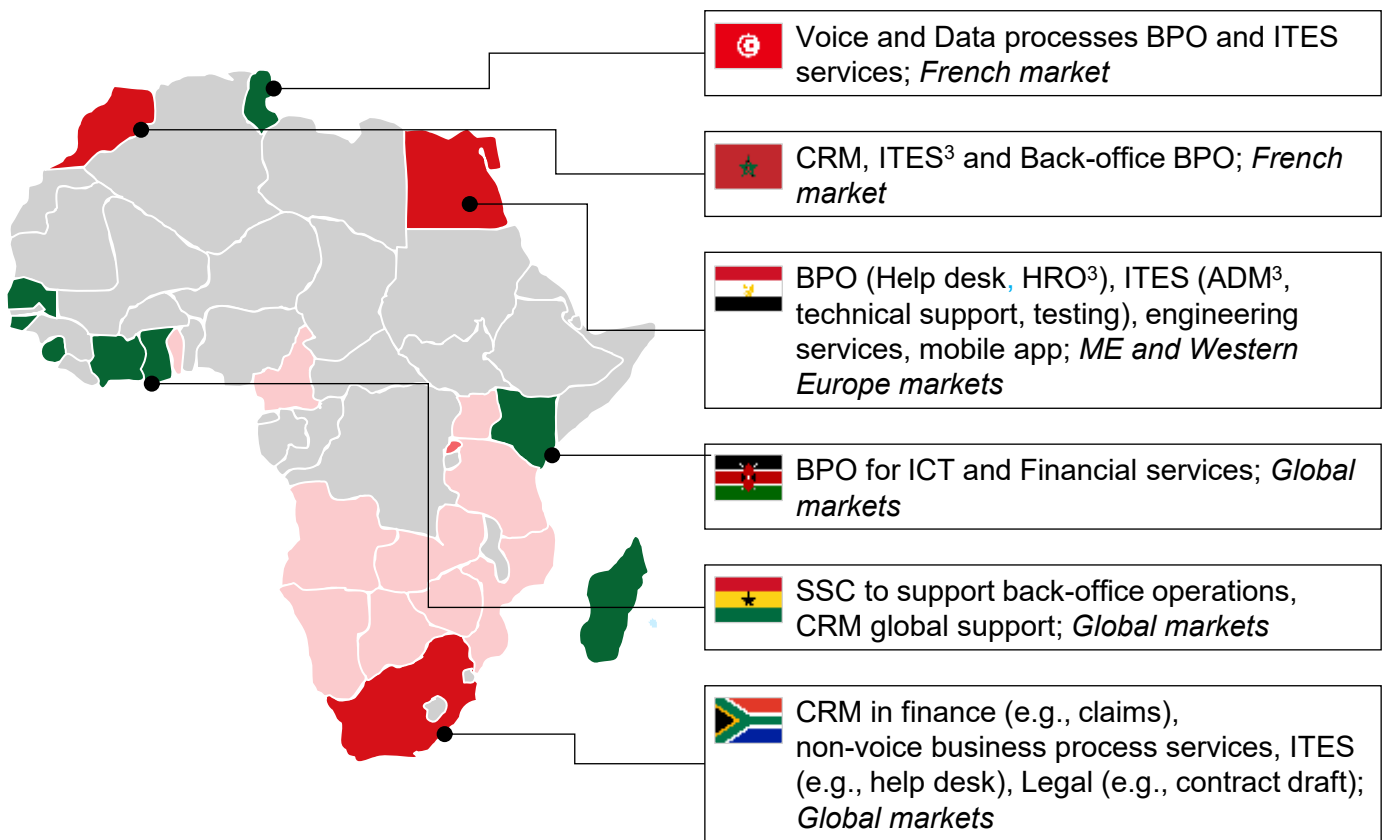
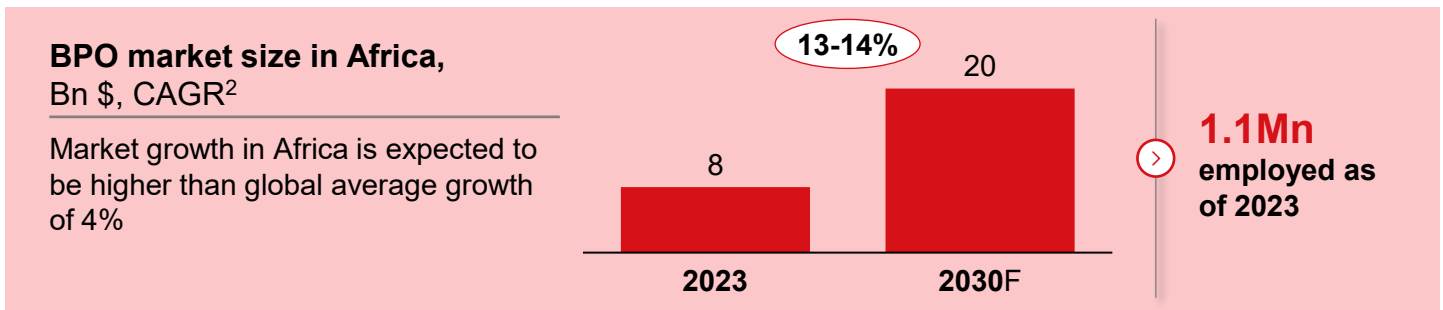
Improving digital infrastructure and growing tech ecosystems to support the delivery of IT enabled services

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

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

Offshore hubs across Africa and key services examples¹




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 is positioned competitively in the 2026 East and Central Africa GBS benchmark

Kenya vs. East and Central Africa benchmark snapshot (2026)

Metric	 Kenya	Regional Peer Average ¹
Addressable Talent Pool	642K B2 English	Lower across most peers
Existing GBS Workforce	36K	Smaller in most peers
Fully Loaded Seat Cost	Competitive	Slightly lower than SA, competitive vs EAC
ITES Capability	Advanced	Emerging in peers
AI Data Services	Established	Nascent in peers
Regulatory Framework	GDPR- aligned	Limited alignment in region
Cybersecurity ranking	Top 5 in Africa	Lower in most EAC
Monthly ramp capacity	17,000	Less than 10,000



Key Takeaways



Transitioning from a low-cost BPO destination to an AI-enabled GBS hub, positioning ahead of regional peers



One of the most mature GBS ecosystems in East and Central Africa, with strengths in CX, AI-driven data services, and IT-enabled services

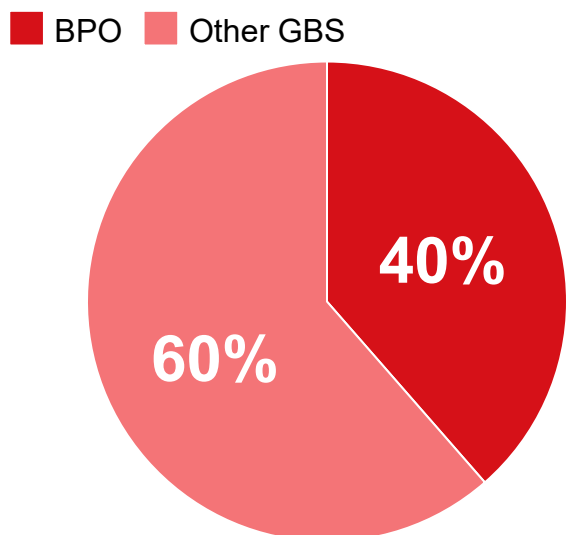


Strong regulatory maturity, with GDPR alignment that exceeds most East African peers

1. Uganda, Tanzania, Rwanda among others

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

Size of Kenya's GBS and BPO¹ 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



33%

of Africa's labor market⁴



~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

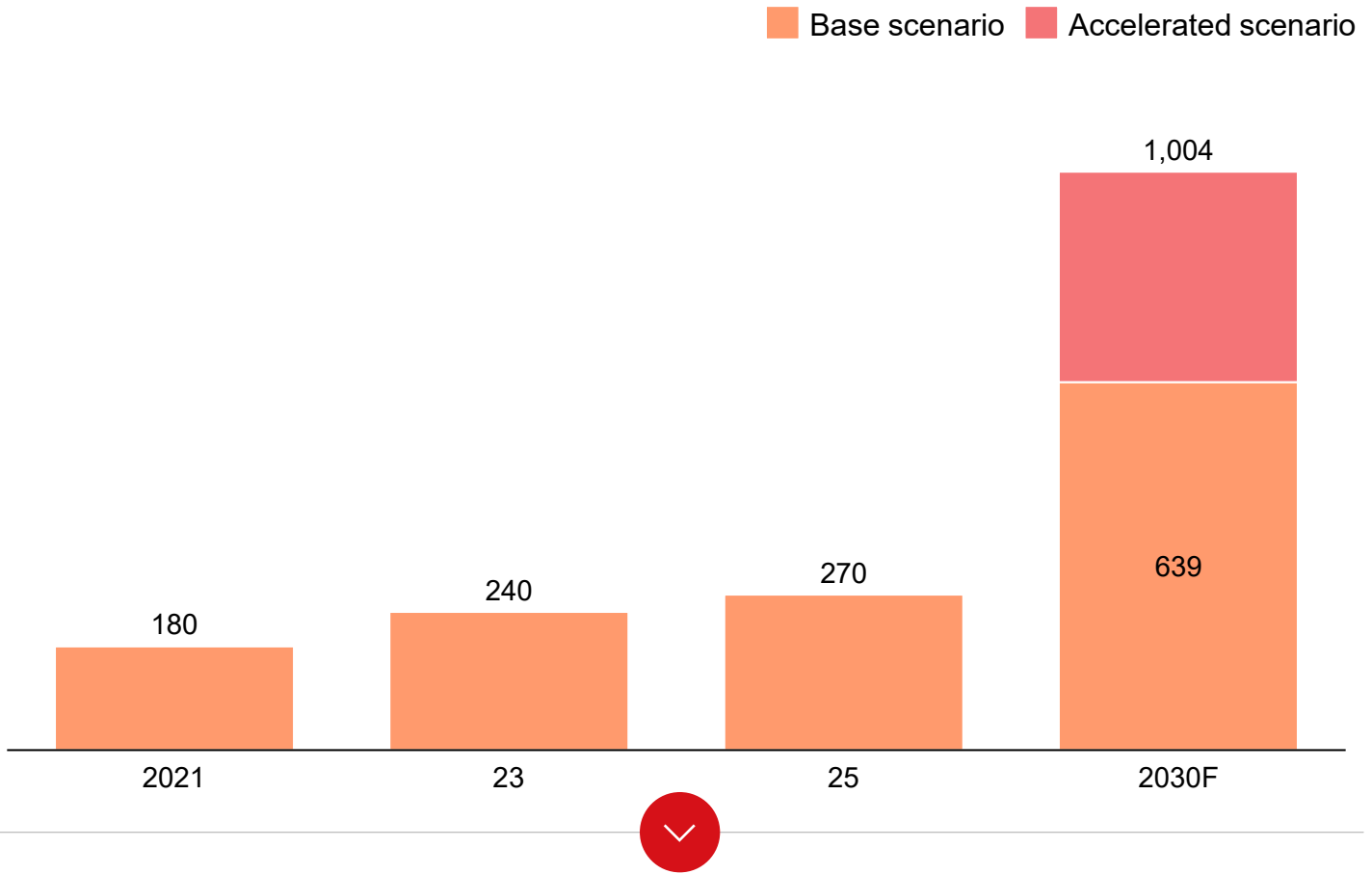
3. Bottom-up calculations from Genesis Analytics

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 \$1Bn by 2030

Kenya's BPO sector growth¹, 2025-2030F, \$ Mn



Drivers of BPO growth in Kenya

Cost-competitive BPO offerings compared to peer countries (60-70% lower than US/EU)

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**

Emerging hub for **AI data annotation, content moderation, multilingual AI** (incl. Kiswahili datasets)

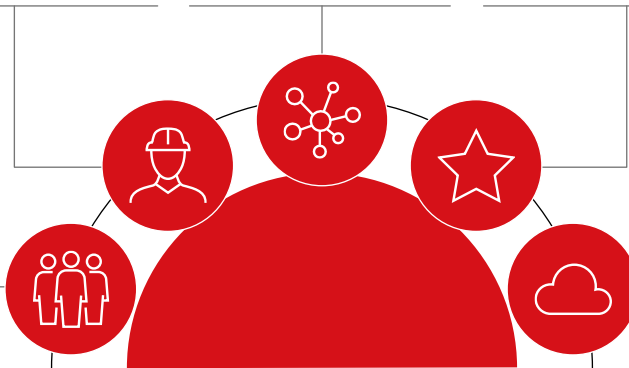
¹ Base scenario assumes growth at 18.8% p.a. in line with Kenya's GBS market growth rate from 2023-24 per Genesis Analytics. Accelerated scenario assumes growth at 30% p.a.

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

Kenya's competitive advantage sets it apart for BPO services

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- 1. >2Mn young¹, 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 multiple **success stories from international investors featured in this section**



Details follow

1. Between 18 and 35 years old

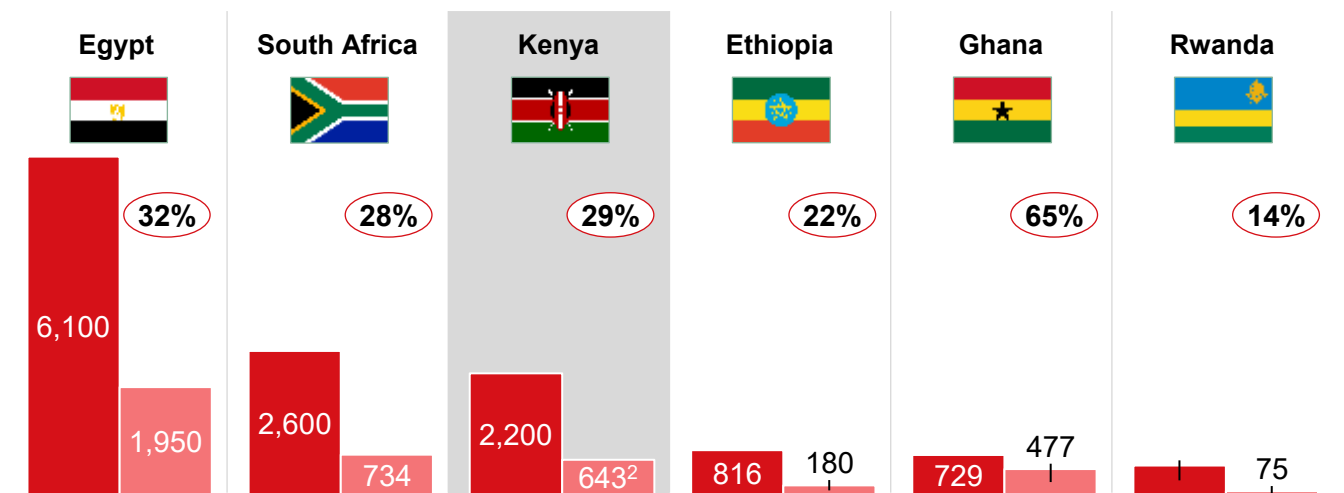
Source: Experts input, Genesis Analytics, Submarine Cable Map

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

Estimated total and B2 English-speaking addressable talent pools¹ among notable African BPO locations

000

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



EF English Proficiency Index ranking, out of 116 countries³

82nd

11th

19th

63rd

41st

113th



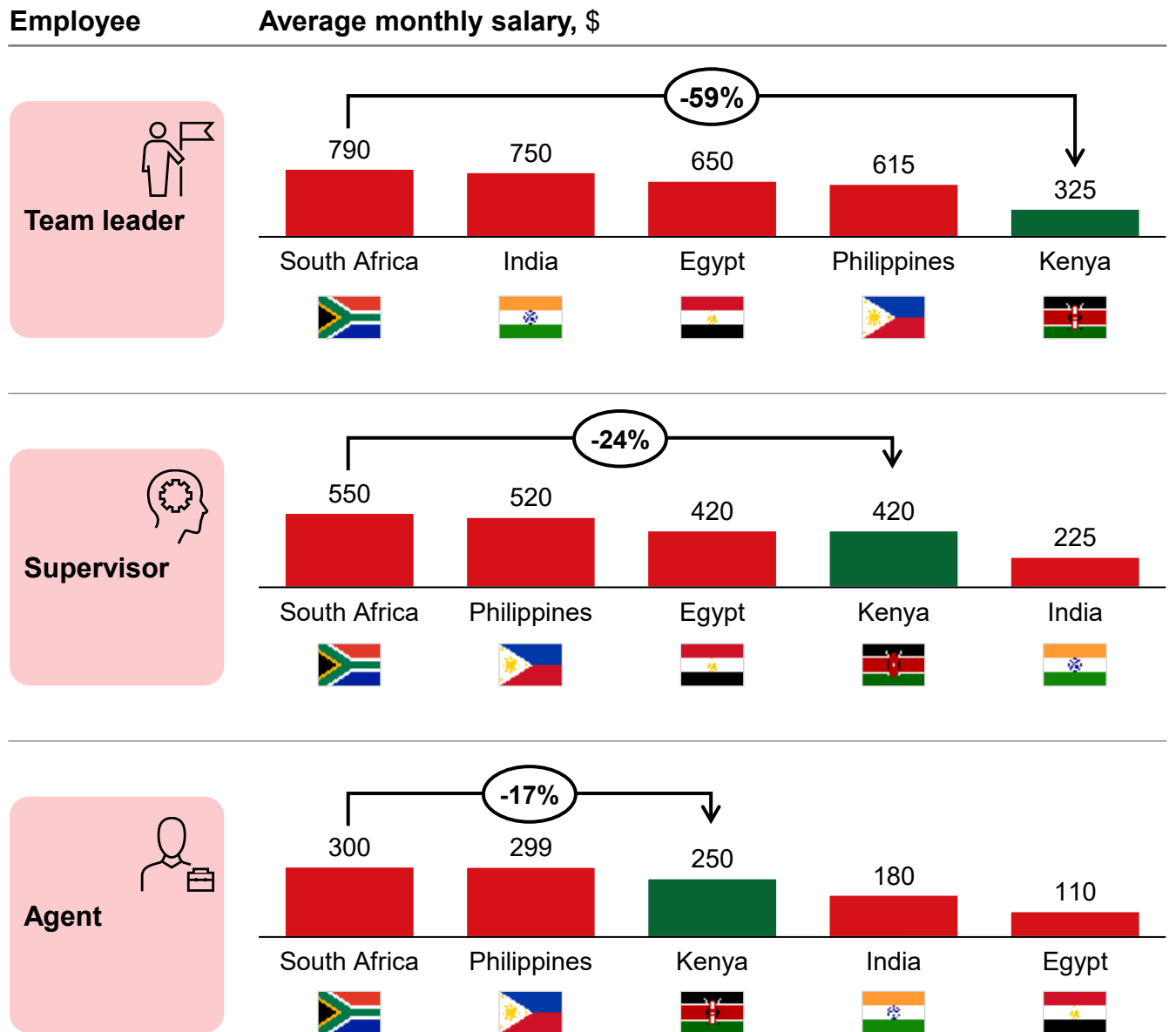
Kenya has a pool of **642k** B2-proficient English-speaking talent, the **third largest** in Africa. This gives Kenya the capacity to ramp-up **17k** new BPO hires monthly without depleting the talent pool.

1. Not specific to BPO sector, but addressable talent pool within the total workforce
 2. Represents addressable talent pool compared to ~36,000 currently employed in the GBS/BPO sector
 3. 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

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



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

NOT EXHAUSTIVE

x More expensive compared to peers x Cheaper compared to peers

Competitor market contact center/BPO monthly salary comparisons

\$

Job description	Kenya	Poland	Malaysia	South Africa	Jamaica	Philippines	Egypt	India	Rwanda	Ghana	Peer average
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

NOT EXHAUSTIVE

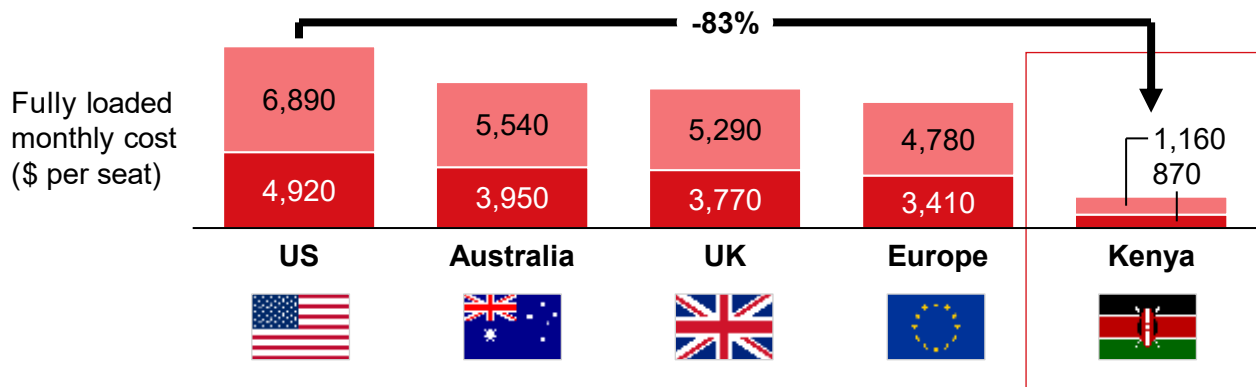
■ Minimum ■ Maximum

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



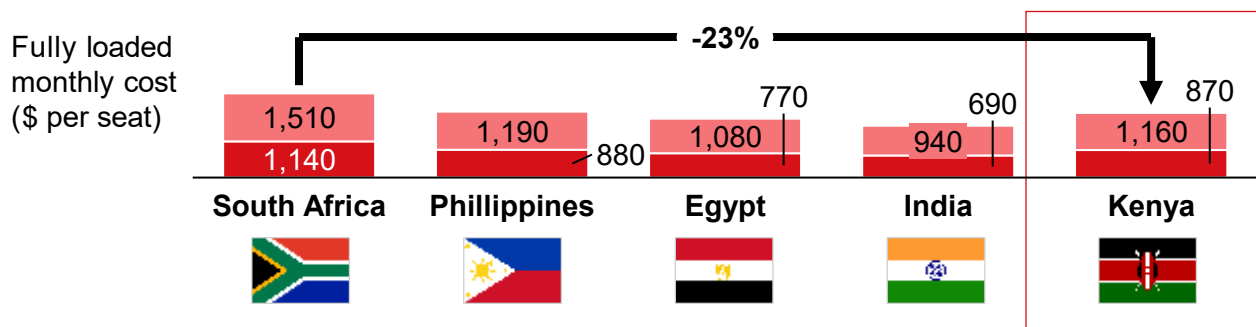
Fully loaded (FTE) Source Market contact center monthly costs vs. developed economies¹

Fully loaded (FTE) monthly costs of a contact center operation (\$ per seat, estimated)



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

Fully loaded (FTE) monthly costs of a contact center operation (\$ per seat, estimated)



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

<p>Strategic Time Zone</p>	<p>Nearshore access to Europe and UK</p>	<p>Aligns with Asian working hours</p>	<p>Supports 24/7 US operations</p>
<p>International Access</p>	<p>~9 hours Direct flights to Europe</p>	<p>~8 hours Access from Asia</p>	<p><15 hours Direct flights to the US eastern seaboard</p>
<p>Regional Access</p>	<p>Gateway to East African markets, and other markets through the AfCFTA¹</p>	<p>331Mn+ East African population</p>	<p>Cross-border logistics hub</p>

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

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

Sample players

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



Internet connectivity



- **1.5M+** internet subscriptions
- **6** undersea cables
- **20,000KM** of fiber optic cable installed and over **100,000KM** planned



Investment and funding



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



1. 70 million active SIM subscription

Source: Communications Authority of Kenya, Central Bank of Kenya

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



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 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 Invest Kenya'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

Investment potential exists across 3 BPO sub-sectors in Kenya

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	Current activity in Kenya	Example operators	Opportunity going forward
<div style="background-color: red; color: white; padding: 10px; border-radius: 15px; display: flex; align-items: center;"> <div style="margin-right: 10px; font-size: 24px; font-weight: bold;">1</div> <div> <p>ITES¹ and Knowledge Process Outsourcing (KPO)</p> </div> </div>	<p>Kenya is a regional leader in IT helpdesk, application development and cloud services, with emerging market research and data analysis capabilities</p>		<p>Leverage the 'Silicon Savannah' ecosystem to enhance digital services while positioning as a research hub through competitive offerings² and a growing pool of skilled graduates</p>
<div style="background-color: red; color: white; padding: 10px; border-radius: 15px; display: flex; align-items: center;"> <div style="margin-right: 10px; font-size: 24px; font-weight: bold;">2</div> <div> <p>Front office</p> </div> </div>	<p>Established outsourcing destination, especially for customer service and lead generation</p>		<p>Expand and strengthen existing service offering to establish Kenya as a leader</p>
<div style="background-color: red; color: white; padding: 10px; border-radius: 15px; display: flex; align-items: center;"> <div style="margin-right: 10px; font-size: 24px; font-weight: bold;">3</div> <div> <p>AI-data services</p> </div> </div>	<p>Regional leadership as an AI solutions delivery leader with opportunities for further growth</p>		<p>Develop talent and infrastructure to strengthen AI services capabilities</p>

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, including call centers, helpdesks, technical support, lead generation

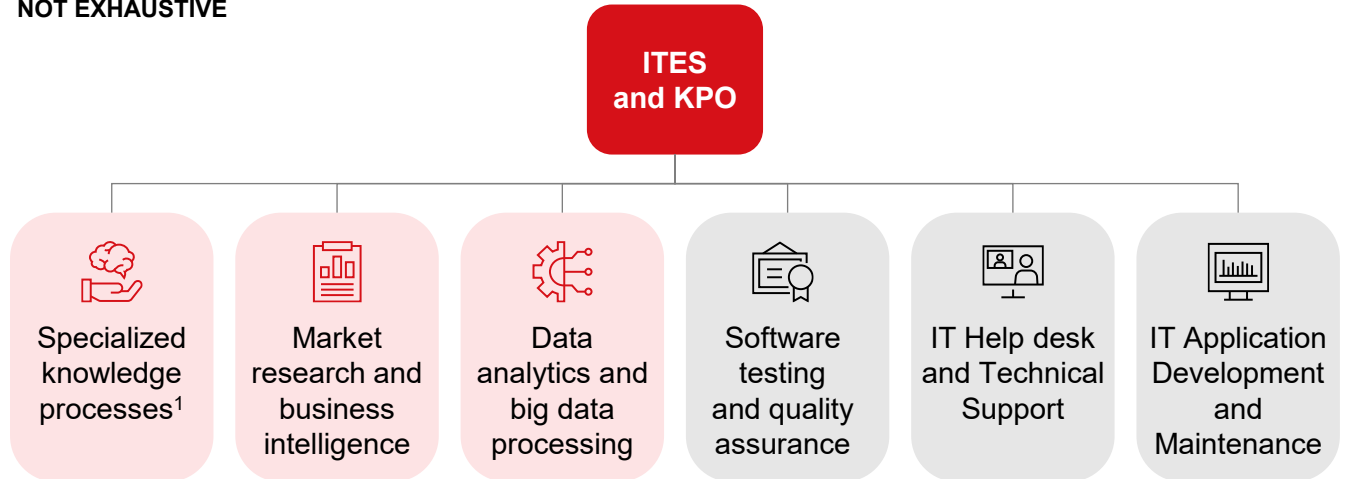
Source: Expert input

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

High-potential service lines

NOT EXHAUSTIVE

■ ITES ■ KPO



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 leader²

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

Kenya is very strong in core BPO delivery but has room to grow in IT support, AI and regional GBS service centers

Kenya’s capability across skill depth by service line value chain

Skill Tier	Description	Kenya Strength
Tier 1: Voice CX	Basic inbound/outbound support	High
Tier 2: Back Office	Billing, admin, claims	High
Tier 3: IT & Technical Support	Helpdesk, tech ops	Emerging
Tier 4: Analytics & Digital	Data analytics, AI ops	Developing
Tier 5: Captives & Shared Services HQ	Regional GBS	Target 2030



Key enablers of growth



Talent ramp-up and scalability

Will be strengthened by a structured digital skills pipeline of:

~**642,000** B2 English speakers, ~**109,000** placed under Ajira, nyota program targeting ~**820,000** jobs, **1,450** ward-level **digital hubs** and having **10,000 ICT graduates** annually.

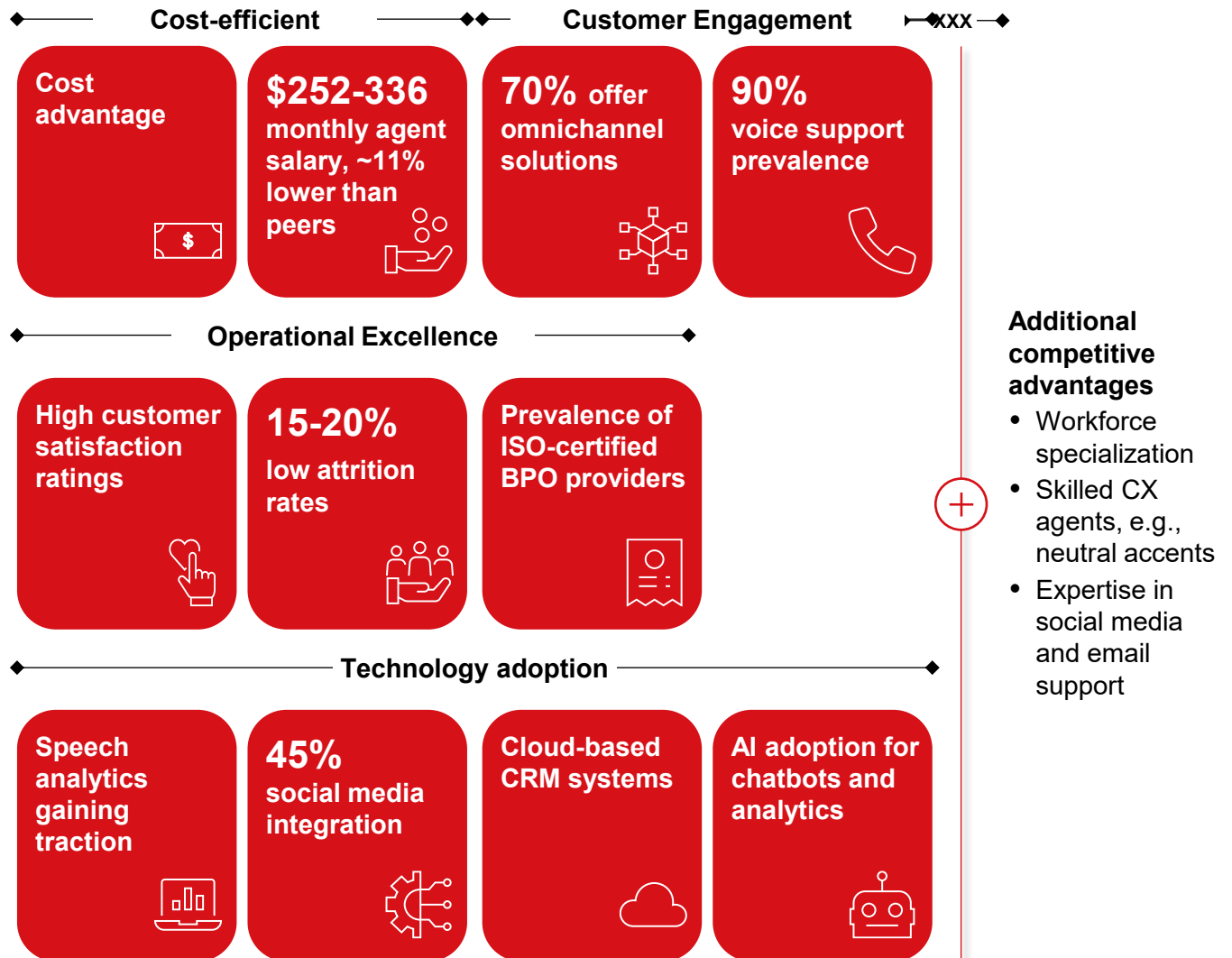


Talent scalability framework pillars

Create a **pipeline and pathway** to move talent up the tiers: the **National Digital Master Plan** builds the digital foundations and demand, while the **Digital Labor Policy (2026)** sets clearer standards and incentives to grow formal digital jobs. **Ajira Digital** expands entry-level and mid-tier employability at scale, and **private academies** like **Moringa** and **ALX** accelerate higher-skill tech, data and analytics training

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

Competitive advantage



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



Key service lines

- 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

Supportive investment incentives across Kenya's BPO market

Detailed next

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

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**



Economic zones providing infrastructure support for BPO companies B

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



Government commitment to growth of the sector C

The government plans to **create at least 500K jobs in the digital and BPO sectors within 5 years** supported by **ward-level digital hubs** and **nationwide centers of excellence**



Public and private sector efforts towards skill development D

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



1. The General Data Protection Regulation
 2. Ministry of ICT and the Digital Economy
 3. Technical and Vocational Education and Training
 Source: Directorate of Immigration Services

A. Kenya provides a comprehensive investor protection framework

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



Investment facilitation

Invest Kenya 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)


- 


1
Lawful processing
Data must be collected and processed legally
- 

2
Purpose limitation
Data must be used solely for the intended purpose it was collected for
- 

3
Data minimization
Only necessary data must be collected
- 


4
Accuracy
Data must be kept up to date
- 

5
Storage limitation
Data must not be retained longer than necessary
- 

6
Security and confidentiality
Organizations must ensure appropriate data security measures
- 

7
Accountability
Data controllers must ensure and demonstrate compliance with data regulations
- 

8
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)
<p>#21 Kenya’s global ranking in the ITU’s Global Cybersecurity Index (2024), and a Top 5 ranking in Africa</p>	<p>Enhanced regulations and policies, strengthening institutional framework for cybersecurity governance with clear leadership and accountability</p>
<p>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</p>	<p>Proactive incident identification, mitigation, response, and management to enhance protection and resilience of critical information infrastructure</p>
<p>200+ Current members of the Kenya Cybersecurity and Forensics Association</p>	<p>Cybersecurity capability building and capacity development, including through public and private sector cooperation and international collaboration</p>
<p>What this means for a BPO player Strengthened cybersecurity and critical information infrastructure, with enhanced governance and accountability frameworks</p>	

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

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

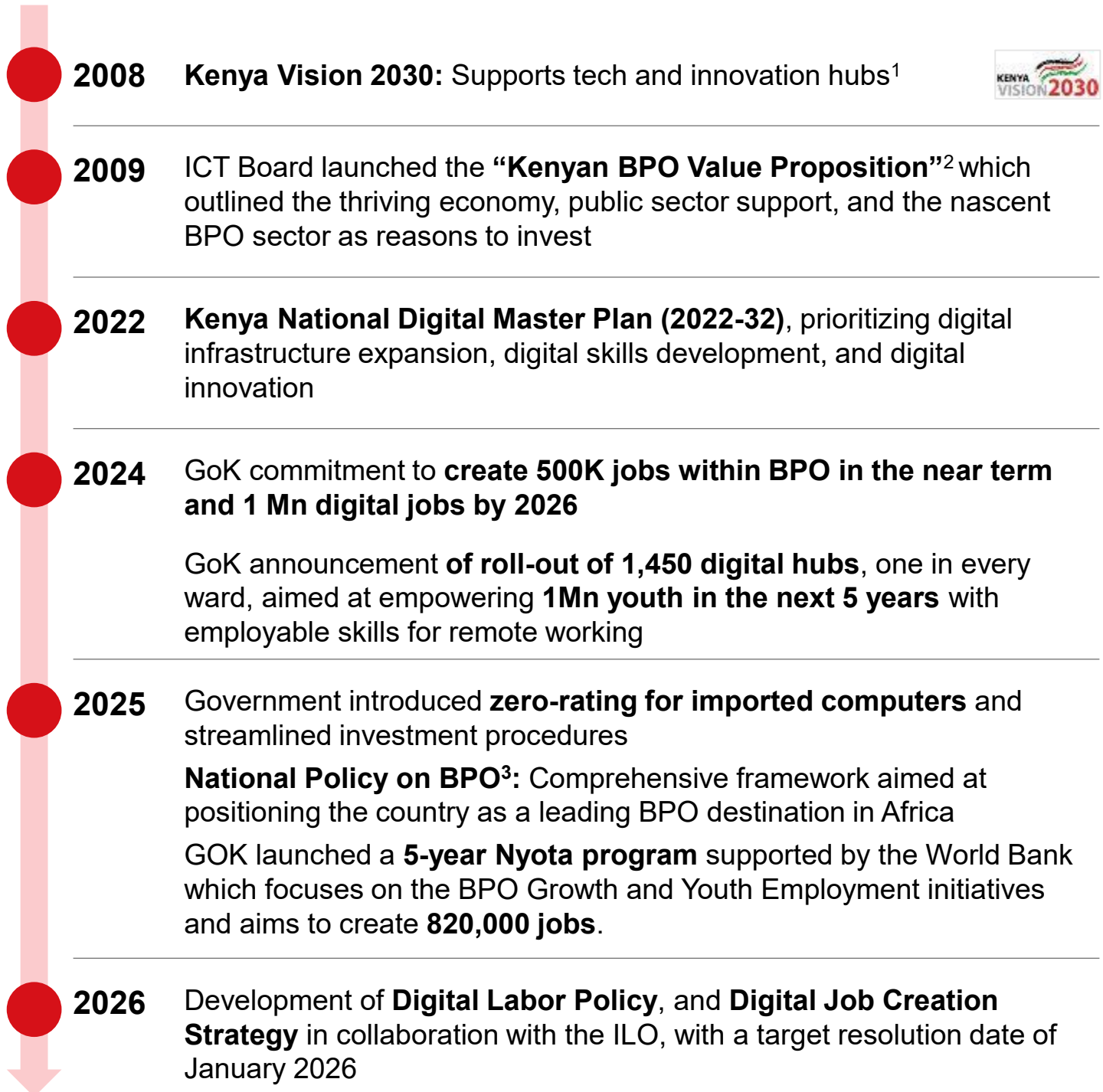
“ *Our decision to expand across Kenya reflects our profound confidence in the country's thriving BPO industry and its capacity for sustained growth*

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

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



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
	 	<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>

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

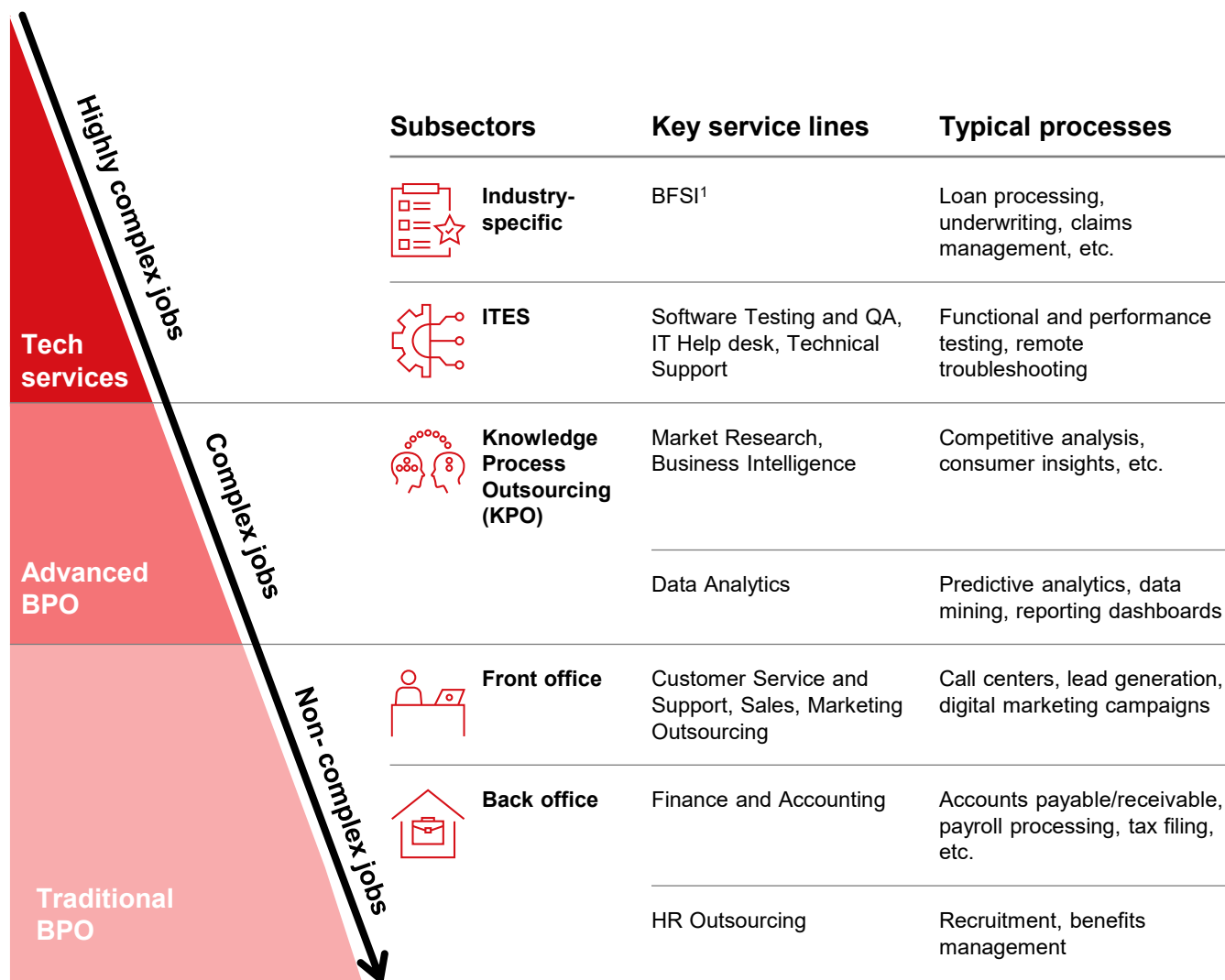
Annexure

The BPO sector can be broken down into 6 broad segments

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



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

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

~\$131b
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	~\$0.5TB	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



6th
largest
economy
in Africa

**Stable economy and
leading vibrant
democracy**



~93%
renewable
energy¹ at
competitive
rates

**Leading Africa's green
transition**



4
international
airports

2
seaports

**Logistics and innovation
hub of the region**



>80%
literacy rate

**Young, trainable, and
productive workforce**



50+
active
tech hubs
countrywide

**Robust digital and tech
ecosystem aligned with
EU regulations**



100%
repatriation
of profits or
interests

**Incentives for
investment
and investor
protection**

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

Kenya is rated...

Number 1



Greatest investment momentum in Africa in 2024¹



Funding to start-ups in Africa (~ \$984M in 2025)²



Greenfield projects in East Africa in 2023³

Number 3



On Ease of Doing Business in sub-Saharan Africa⁴



Women's financial and economic inclusion in Africa⁵



Fastest-growing economy in Africa in 2023⁶

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

Note: As of July 2025

Kenya operates 140+ economic zones with incentives for investors



<h3>Investor incentives within SEZs and EPZs</h3>	<ul style="list-style-type: none"> • 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
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<p>Nairobi International Financial Centre (NIFC) also offers incentives</p>	<p>Regulatory flexibility and fast-tracking</p>	<p>Reduced corporate tax rate of 15% for 10 years</p>	<p>Incentives for green bonds, REITs, and infrastructure bonds, including tax exemptions or lower tax rates</p>
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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 multiple 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
47 CAIPs in development

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 parks¹



1

Vipingo SEZ
Kilifi
2,000 acres



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



2

Two Rivers Financial Center
Nairobi
64 acres



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



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

Mount Kipipiri Golf and Resort
Nyandarua
1.478 acres



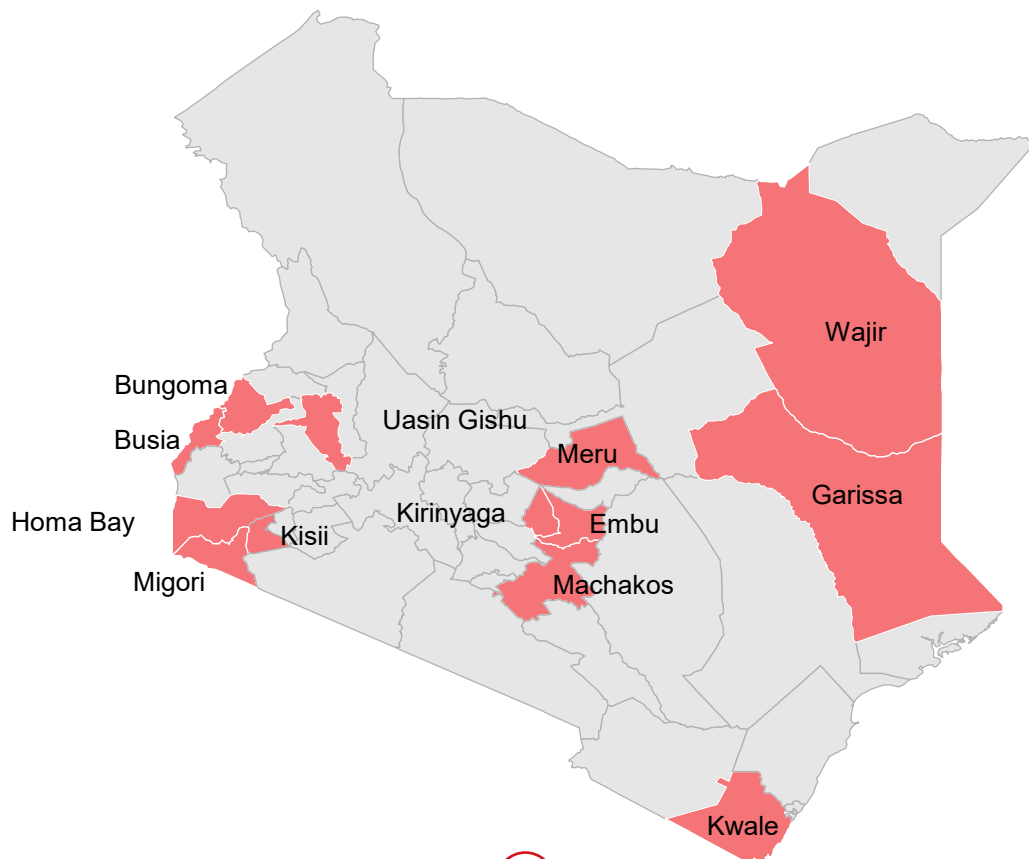
Megaproject in Kipipiri, Nyandarua

Source: SEZA, EPZA

Incentives within County Aggregation and Industrial Parks (CAIPs)

13 County Aggregation and Industrial Parks (CAIPs)¹

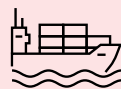
Counties with a CAIP



Incentives within CAIPs match offerings from landbanks



SEZs



EPZs



Industrial Park Model

1. To be completed by December 2025


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

**Get started
today!**

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expert...**

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rest of our
management
team**

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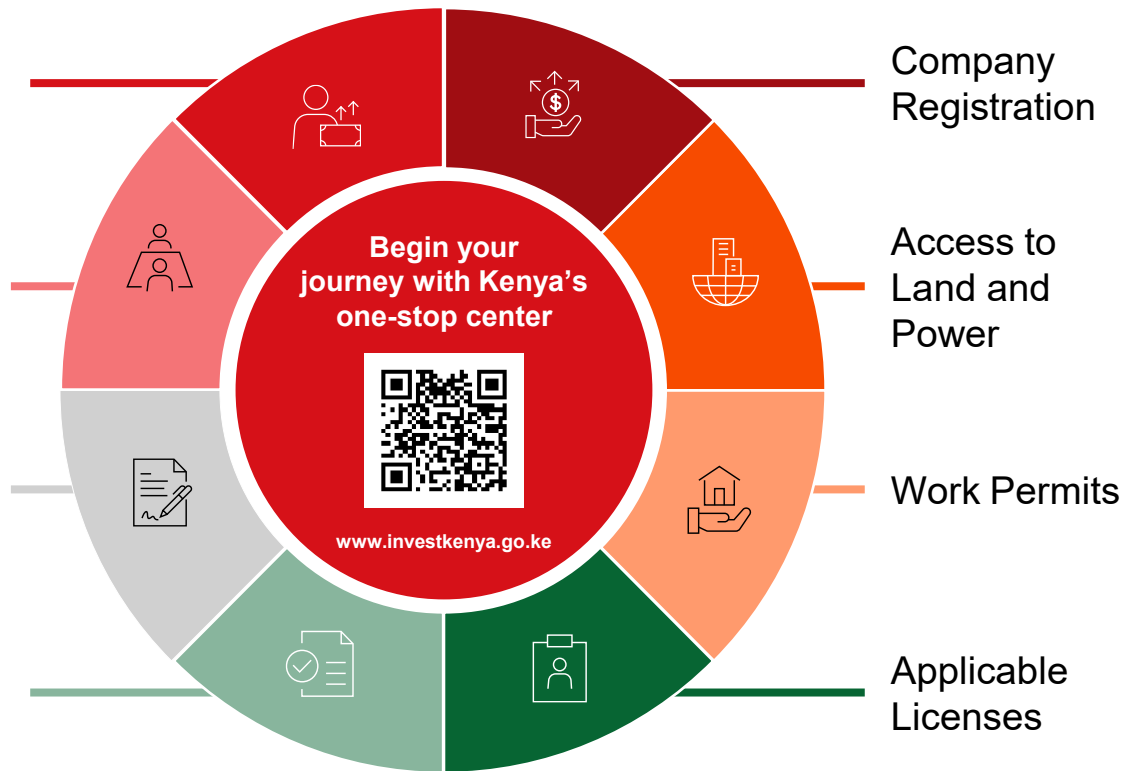
Partner with Invest Kenya – your gateway to investing in Kenya

#1 Source of Investment Data

Business Climate support

Investment Deal-room

EPZ and SEZ set up



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