Rwanda Global Business Services (G
Market Diagnostic Report

26 June 2025

RWANDA GLOBAL
BUSINESS SERVICES
GROWTH INITIATIVE

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Executive Summary | Infographics: Rwanda at-a Glance

Location: East Africa

English & French
As the business language

Major population areas

As of July 1, of the year indicated

	1,329,830 (est.)
	476,522 (est.)
	87,600 (est.)

Economic Indicators

$13.7 Billion Gross Domestic Product (GDP)	**-0.4%** Inflation Rate (CPI)
$1,040 GDP per Capita	**4.5%** Policy Interest Rate
7.8% in 2025 Economic Growth	**28%** Corporate Tax Rate
RWF 1,454.4 to $1 Exchange Rate (Rwandan Francs to US Dollar *As of 27 October 2025*	**18%** VAT/Sales Tax

Population Statistics

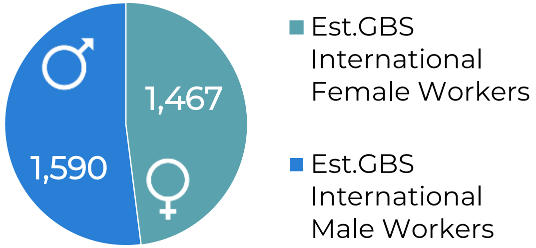
14.2 Million Est. Total Population (2025)	**4.1 Million** Est. Youth Population (18-34)
6.9 Million / 49.1% Est. Male Population	**4.9 Million*** Est. Employed Population (Q3, 2025) **Calculated from working-age population of 8,5 million*
7.3 Million / 50.9% Est. Female Population	**13.4%** Est. Unemployment Rate (Q3, 2025) **25.6%** NEET** % ***Youth not in employment nor currently in education or training*

Sources: 1.., Worldometer / Countrymeters 2. Trading Economics, 3. National Institute of Statistics of Rwanda/ NISR 4. GBS.World Africa Benchmarking & Market Report, 5. Rwanda National Employment and Skills Strategy (2024-2029).

Executive Summary | Infographics: Rwanda at-a Glance

Key GBS sector statistics

3,057*
Est. GBS International Workforce (2025)



$65.5 Million
Est. International GBS Market Size (2024)

75,121
Addressable B2 English Talent Pool

2,087
Estimated B2 English Monthly Ramp-Up Speeds

1,009
Est. GBS Impact Sourcing Workforce

Languages Currently Serviced
English (Main)
French (Secondary)
Kinyarwanda (Local)
German, Arabic and Portuguese (Exploration stage)

Key industry verticals served

BFSI	Healthcare	Retail	Technology	Telecom	Travel

BANK

**GBS international workforce based on 2025 Q2 (Apr-Jun) Rwanda Mapping Tracker*

Sources: 1. Rwanda 5th Population and Housing Census (2022), 2., Worldometer / Countrymeters 3. Trading Economics, 4. National Institute of Statistics of Rwanda, 5. GBS.World Africa Benchmarking & Market Report, 6. Rwanda National Employment and Skills Strategy (2024-2029).

AI: Artificial Intelligence

AI Policy: Rwanda's national framework to promote responsible, inclusive AI development and deployment for economic transformation

AI Readiness Framework: A tool to assess and monitor Rwanda's capabilities to implement AI across sectors

ALX: A digital skills accelerator providing training in software engineering, data, and workplace readiness

Amalitech: A digital services and impact sourcing company operating in Rwanda and Ghana

BPO: Business Process Outsourcing

BPESA: Business Process enabling South Africa; industry body for GBS in South Africa

CCI Global: A multinational BPO company operating delivery centres in Kigali

C4IR: Centre for the Fourth Industrial Revolution Rwanda – driving responsible tech adoption including AI

CX: Customer Experience

Data Protection Law: Rwanda's legal framework regulating the collection, processing and transfer of personal data

GIZ: Deutsche Gesellschaft für Internationale Zusammenarbeit; German development agency supporting Rwanda's GBS and AI strategies

GBS: Global Business Services ; includes BPO and ITO operations

GBS GI: Rwanda Global Business Services Growth Initiative; private sector-led initiative established by Harambee, in partnership RDB, MINICT, and the GIZ Special Initiative "Decent Work for a Just Transition" implemented by GIZ.

ICT: Information and Communication Technology

ICT SSP: ICT Sector Strategic Plan 2024–2029; outlines Rwanda's roadmap for digital transformation

ITO: Information Technology Outsourcing; part of GBS focused on tech support, software, and infrastructure services

Kigali Innovation City (KIC): A mixed-use tech and education hub housing universities, innovation labs and offices

KLab/FabLab: Tech innovation and maker spaces in Kigali supporting startups and digital prototyping

KPI: Key Performance Indicator

LAC Region: Latin America and the Caribbean

MINEDUC: Ministry of Education

MINECOFIN: Ministry of Finance and Economic Planning

MINICT: Ministry of Information, Communication Technology and Innovation

MININFRA: Ministry of Infrastructure

MOH: Ministry of Health

ML: Machine Learning

NASSCOM: National Association of Software and Service Companies (India) – benchmark association for GBS

NEET: Not in Education, Employment, or Training

NST1/NST2: Rwanda's National Strategy for Transformation – policy agenda for 2017–2024 (NST1) and 2024–2029 (NST2)

Norrsken House Kigali: One of Africa's largest hubs for entrepreneurship and social innovation

Professional and Shared Services: Business functions like HR, finance, ITO, and customer support, delivered either in-house (shared services) or outsourced (professional services) to improve efficiency.

PWD: Persons with Disabilities

RDB: Rwanda Development Board; lead investment promotion and private sector agency

RISA: Rwanda Information Society Authority – responsible for implementing national ICT policies

RRA: Rwanda Revenue Authority

RURA: Rwanda Utilities Regulatory Authority; oversees telecom, ICT infrastructure and data protection compliance

RWF: Rwandan Franc; national currency

SEACOM: Submarine internet cable connecting Rwanda to international fibre infrastructure

SEZ: Special Economic Zone – designated area with investor-friendly infrastructure and incentives

Smart Rwanda Master Plan: Government blueprint to drive digital transformation and e-governance

STEM: Science, Technology, Engineering and Mathematics

TCX: The Collective X – skills training and ecosystem support partner for Rwanda's GBS talent pipeline

UNDP: United Nations Development Programme

UX: User Experience

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Introduction | Methodology and scope of the Market Diagnostic

This Market Diagnostic evaluates Rwanda's **GBS and ITO** potential across 14 thematic areas, including talent, cost competitiveness, infrastructure, enabling policy, investor activity, and demand trends. The study aims to inform **investor engagement, workforce development**, and **ecosystem strengthening** aligned with Rwanda's Vision 2050, NST2, and the Digital Transformation Agenda with the aim to strengthen Rwanda as a digitally enabled, inclusive, and knowledge-based economy .

The methodology follows a structured, mixed-methods approach, including:

- **Secondary research**: Review of 20+ national strategies, benchmarking reports, and case studies;
- **Stakeholder engagement**: Consultations with government, operators, training providers, and industry bodies;
- **Comparative benchmarking**: Cross-country analysis of Rwanda versus regional and global peers (e.g., Kenya, Ghana, South Africa);
- Statistical Analysis: Market growth and forecast on GBS market size and cumulative jobs; and
- **Synthesis and thematic analysis**: Insights structured across 14 sections reflecting the GBS buyer journey and sector development needs.

Data sources:

- Government and Strategy Documents:
- Ecosystem Reports and Guides
- Global and Regional Benchmarking
- Operator / Sector Case Studies
- Primary Inputs

Introduction | Importance of GBS for Rwanda's Economic Growth

The GBS sector is not just an economic lever for Rwanda; it is a transformative enabler of the country's strategic ambition to become a globally competitive, inclusive, and digitally advanced economy. By embedding impact, innovation, and investment in digital talent, Rwanda is positioning itself as a serious contender in the global outsourcing arena..

1. Economic transformation and job creation

The **GBS and digital/ITO sectors** are central to Rwanda's diversification and job strategy, expanding from only two firms in 2019 to over operators and 3,057 internation jobs in 2025. With a 2030 target of 20,000 jobs under the **GBS Growth Initiative**, it presents scalable formal opportunities for Rwanda's youth, addressing 24.6% unemployment.

2. Enabler of digital transformation

The sector aligns with **Rwanda's Vision 2050** and **Smart Rwanda Master Plan** by driving adoption of digital tools like AI, cloud computing, and cybersecurity. These sub-sectors underpin the national shift toward a digital economy and support goals in the **ICT Strategic Plan (2024–2029)** and **National AI Policy.**

3. Export growth and economic diversification

As a service export sector, the GBS industry helps Rwanda participate in **global value chains**. It **reached a market value of $65.5 in 2024**, offering an alternative growth engine to traditional sectors. It strengthens Rwanda's export base through digital service delivery.

4. Inclusive and impact sourcing

The sector promotes **inclusive hiring, supporting women, youth**, and **disadvantaged groups**. Companies like TeKnowledge and CCI Global integrate social impact into their models, contributing to Rwanda's inclusive growth goals.

5. Building a knowledge-based economy

Rwanda's **goal to train 1 million coders** underscores the sector's role in developing digital and language skills. GBS jobs strengthen capacity in AI, customer support, and IT services; essential foundations for a knowledge-driven economy

6. Strategic positioning and global appeal

With **low operating costs**, **political stability**, and **bilingual talent,** Rwanda ranks 10th globally for technical help desk delivery. It offers a boutique, high-value proposition for ESG-conscious investors and global clients seeking reliable and ethical outsourcing destinations.

The Rwanda GBS Growth Initiative is not just a sectoral programme - An industry body created in partnership with government, private sector, and development partners, focused on sector growth and development. It's goal is to institutionalize collaboration, coordinate efforts among stakeholders, and enhance the sector's investment support to drive economic growth in Rwanda.

RWANDA GLOBAL BUSINESS SERVICES GROWTH INITIATIVE

Sources: 1. RDB Annual Report (2024), 2. Rwanda ICT SSP 2024-2029, 3. Harambee GBS Africa Jobs Proposal, 4. National AI Policy for Rwanda, 5. Rwanda GBS Case study and Country Report. 6. TeKnowledge Rwanda Case Study

Introduction | Alignment with Rwanda's Digital Transformation & Job Creation Agenda

A burgeoning outsourcing hub in Africa, Rwanda is harnessing digital innovation and global business services to drive inclusive economic transformation. Through strategic alignment of national priorities, it is building a strong foundation for job creation, competitiveness, and future-ready talent in its evolving digital and service economy.

Strategic Policy Integration

Rwanda's **National Strategy for Transformation (NST1 & NST2)** and **Vision 2050**, which prioritise ICT-led growth, digital inclusion, and large-scale youth employment through innovation-driven sectors. Rwanda's **Smart Rwanda Master Plan** and **ICT Sector Strategic Plan (2024–2029)** form the foundational pillars of digitalisation in government, education, health, and business; all of which intersect directly with the GBS/ITO sector growth strategy

GBS Growth as a Job Creation Engine

The GBS Growth Initiative (GBS GI), launched in 2023 with support from from **GIZ 'Invest for Jobs'** programme, Harambee Youth Employment Accelerator and with endorsement by the Rwandan Ministry of ICT & Innovation (MINICT) and the Rwanda Development Board (RDB), **aims to facilitate over 20,000 GBS jobs by 2030**, targeting disadvantaged youth and women through impact sourcing and skilling pathways. As of 2025, the sector has already grown to support 3,057 international jobs, a significant leap from just six companies in 2019.

14.5 CAGR % sector growth

In Rwanda's **GBS sector workforce** from 2021 to 2024

ITO Sector and Talent Pipeline Development

The NST2's goal to **train one million coders**, and Rwanda's AI Policy's call to embed STEM and AI literacy at all education levels, align directly with ITO growth. Institutions like Carnegie Mellon University Africa and initiatives like the **Digital Ambassadors Programme** bolster Rwanda's future-ready talent base

Digital Economy Ecosystem Enablement

Rwanda's efforts to build a digital economy ecosystem that can attract, support, and retain global **GBS/ITO** firms by:

- Supporting **data governance**, **AI readiness**, **cloud infrastructure.**
- Leveraging **Special Economic Zones (SEZs),** and digitised **investment onboarding** (One Stop Centre, RDB).
- Facilitating **scalable GBS services** (CX, tech support, software development) linked to international demand.

"50,000 digital jobs & 1.5 million digitally skilled citizens by 2029"

-ICT SSP (2024-2029)

Sources: 1. RDB Annual Report (2024), 2. Rwanda ICT SSP 2024-2029, 3. Harambee GBS Africa Jobs Proposal, 4. UNDP: Leveraging Digitalisation for Transformative Governance in Rwanda (2024).

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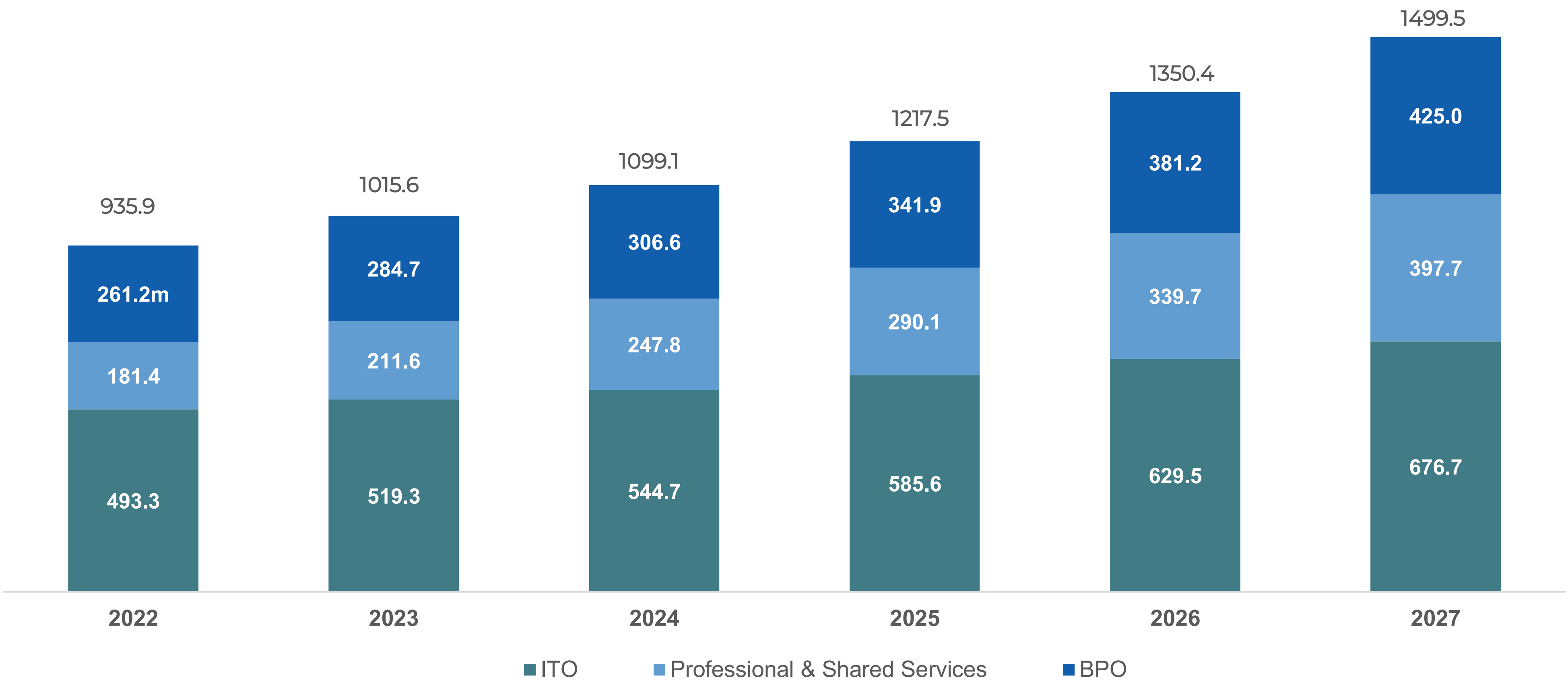
Global and Regional GBS Landscape | Market Growth and Forecasts: Global

The global market for BPO, ITO and Professional & Shared Services was estimated **to be about $1.1 trillion in 2024** and is forecasted to reach almost **$1.5 trillion by the end of 2027 with a CAGR of 8.17%.** By contrast, Africa is expected to grow at a CAGR of 22% in the same period from about $23.8 billion to $42.6 billion.

Estimated Global BPO, ITO and Professional Shared Services Market, 2024 – US$ Billion)

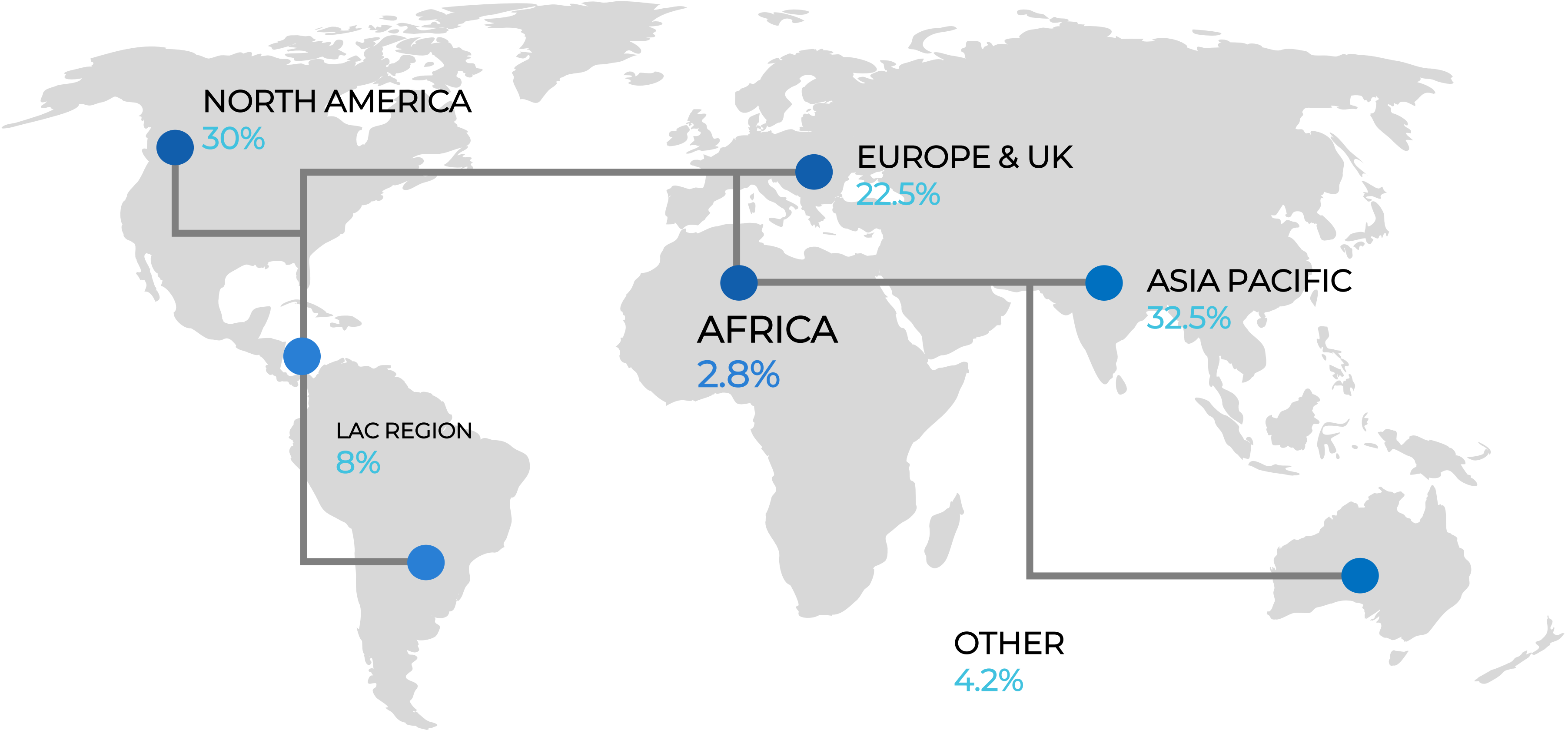


Sources: GBS.World/Genesis GBS, Gartner, Deloitte

Global and Regional GBS Landscape | Market Growth and Forecasts: Global

Notably, the combined global BPO, ITO and Shared Services sector **employs an estimated 43 million people.*** **Africa currently provides only 2.8% (previously 2.5%) of this global workforce.**

Regional Split of Supply-Side Share of Global BPO, ITO and Professional Shared Services, 2024*



**Includes domestic and international onshore and offshore outsourced services*

Sources: GBS.World/Genesis GBS, Gartner, Deloitte

Global and Regional GBS Landscape | Global Key Industry Trends, Drivers and Challenges

The global GBS sector is evolving rapidly; from transactional outsourcing to integrated, digital-first operations. As organisations prioritise agility, digital talent, and value creation, GBS has become a key driver of innovation and operational resilience. This slide outlines global service delivery trends and challenges, particularly relevant to mature and scaled markets..

KEY GLOBAL TRENDS

Integrated and Intelligent Operations

Organisations are moving from siloed functions to end-to-end process integration, leveraging AI, automation, analytics, and cloud platforms to drive efficiency and resilience

Digital Skills and Talent Evolution

Demand for digital skills — including AI, data science, cybersecurity, and cloud computing — is reshaping workforce strategies. Impact sourcing and remote work models are expanding global talent access

Customer and Employee Centricity

GBS units are focusing more on experience — offering agile, personalised services internally and externally

Sustainability and ESG-Driven Services

ESG (Environmental, Social, and Governance) requirements are increasingly embedded in GBS value propositions, influencing location decisions and service delivery models

MAJOR GLOBAL CHALLENGES

Despite growth, the sector faces critical hurdles:

- **Talent Shortages in Digital Domains**: Intense competition for high-end digital skills is driving up wage inflation and attrition, even in traditionally low-cost markets.
- **Automation Anxiety and Organisational Resistance:** Fear of job losses and cultural resistance slow down full-scale adoption of automation and AI-driven models.
- **Fragmented Global Delivery Models & Strategies**: Multi-region delivery is increasingly complex, and Integration of automation, AI, and analytics is often siloed or underutilised.
- **Economic Uncertainty and Budget Cuts:** Inflation, recession fears, and tighter capital expenditure are delaying or scaling down GBS transformation initiatives.

*In the GBS context, **trends are observable shifts** in service delivery models, focus areas, or capabilities—such as integration of AI or ESG-aligned services—while **business drivers are the underlying forces** that compel these changes, including cost pressures, talent scarcity, and regulatory demands.*

Sources: SSON Global Market Report (2024), Deloitte: GBS Talent is Changing(2023), Deloitte Shared Services Survey (2023), Scott Madden: Future Proofing the GBS for 2030,

Global and Regional GBS Landscape | Regional Key Industry Trends, Drivers and Challenges

Post-pandemic digitisation and distributed teams have prompted global businesses to diversify sourcing strategies. In East and Central Africa, countries like Rwanda, Kenya, and Ghana are emerging as stable, cost-effective, and socially impactful hubs. This slide highlights regional trends aligned with Africa's value proposition, including nearshoring, ESG alignment, and inclusive outsourcing.

1. Digital Shift Reshaping Global Demand

Trend: Outsourcing is evolving from transactional tasks to knowledge-intensive services like AI/ML, data science, and cybersecurity.

- **Global Shift:** While India and the Philippines dominate, buyers are exploring niche markets and multi-country strategies.
- **Implications**: Building specialized digital talent pipelines is crucial for providers.
- **Access to Talent:** "Talent availability" is now a top driver of GBS strategy, surpassing even cost pressure and inflation.
- **Relevance to Rwanda**: Rwanda's strong infrastructure and policy support provide a solid foundation, but scaling specialised digital talent remains key to meeting global demand and employer expectations.

2. AI & Automation: Double-Edged Sword

Trend: Technology reshapes jobs, with generative AI augmenting some roles while displacing others.

- **Declining Roles**: Clerical, admin, and data entry jobs are rapidly decreasing.
- **Growing Roles:** High demand for AI Engineers, DevOps, and Cyber Analysts globally.
- **Critical Challenge**: Skills polarization risks excluding those lacking digital readiness from value chains.
- **Complexity and Data Sovereignty**: Tightening regulations around data, cybersecurity, and AI ethics are influencing service design and delivery locations.
- **Upskilling and reskilling** must focus on applied, job-relevant tech skills to meet employer demands.
- **Relevance to Rwanda**: Early AI policy leadership offers niche potential; workforce upskilling and practical adoption remain critical gaps.

3. Geopolitical Realignments & Delivery Diversification

Trend: Global sourcing is fragmenting, with "China+1" and "India+1" models gaining traction.

- **Drivers:** Companies are mitigating risk by expanding to stable, politically neutral locations, driven by trade tensions, IP concerns, and rising wages in traditional hubs.
- **Emerging Models:** Nearshoring, friendshoring, and regional sourcing are on the rise.
- **Strategic Insight**: Emerging destinations like Rwanda, Ghana, and Kenya are well-positioned for multilingual, CX, and niche ITO services.
- **Relevance to Rwanda**: Rwanda's stability and governance make it ideal for firms seeking low-risk, alternative delivery hubs in Africa..

4. From Low Cost to High Value

Trend: Cost advantage remains key, but buyers now prioritize quality, scalability, and social impact.

- **ESG Alignment**: Procurement increasingly focuses on ESG goals like youth employment and gender parity.
- **Buyer Mindset:** Providers are assessed based on impact narratives and talent depth, beyond SLAs and costs.
- **Outcome-Based Models:** 67% of organisations use outcome-based outsourcing, moving away from staff augmentation to value-led delivery.
- **Case for Africa:** Africa's focus on youth employment and ESG makes it a credible partner for value-driven, impact-focused outsourcing.
- **Relevance to Rwanda:** Low costs and bilingual talent attract buyers; higher-value delivery depends on specialised training and management depth.

5. Green & Social Governance in the Sourcing Agenda

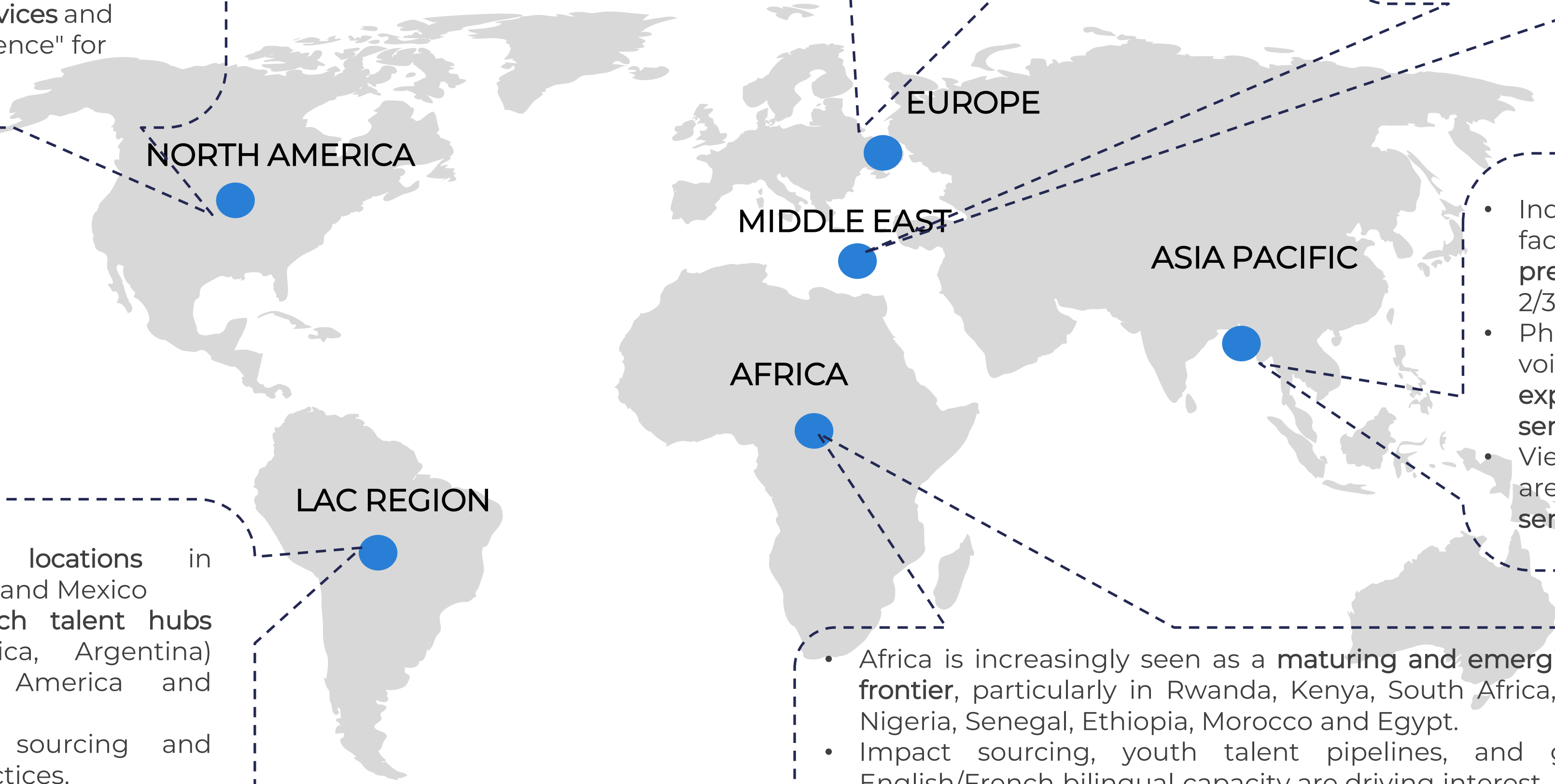
Trend: Green economy and social inclusion are becoming key differentiators in global outsourcing.

- **Client Pressures:** Companies must meet Scope 3 emissions targets and foster inclusive supply chains.
- **Demand Areas:** Rising need for services like climate data, environmental consulting, and energy-tech ITO.
- **Emerging Segment**: "Green-shoring" and "inclusive outsourcing" are now central to sourcing strategies.
- **Relevance to Rwanda:** Rwanda's strong ESG alignment through youth employment, green growth and impact sourcing enhances appeal to conscious global clients.

Source: 1.GBS World Competitiveness Index , 2. MINICT: Ai Readiness and Maturity Framework for Rwanda, 3. WEF: Future of Work (2025)

Global and Regional GBS Landscape | Global Key Industry Trends, Drivers and Challenges

From a regional perspective, the GBS sector reflects distinct shifts in strategy, service focus, and talent models across global markets. Mature hubs are moving toward high-value digital services and automation, while emerging regions like Africa and Latin America are gaining traction due to cost advantages, scalable talent, and strong youth pipelines.



North America

- Strong focus on **nearshoring** to Latin America (Mexico, Colombia) due to talent availability, lower costs, and proximity.
- Increased investment in **AI-driven shared services** and "centres of excellence" for innovation.

Europe

- Mature GBS markets (Poland, Romania, Portugal) are pivoting towards **high-value services**: cybersecurity, AI ops, and digital finance.
- Nearshoring within Europe is rising, driven by geopolitical concerns (e.g., Russia-Ukraine conflict).

Middle East

- Saudi Arabia and UAE are building **domestic GBS capacity** linked to their Vision 2030 diversification agendas.
- Focus on **finance, HR, and IT shared services** to support public sector and energy diversification

Asia Pacific

- India remains dominant but faces **wage inflation** and **attrition pressures**; focus is shifting to Tier 2/3 cities.
- Philippines is repositioning from voice BPO to **digital customer experience** (CX) and **healthcare services.**
- Vietnam, Malaysia, and Indonesia are rising for **tech-enabled services.**

LAC Region

- **Strong CX-BPO locations** in Colombia, Jamaica and Mexico
- Emergence of **tech talent hubs** (Brazil, Costa Rica, Argentina) servicing North America and Europe.
- Growing impact sourcing and diversity hiring practices.

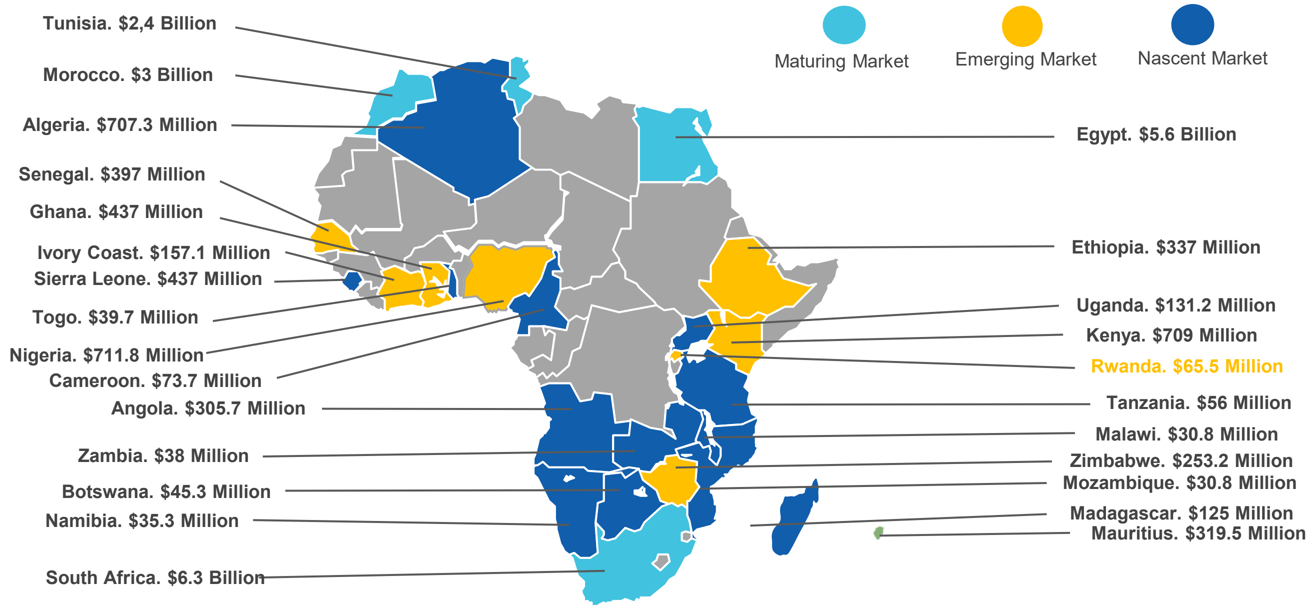
Africa

- Africa is increasingly seen as a **maturing and emerging GBS frontier**, particularly in Rwanda, Kenya, South Africa, Ghana, Nigeria, Senegal, Ethiopia, Morocco and Egypt.
- Impact sourcing, youth talent pipelines, and growing English/French bilingual capacity are driving interest.
- Challenges remain around risk, digital readiness, and perception gaps.

Sources: SSON Global Market Report (2024), Deloitte: GBS Talent is Changing(2023), Deloitte Shared Services Survey (2023), Scott Madden: Future Proofing the GBS for 2030, Africa GBS Benchmarking & Market Data Bank (2025)

Global and Regional GBS Landscape | Market Growth and Forecasts: Global and Africa

Africa is emerging as a serious contender in the evolving global GBS landscape, with untapped, impact-driven markets gaining investor attention. Notably, Rwanda's strategic positioning on the continent is offering boutique, bilingual, and youth-centred delivery capabilities; demonstrates the opportunities and challenges shaping Africa's role in the global sourcing value chain.



Maturing Market: These are locations that have developed domestic IT and business process services markets and have captured offshore work that is more than 40% of total domestic and international market value.
Emerging Market: Locations that have growing domestic markets and have captured offshore work that exceeds 20% of total domestic and international market value.
Nascent Market: Locations that have started capturing some offshore work/or have developing domestic markets.

As global buyers seek nearshoring alternatives and ethically driven delivery models, African nations - particularly smaller, untapped markets - are emerging as serious contenders in the GBS value chain.[1]

Rwanda exemplifies this trend. With the country's GBS sector forecasted to grow at a compound annual rate of between 8.9% and 33% between 2024 and 2030, Rwanda is not only outperforming several regional peers but also positioning itself as an agile, digitally ready, and impact-oriented delivery hub. This **growth trajectory is buoyed by three critical shifts**: the **global search for more resilient** and **diversified outsourcing destinations**, the **rising appeal of impact sourcing** (which aligns with Rwanda's inclusive workforce development goals), and targeted investments in ICT infrastructure and skills development.

Importantly, the decentralisation of GBS delivery from mature hubs like India, the Philippines, and Eastern Europe presents **Rwanda with a strategic opportunity to differentiate**. As buyers increasingly seek cost-effective, bilingual, and socially responsible partners, **Rwanda's narrative around youth employability, bilingualism** (English and French), and **governance stability offers a compelling case.**

However, this opportunity is not without its challenges. Rwanda must accelerate the development of middle and senior management talent, strengthen sector-specific digital competencies, and scale investor onboarding processes to fully capture this momentum. Sustained growth will also depend on how effectively Rwanda can translate global demand into long-term employment and value-added services.

Sources: 1. Africa GBS Benchmarking & Market Report Data Bank (2025) 2. RDB Annual Report (2024), 3. Rwanda ICT SSP 2024-2029, 4. UNDP Leveraging Digitalisation in Rwanda. (2024)

Rwanda is emerging as one of the fastest-growing GBS markets globally, driven by its youth-centred workforce, proactive policy environment, enabling ecosystem, and strong value-led positioning. This slide showcases Rwanda's competitive edge in growth rates and inclusive delivery - while highlighting key challenges that must be addressed to scale in a globalised outsourcing arena.

Domestic & International* GBS Workforces[2]

Rwanda	South Africa	Egypt	Kenya
3,057* *Only international GBS workforce	377,375	325,426	34,846
India	**Philippines**	**Malaysia**	**Jamaica**
5 Million	1.7 Million	200,000	60,000

*Rwanda's edge lies in its **affordability, youth-centred workforce development, proactive government, enabling ecosystem**, and ability to position itself as a test-bed for digital inclusion and social impact hiring.*

Rwanda's rising prominence in the GBS sector, with projected GBS market growth of 8.9% (organic) to 33% (accelerated) between 2024–2030 - among the highest globally. While Rwanda's current sector contribution to GDP is modest at 0.92% and its workforce relatively small (7,708)*, the country is strategically positioned as a **"high-growth, small-scale player."**

Rwanda's appeal lies in its affordability, bilingual youth talent, government-led reforms, and emphasis on inclusive, impact-driven employment. These strengths align with global trends such as AI-driven automation, multilingual service delivery, and ESG-aligned sourcing. The narrative frames Rwanda as a boutique destination, prioritising value-added, socially impactful services over volume-driven models seen in mature hubs like India and the Philippines.

However, challenges remain. Workforce scale, middle-management capability, and specialised digital/ITO skills need strengthening to match demand. Rwanda's ability to scale its GBS infrastructure and deepen its skills pipeline will determine its competitiveness in a crowded market.

Overall, Rwanda is leveraging its reforms and investor facilitation to position itself as a credible, agile delivery hub in Africa. With the right investments in skills and infrastructure, it has the potential to become a regional leader in digitally enabled, inclusive outsourcing.

** The total GBS workforce combines BPO, ITO and Shared Services*

**International GBS workforce are employees in Rwanda's GBS sector delivering outsourced or shared services to international clients or parent companies abroad.*

Source: 1.Statista, 2. GBS.World Africa Benchmarking & Market Report, 3. IMF Datamapper, Rwanda GBS Case Study and Country Report

Global and Regional GBS Landscape | Positioning in the Global and Regional Outsourcing Marketplace

Rwanda is steadily crafting a niche in the global outsourcing market through a combination of sectoral focus, digital readiness, and regional positioning. While its scale is still limited, its proactive reforms, bilingual workforce, and infrastructure reliability create strong foundations for high-potential growth in GBS and tech-enabled services.

1. Sector-Specific Growth and Service Niches

- Rwanda's GBS sector is emerging with over 35 active providers*, underpinned by cross-sectoral collaboration spearheaded by Harambee, GIZ, RDB and MINICT.
- It shows focus in both ITO (IT support, software development) and BPO (data management, call centre support) - matching the global demand for entry-to-mid level services.
- These capabilities support diversification and makes Rwanda more resilient to demand shifts across service verticals.

**Majority of the GBS international providers are indicated in the next section on Rwanda's GBS Sector Overview*

2. Digital and Tech-Driven Service Capacity

- Rwanda is developing digital readiness through cloud computing infrastructure and a young, tech-literate workforce, essential for AI-powered support, analytics, and digital CX.
- The country is also exploring emerging frontiers like blockchain, fintech, and AR/VR, which presents future growth opportunities and relevance to global digital transformation trends.
- Infrastructure reliability (only 29 hours of outages/year) strengthens Rwanda's value proposition for high-availability services.

3. Regional Integration and Expansion Potential

- Rwanda's central location in East Africa and strong physical connectivity through trade routes and air links support regional delivery models.
- It is well-positioned to serve the 300-million-strong East African Community (EAC) market - opening a pathway to become a regional hub for multilingual and regional BPO delivery.
- Rwanda's ranking as 2nd in Africa for ease of doing business enhances its attractiveness to international clients and investors seeking a stable base.

4. Cost Competitiveness and Operational Advantage

- Rwanda's low core operating costs, including electricity, are a distinct advantage in comparison to traditional hubs like South Africa and Kenya.
- This makes it particularly attractive for cost-sensitive digital and tech-driven services, especially during early-stage pilot or scale-up phases.

Unlocking Rwanda's strong foundations for high-potential growth in GBS and tech-enabled services will require deepened service specialisation beyond basic IT and BPO into high-value digitally-enabled verticals.

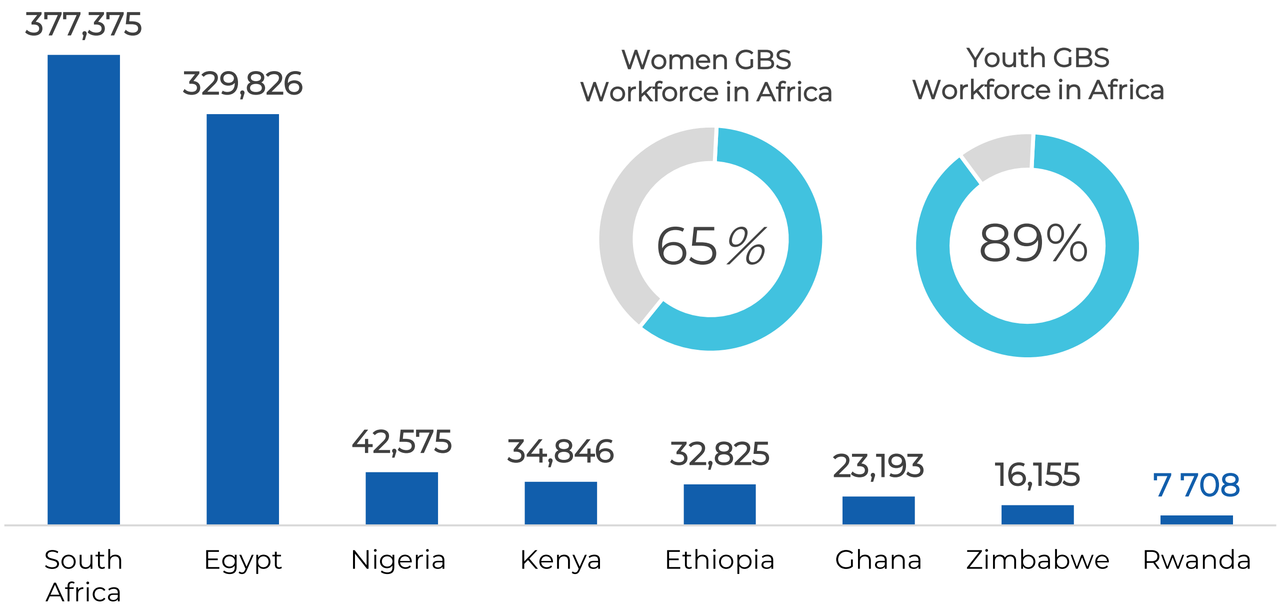
The country will also have to develop cross-border service export capabilities to maximise regional market access.

Sources: 1. Everest Group: Global Location State of the Market (2024); 2. RDB Annual Report (2024), 3. UNDP Leveraging Digitalisation for Transformative Governance in Rwanda. (2024)

Global and Regional GBS Landscape | Rwanda vs. Key African and Global Delivery Markets

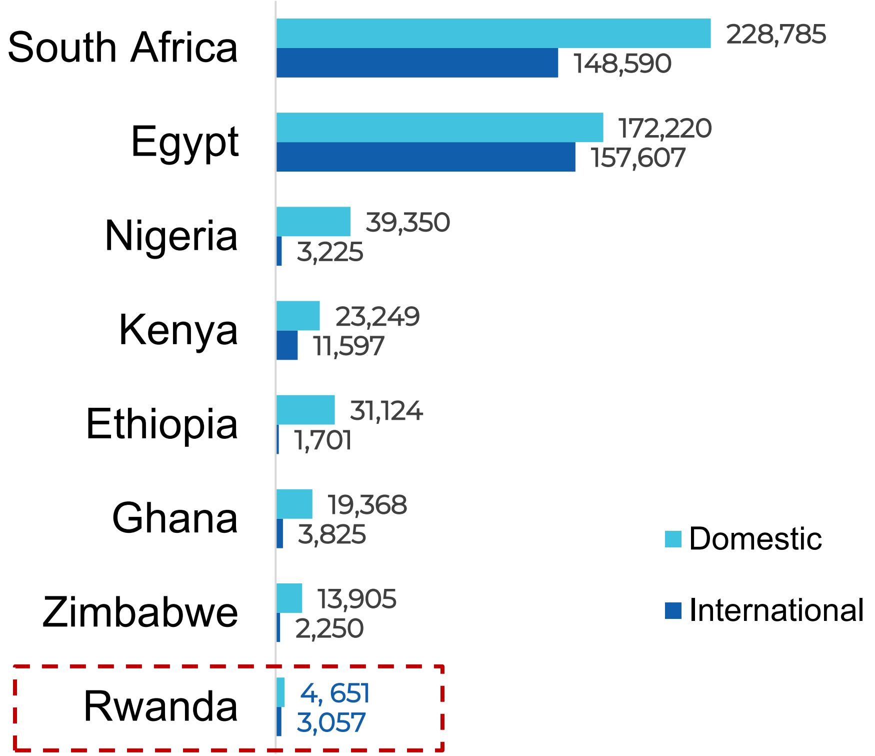
Rwanda is positioning itself as an agile and inclusive GBS hub, with a youthful, gender-diverse workforce that reflects strong potential for impact sourcing. While smaller in scale, its enabling ecosystem offers a high-growth alternative for buyers seeking talent-rich, purpose-driven delivery destinations in Africa.

Rwanda  VS 



Includes domestic and international outsourced and shared services operations

Workforce Numbers in Key African Delivery Markets



Rwanda is among the emerging GBS and ITO/BPO locations in Africa. South Africa employs the estimated largest number of domestic and international GBS workers in Africa, approximately 377,375, followed by Egypt, which employs an estimated 329,826. Nigeria (42,575), Kenya (34,846), Ethiopia (32,825, Ghana (23,192), and Zimbabwe (16,155).

Source: GBS World | Genesis GBS | 2024 Africa GBS Benchmarking and Market Report Data Bank | BPESA Job Reports

Global and Regional GBS Landscape | Competitive Strengths and Areas for Improvement

Powered by ecosystem support, bilingual capability, and cost efficiency, Rwanda is building a strong foundation as a competitive GBS destination. But to truly rise on the global stage, it must bridge critical gaps in communication quality, leadership depth, and international visibility.

STRENGTHS

1. **Ecosystem support** – coordinated efforts and backing among stakeholders,

2. **Policy alignment** – strong government support and strategic focus on GBS.

3. **Bilingual and youthful talent** – availability of English and French-speaking you professionals and youth.

4. **Cost competitiveness** – among the lowest operating costs in the region.

IMPROVEMENTS

1. **Improve English communication quality** – particularly for global service delivery.

2. **Expand middle-management capacity** – to support scale and leadership continuity.

3. **Promote Rwanda's GBS credentials globally** – to improve visibility in sourcing directories.

4. **Build investor confidence** – through active global buyer engagement and branding.

- **Rwanda's strengths are compelling**: a large and youthful population offers scalable workforce potential, particularly vital in an industry driven by labour supply. Strong policy alignment further reinforces the state's commitment to GBS, as seen in initiatives like the Rwanda GBS Growth Initiative and the updated Investment Code. Bilingual talent, particularly in English and French, creates an advantage in servicing both Anglophone and Francophone markets. Additionally, Rwanda's low operating costs make it attractive to cost-sensitive investors, positioning it competitively within Africa.
- However,. **significant constraints undermine the full realisation of these advantages** The quality of English communication, especially for business and technical roles, requires improvement to meet global delivery standards. Middle-management capacity is thin, limiting scalability and leadership continuity- an issue that affects retention, quality assurance, and operational expansion. Rwanda also lacks visibility in global sourcing directories and must build its international GBS brand. Furthermore, it remains at a logistical disadvantage due to its landlocked geography, increasing internet and transport costs compared to coastal competitors like Ghana and Kenya.
- Global peers such as Tunisia and the Philippines provide more aggressive market incentives and have more mature sector ecosystems, reinforcing the urgency for **Rwanda to enhance its international competitiveness**. The proposed improvement areas - enhancing communication skills, investing in leadership pipelines, and global promotion - are therefore critical not only for sector growth but also for investor confidence.

Source: GBS.World Africa Benchmarking & Market Report, 2. UNDP Leveraging Digitalisation for Transformative Governance in Rwanda. (2024)

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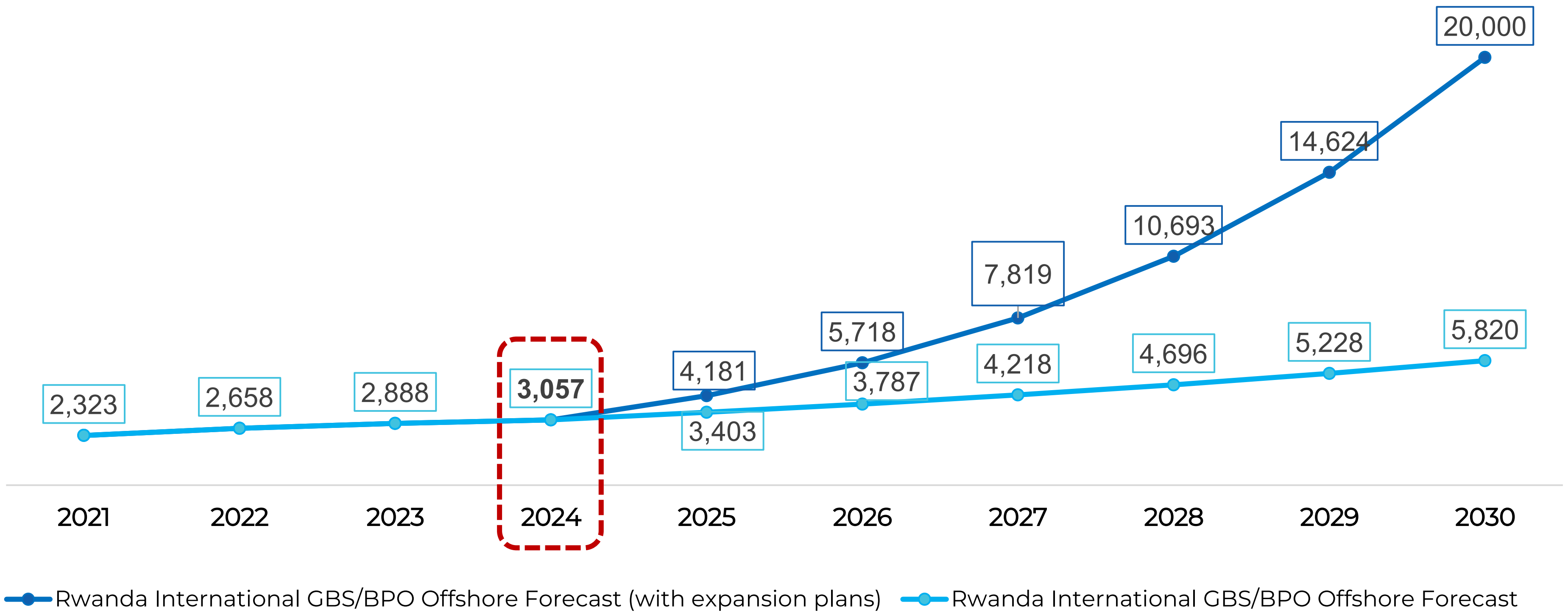
Rwanda GBS Sector Overview | Market Growth and Forecasts: Rwanda

At its current trajectory, Rwanda's international GBS and ITO/BPO workforce **is projected to grow from 3,057 in 2024 to over 5,820 employees by 2030 with a CAGR of 8.9%. However, if the target of 20,000 jobs is achieved by 2030 this would translate into a CAGR of 33.7%.**

Rwanda International* GBS and ITO/BPO Market Forecasts, 2021 - 2030



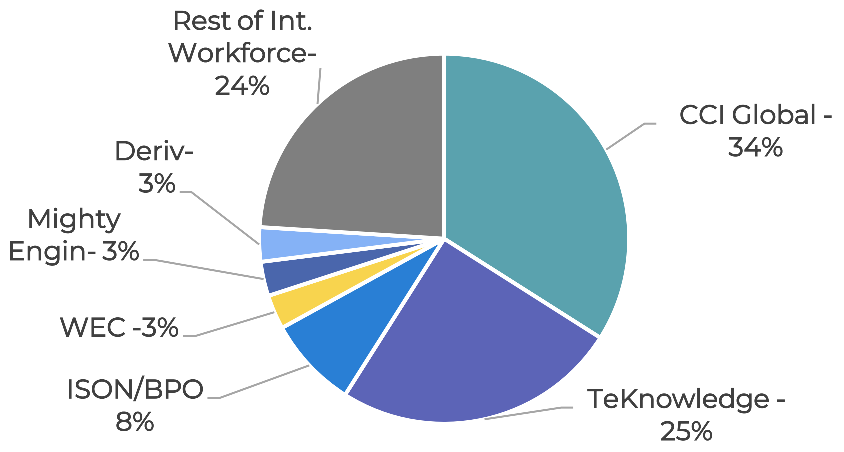
International GBS workforce are employees in Rwanda's GBS sector delivering outsourced or shared services to international clients or parent companies abroad.

Achieving a 33% CAGR to reach 20,000 international GBS and ITO/BPO jobs by 2030 will require targeted and coordinated action across ecosystem players. Key enablers include fast-tracking investor onboarding through continued regulatory reforms, expanding work-ready talent via accelerated skilling pipelines, and enhancing Rwanda's global visibility with a compelling investment promotion strategy. Smart infrastructure, including AI-integrated platforms and reliable connectivity, must continue to scale with demand. Finally, proactive government-private sector collaboration is essential to remove bottlenecks, align on talent demand, and ensure Rwanda is positioned as a strategic, next-gen delivery hub in Africa.

Source: 1. Genesis Global Business Services (GBS)

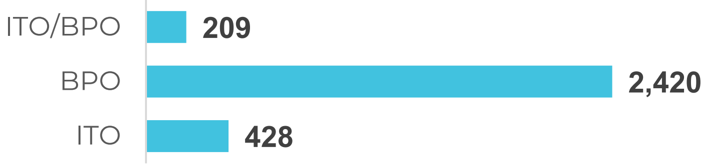
Rwanda GBS Sector Overview | Sector Size, Key Players, and Recent Developments

Rwanda International GBS Operator Market Share by by Workforce Size

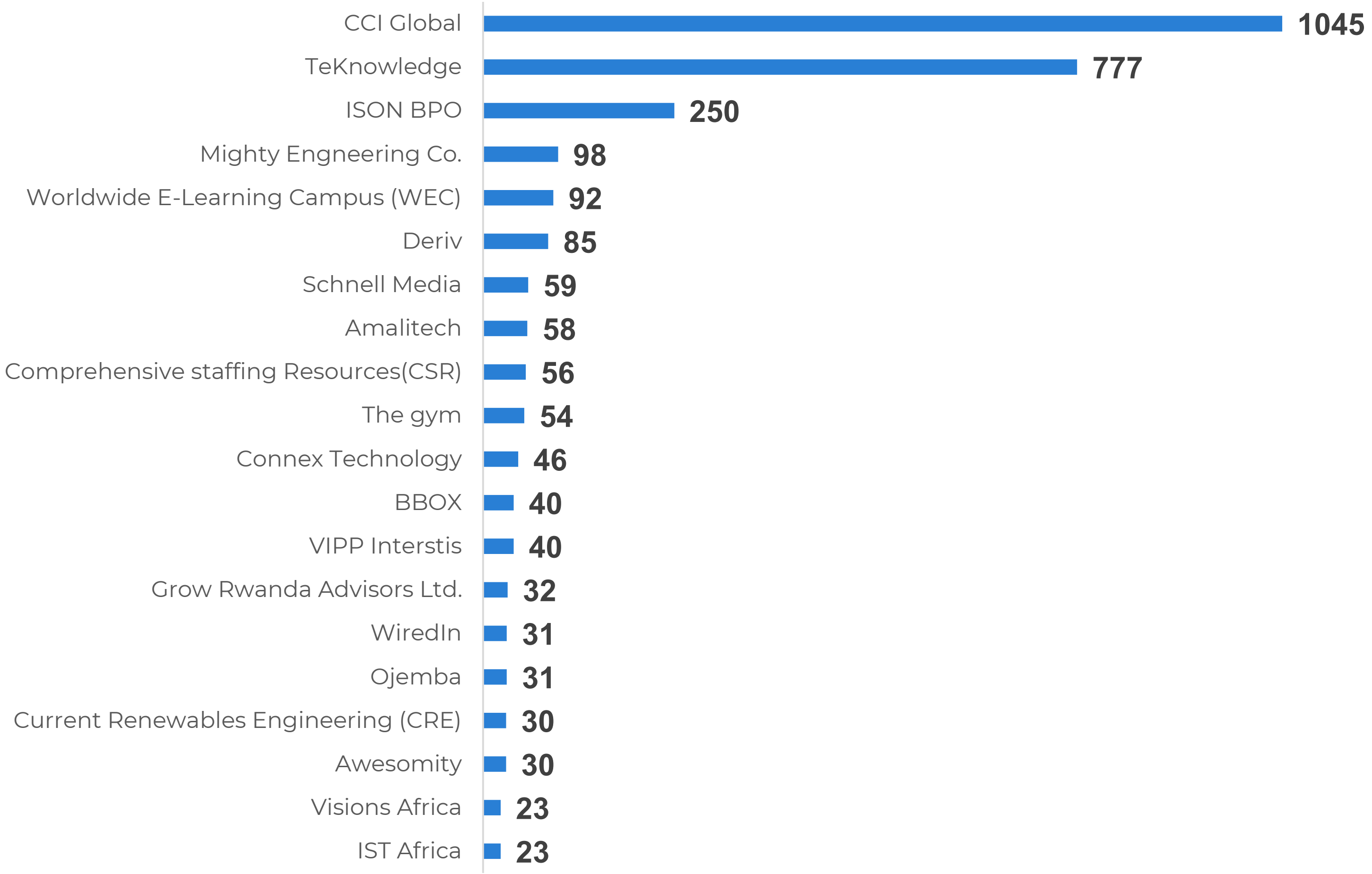


Est. GBS and ITO/BPO Workforce Size in Rwanda (n-value)

Est. GBS Int. Workforce Size by Sector



Top 20 GBS International Operators by Workforce Size



Data from Q2 (April-June 2025)

Source: 2024 Africa GBS Benchmarking & Market Data Bank GBS.World | Genesis GBS | Interviews with GBS and ITO/BPO service providers in Africa

Rwanda GBS Sector Overview | Overview of GBS Services

Rwanda's GBS ecosystem is evolving into a strategically aligned, high-potential delivery hub—underpinned by strong institutions, youth-focused skilling, and growing tech infrastructure. This slide maps the ecosystem's building blocks, from anchor firms and digital investments to policy enablers and inclusive hiring, positioning Rwanda for global service delivery at scale.

Rwanda's GBS Ecosystem

Policy and Institutional
- Rwanda Development Board
- Ministry of ICT and Innovation
- Rwanda GBS Growth Initiative

Funders Enabling the Sector
- Mastercard Foundation
- GIZ
- Invest for Jobs

Talent and Skilling
- Rwanda Coding Academy
- TVET's and Coding Hubs
- Higher Learning Institutions
- Harambee, ALX, Education First
- The GYM, SolveIT
- 1M Coders (NST2 goal)

Digital and Tech
- 4G/5G, SEACOM fibre
- AI readiness programmes
- Data centres, cloud

Global and Regional Service Verticals
- CX (Customer Experience and Contact Centres
- Technical Helpdesk and IT Support (Level 1-2)
- Back Office Processing and Data Management
- Software Development (early-stage)
- Cloud And Digital Infastrcture

Anchor Companies and Operators
- TeKnowledge
- CCI Global
- Deriv
- iSON Xperience
- AmaliTech

Strategic Development Goals
- 20,000 GBS jobs by 2030
- 20,000+ youth skilled
- 3x minimum wage impact on youth
- Inclusive hiring (women, PWD, refugees

Enablers for Investment
- New Investment Code (2023)
- SEZs and Plug-and-Play offices
- VAT/Duty Exceptions for ITO inputs
- 3-day investment registrations

Source: GBS.World Africa Benchmarking & Market Report, 2. UNDP Leveraging Digitalisation for Transformative Governance in Rwanda. (2024)

Rwanda GBS Sector Overview | Overview of GBS Services

Rwanda's GBS ecosystem is evolving into a strategically aligned, high-potential delivery hub, underpinned by strong institutions, youth-focused skilling, and growing tech infrastructure. This slide maps the ecosystem's building blocks, from anchor firms and digital investments to policy enablers and inclusive hiring, positioning Rwanda for global service delivery at scale.

- **Rwanda's GBS ecosystem has rapidly matured from early-stage pilots into a nationally coordinated sector**. Anchored by strong institutional actors - such as the Rwanda Development Board, MINICT, GIZ, Mastercard Foundation and Harambee; the ecosystem benefits from clear policy alignment and developmental intent, as articulated in the Rwanda GBS Growth Initiative. This initiative sets ambitious goals: 20,000 GBS jobs by 2030, over 50,000 youth skilled, and inclusive hiring practices prioritising women and persons with disabilities.
- **Talent and skilling are central pillars,** with TVETs, coding hubs, and youth platforms like Harambee, ALX, and EF targeting national skills transformation. The ecosystem also shows growing digital and tech readiness through investments in 4G/5G, SEACOM fibre, data centres, and emerging AI programmes.
- **Rwanda's GBS offerings span CX, IT support, software development, and cloud services.** Global anchor firms such as TeKnowledge, CCI Global, Deriv, and iSON Xperiences provide delivery credibility. The sector now supports up to 3,057 international jobs across over 35 operators - a significant leap since 2018.
- **Critically, Rwanda's value proposition rests on bilingual talent, low costs, and alignment with European time zones.** Yet, scaling will depend on deeper buyer engagement, visibility in sourcing markets, and continued investment in digital capabilities and leadership talent to meet global delivery standards.

"Rwanda's strategic direction towards digitisation and creating a knowledge-based economy are salient factors leading to its rise as a GBS star." Rwanda GBS Case Study and Country Report (2024)

"TeKnowledge Rwanda grew by 251% in a year, driven by performance culture and a harmonised ecosystem." TeKnowledge Rwanda Case Study

"With foundational pillars in investment promotion, policy advocacy, and skills development, the GBS Growth Initiative is creating the runway for Rwanda to scale into a global delivery market." Rwanda GBS Growth Initiative

Source: GBS.World Africa Benchmarking & Market Report, 2. UNDP Leveraging Digitalisation for Transformative Governance in Rwanda. (2024)

Rwanda GBS Sector Overview | Key Industry Trends, Drivers and Challenges

Rwanda presents a compelling yet still maturing proposition as a GBS destination, underpinned by four foundational pillars: a bilingual workforce, a youthful talent base, proactive government incentives, and increasing digital readiness. However, unlocking full sectoral growth will require addressing persistent scale and specialisation challenges.

Language Capabilities and Client Reach [1]

Bilingual Workforce

30%

Rwandans are **fluent** in at least one **Western language**

Bilingual talent pool proficient in both **English** and **French,** enhancing its appeal to diverse international markets.

Government Incentives [2]

Enhanced investment incentives through Rwanda's New Investment Code have been introduced, applicable to key priority sectors, including ICT and BPO.

5,500 decent jobs by 2025, scaling to 20,000 by 2030

Rwanda Global Business Services Growth Initiative launched in 2023, to position Rwanda as a leading GBS destination

Infrastructure Readiness [1]

"Move-in-Ready Real Estate"

The country offers move-in-ready prime real estate options, facilitating **quick setup** for GBS operations.

Pan-African **tech** and **innovation hub**

Kigali Innovation City

Youthful Demographic

Rwanda offers a **vibrant, skilled** and **adaptable workforce** ready to meet global service demands.

89%

Of the GBS and ITO/BPO Workforce is **youth.**

4.1 Million

Total estimated youth population in Rwanda aged between 18-34.

Four Foundational Pillars of Rwanda's GBS Value Proposition

1. **Language capabilities** - notably bilingualism in English and French - offer Rwanda a niche entry point into diverse international markets, but the limited reach of high-level business language skills may constrain scale in specialised verticals.
2. **The youth demographic** is Rwanda's most strategic long-term asset, offering adaptability and digital potential. Yet, without accelerated skilling pathways and tighter industry-academic linkages, much of this talent remains underutilised within the formal GBS sector.
3. **Recent policy frameworks**, including the Rwanda Global Business Services Growth Initiative and the New Investment Code, reflect strong political commitment. However, effectiveness will hinge on targeted implementation, especially around workforce development incentives and SME support.
4. **In terms of technological readiness**, Rwanda's progress is visible through plug-and-play infrastructure and initiatives like the Kigali Innovation City. Still, connectivity costs, limited tech specialisation, and investor perception gaps could temper short-term competitiveness against more established African peers.

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

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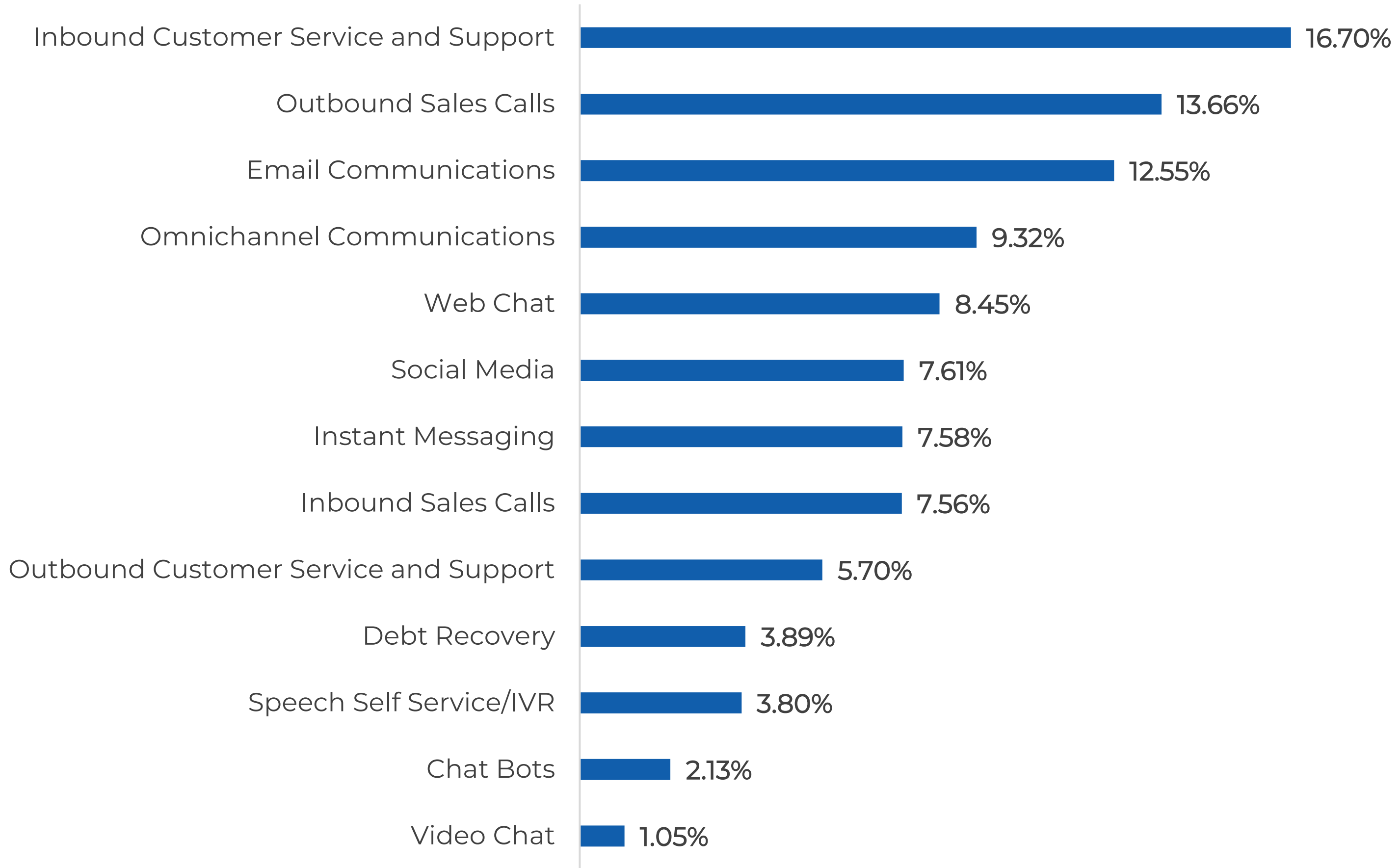
Talent and Workforce Analysis | CX and BPO Service Delivery

Rwanda's CX services are still dominated by voice and email support, revealing a reactive service model. Growth potential in digital, omnichannel, and automated CX delivery - where targeted investments in tech, training, and niche service innovation could unlock scalable, value-added BPO competitiveness.

CX and Contact Centre Services



Percentage of GBS operators that provide the above-mentioned services

The following outlines the current trend in Rwanda's CX service delivery and the possibilities this could have on the BPO sector:

1. Dominance of Voice and Email Support

- Rwanda's GBS offerings are voice-centric and reactive, with growth potential in value-added and multichannel CX services if investments in tech and training are made.

2. Underutilisation of Advanced and Automated CX Tools

- Without embracing automation and AI, Rwanda risks losing competitiveness in a global market increasingly favouring digital-first, scalable, and cost-efficient customer engagement models.

3. Moderate Prevalence of Digital Messaging Tools

- With training and infrastructure upgrades, Rwanda could scale these channels rapidly, offering bundled voice, chat, and social media support to clients looking to consolidate their service delivery.

4. Low Penetration in Niche and Complex Services

- Rwanda must develop sector-specific CX capabilities (e.g., for fintech, telcos, healthcare) to compete with more established BPO markets and move up the value chain.

Source: GBS.World | Genesis GBS Africa Benchmarking and Market Report

Talent and Workforce Analysis | Professional & Shared Services Delivery

When looking at professional and shared services, Rwanda's complex services are IT-led but early in diversifying. Targeted skilling in legal, finance, and research services will drive growth, innovation, and shift Rwanda toward higher-value knowledge process outsourcing.

Specialist GBS and ITO/BPO services delivered from/within Rwanda as indicated in profiling surveys with GBS service providers and internal delivery/shared services centres in the country.

55% — CX and Contact Centre

- Inbound/Outbound Customer Service
- Inbound/Outbound Sales
- Email Communications
- Content Moderation
- Web Chat
- Social Media
- Instant Messaging
- and Support
- Debt Recovery
- Speech Self Service/IVR
- Chat Bots
- Video Chat

20% — IT Outsourcing

- AI integration & support
- Application development/support
- Cybersecurity
- Software development
- Helpdesk technical support
- QA/Software testing
- Image editing
- 3D rendering

10% — Finance & Accounting

- Tax & accounting management
- Internal auditing
- F&A strategy
- Actuarial & technical accounting

6.5% — Legal Services

- Litigation support
- Legal writing
- Legal analysis
- Legal research

3% — Learning Services

- Training scheduling
- Training needs analysis
- Workplace readiness
- Customer experience/service training
- Competency & readiness assessments

3% — Human Resource Management

- Sourcing and recruiting
- Skills assessment
- Executive search & placement
- Expat relocation services
- HR and payroll management

2.5% — Research Services

- Competency & readiness assessments
- Customer experience/service training
- Leadership coaching/training
- Training needs analysis
- Training scheduling
- Workplace readiness

Rwanda's professional and shared services landscape is **anchored in IT outsourcing**, which reflects its strong digital infrastructure and skills investment. However, the limited presence across **mid-to-high-value BPS verticals** such as F&A, legal, and HR signals a sector still in the **formative stage of diversification.**

<u>Priorities for Sector Growth:</u>

- **Develop niche service offerings** in legal, HR, and research through targeted skilling, certification, and market linkage.
- **Build industry vertical specialisation** (e.g., finance BPO for fintech, legal BPO for regional compliance).
- **Promote cross-cutting KPO segments**, particularly in research and analytics, aligned with Rwanda's ambitions for innovation and digital leadership.

Source: GBS.World | Genesis GBS Africa Benchmarking and Market Report

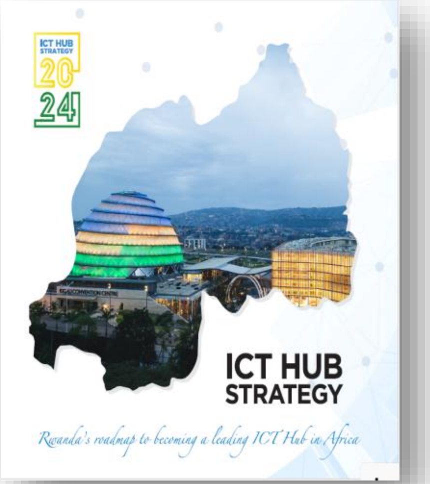
Talent and Workforce Analysis | Digital and ITO Skills Landscape

Rwanda's digital and ITO ambitions are backed by a bold national vision and expanding EdTech innovation - but scaling remains constrained by advanced skills gaps, infrastructure gaps, and weak market linkages. When considering Rwanda's policy strengths, service areas, and ecosystem challenges, there is a need to transition from readiness to competitive, export-oriented growth

1. Strategic Positioning and Vision

Rwanda is ambitiously positioning itself as a leading African ICT and digital innovation hub. The **ICT Hub Strategy 2024** sets out a vision aligned with the **National Strategy for Transformation (NST2)** and aims to:

- Build an IT-skilled workforce
- Foster a national culture of innovation
- Develop advanced technological capabilities in niche areas such as health informatics, e-Government, AgriTech, and digital finance



2. Digital and ITO Services Landscape

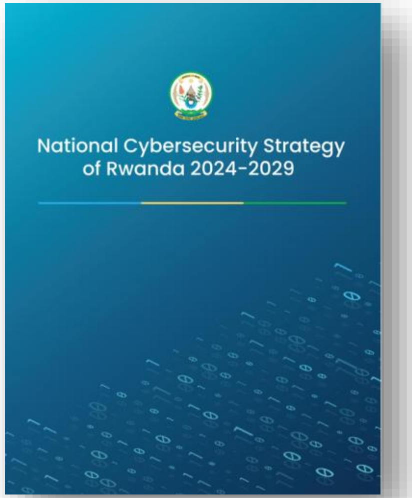
Key Focus Areas:

- Software development
- Platform-based services
- IT-enabled training and workforce platforms
- Infrastructure and connectivity support
- Education management and analytics systems
- AI, data analytics, and cyber security incubation (e.g., Kigali Innovation City)

The **EdTech sector**, which closely overlaps with ITO, illustrates Rwanda's progress in **platform development, content creation, and technical training.** Local skills-focused programmes firms like *Rwanda Coding Academy, She Can Code, The GYM,* and *SolvIT* reflect the current GBS skilling initiatives in Rwanda.

3. Strengths and Enablers

- **Strong political will and policy frameworks** (e.g., Smart Rwanda Master Plan, National Cyber Security Policy, Broadband Policy)
- Fibre-optic infrastructure rollout: Over 7,000 km of national backbone connectivity
- **Broad 4G LTE coverage** with ambitions to boost 5G
- **Pro-business environment** (Rwanda ranks 2nd in Africa for ease of doing business)
- **Digital inclusion priorities** integrated across education, health, and agriculture



4. Current Challenges in the ITO Ecosystem

Despite progress, several gaps limit the scalability and export-readiness of Rwanda's ITO sector:

Digital Skills Gaps	Limited advanced-level digital and coding talent; over-reliance on NGOs for upskilling
Infrastructure Access	Gaps remain in rural connectivity and device access
Funding and Scale	Most firms rely on grants; few have sustainable B2B models or VC investment
Policy Coordination	Fragmented communication between government and private ITO stakeholders
Market Linkages	Local firms lack global exposure or outsourcing integration to large ITO markets

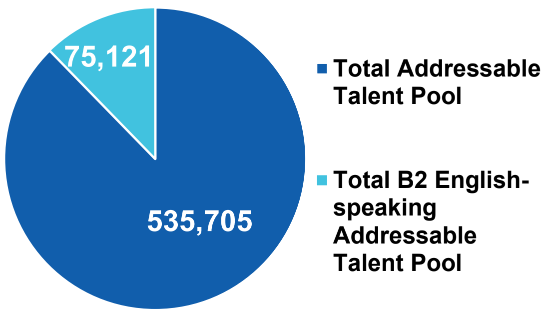
Source: 1. MINICT: Rwanda ICT Hub Strategy (2024), 2. National Cybersecurity Strategy of Rwanda 2024-2029.

Talent and Workforce Analysis | Talent Availability and Scalability

The availability, quality, and adaptability of talent are among Rwanda's strongest competitive advantages in the global services landscape. With a youth-dominant demographic and expanding skilling infrastructure, Rwanda offers a scalable and cost-effective talent pool for GBS operators seeking both customer-facing and technical service capabilities. The country's talent strategy is intentionally designed to serve inclusive economic objectives while responding to global outsourcing trends.

Est. Total and B2 English-speaking Addressable Talent Pools

- Factoring the numbers of qualified unemployed Employee (FTE) growth, Rwanda's total estimated youth (ages 18-35), unemployed graduates and GBS Full-time addressable talent pool is 535,705.
- The total addressable **includes GBS and ITO/BPO** and higher-level job candidates.
- It is estimated that over 75,121 of these candidates are considered to possess a B2 level and higher English-speaking capability, suitable to communicate to international English-speaking customers fluently.



Est. Potential Monthly Ramp-speeds for New Hires

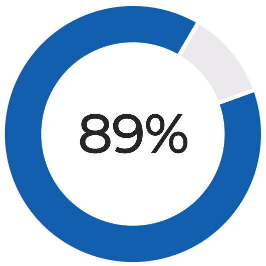
- This is the number of new GBS workers in Rwanda that speak English at a B2 level, which new and existing operators can hire each month over a 36-month period without depleting the B2 English-speaking talent pool in the country.
- Therefore, it is estimated that each month, existing and new GBS operators can hire up to 2,087 B2 English-speaking candidates without depleting the talent pool.
- B2 English proficiency in this context, is in reference to the CEFR (Common European Framework of Reference for Languages)

2,087 Monthly Ramp-speeds for New B2-English speaking Hires

Est. GBS Youth Workforce

- A significant portion of Rwanda's GBS workforce comprise of youth workers that are between the ages of 18-35.
- In fact, an estimated 2,721 of Rwanda's international ITO/BPO workforce are youth.

3,057 Estimated ITO/BPO International Workforce



Make up the estimated ITO/BPO Youth Workforce

Institutional Landscape

40 Higher Learning Institutions (HLIs)

- **31 Universities** (research-based)
- **9 Polytechnics / College** (technical & applied)
- **3 Public HLIs: & 37 Private HLIs:** (Approx. 57% of enrolment)
- **2020-2021 Graduate Output:** Business, Education, and Engineering as top study area = 60% of graduates
- **ICT graduates** = Approx. 8%

Total Annual Graduates

Est. 90,000 Annual Graduates In Rwanda who finish secondary or tertiary education each year,

For GBS employment such as ICT, business and service qualification **Roughly 28,000 Immediately available**

The total addressable talent pool was determined by quantifying the following factors: youth that are unemployed but have a secondary school and tertiary qualification; annual secondary school leavers that enter the labour force but do not immediately find employment; and tertiary education graduates that enter the labour force but do not immediately find employment.

Source: GBS.World | Genesis GBS Africa Benchmarking and Market Report, Rwanda Ministry of Education: 2023/2023 Education Statical Yearbook

Rwanda's multilingual citizens - led by English, French, and Swahili speakers - offers a strong potential for serving diverse global markets.

English

1.5 million

Chinese

1,500

French

826,602

Swahili

2.6 million

Bilingual English/French
400,000

- Language is a **competitive strength.** Rwanda also offers a significant bilingual advantage, with widespread competence in both English and French, positioning the country to serve both **Anglophone** and **Francophone clients.**
- This is especially valuable in attracting nearshore outsourcing from Europe and parts of West Africa.
- While conversational English is common, business communication and elocution training are still required for many candidates to meet global client expectations.

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Foreign language skills and labour market earnings in Rwanda

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ABSTRACT
This paper investigates the extent to which proficiency in English and French as a form of human capital individually determine earnings in Rwanda's labour market and whether it still pays to be bilingual. Using data from the nationally representative Labour Force Survey conducted in 2018, our findings show that after controlling for other human capital and demographic factors, proficiency in both languages is positively rewarded. However, economic returns for proficiency in English language are higher than those for French proficiency and this gap widens from the median to the upper tail of the earnings distribution. Further, in the last two deciles of the earnings distribution, returns to English proficiency surpass returns to bilingual proficiency. A key finding of our study is that proficiency in English is highly rewarded while being bilingual in English and French pays but not in the upper 20% of the earnings distribution. The observed high returns to English language proficiency are likely the outcomes of the language reforms that have been implemented in the country and, most importantly, reflect the history of post-genocide Rwanda. English has become the language of business, government and education, and this trend is likely to continue.

ARTICLE HISTORY
Received 10 March 2021
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KEYWORDS
Bilingual; English; French; human capital; labour market earnings; wage premium; Rwanda

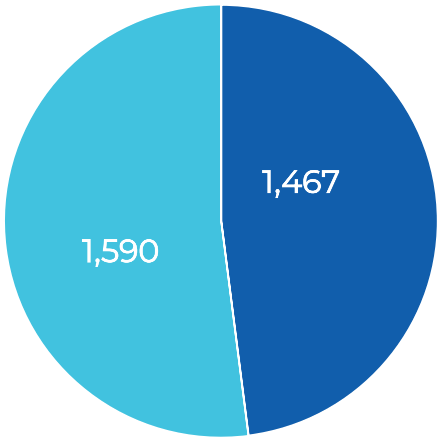
Talent and Workforce Analysis | Gender, Youth, Impact Sourcing and Inclusive Hiring

Inclusivity is a core theme in Rwanda's GBS model. Women represent over 60% of the workforce, and several operators have active hiring programmes for people with disabilities. Initiatives like Harambee's youth accelerator programmes and GIZ's support for marginalized groups help build inclusive pipelines. Rwanda also scores high on impact sourcing, with many employees coming from underserved backgrounds and benefiting from structured support initiatives.

Diversity and Inclusion

- In Rwanda's ITO/BPO sector about 48% of international workers are female, accounting for an estimated 1,678 of the international workforce.

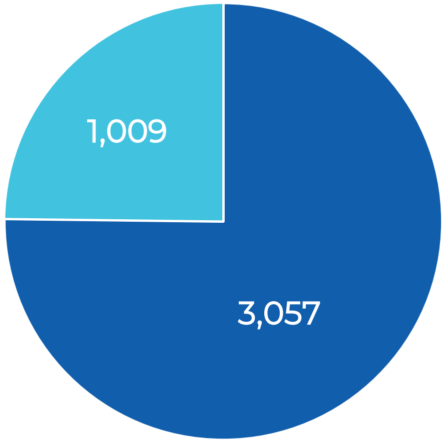
Gender Ratio



Impact Sourcing

- Currently, there are an estimated 1,009 impact sourcing workers in Rwanda's GBS market serving international markets (or about 33% of the total workforce).

Impact Sourcing



To build a globally competitive GBS workforce, Rwanda must focus on:

- Expanding workplace readiness and workplace integration initiatives across the sector.
- Deepening partnerships between universities and GBS operators for real-world curriculum alignment
- Investing in AI readiness, data science skills, and automation resilience training
- Scaling workplace professionalism, coaching, and career mapping to improve long-term retention

The foundations are in place - now the priority is scale, specialisation, and employer-driven alignment.

*In the Rwandan GBS and ITO/BPO ecosystem, **an impact-sourced worker** can be classified as an unemployed or under-employed Rwandan **(primarily youth aged 18-35 in Ubudehe poverty categories C–E, women, persons with disabilities or refugees)** who, through an accredited inclusion programme such as Harambee, GIZ-Invest for Jobs or the Rwanda GBS Growth Initiative, is trained and placed into a formal, entry-level digital or customer-experience role that pays at least the legal minimum wage, offers social protection, and includes a clear skills-development and career-progression pathway* [1]

Source: 1. Fredrich Ebert Stiftung: New Ubudehe Categories, 2. GBS.World | Genesis GBS Africa Benchmarking and Market Report

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Skills Gaps and Future Workforce Needs |
Benchmark of Global High-Demand Services with Rwanda Supply-side Capabilities

Globally, high-demand services include AI/machine learning, cloud engineering, cybersecurity, multilingual CX, and advanced analytics. Rwanda's current delivery capabilities are strongest in technical support, software QA, and CX, with emerging potential in cloud and cybersecurity. However, there is a gap between the global demand for high-value, specialized digital services and Rwanda's current supply-side maturity.[1]

Service Category	Global Demand	Rwanda's Current Fit	Gap/Opportunity
Customer Experience (Contact Centre)	High volume, multilingual, AI-augmented channels	Strong emerging capacity in voice and text channels; French/English bilinguals. Operators like **Moyo** deliver CX for regional and international clients, with a focus on impact sourcing and voice-based support.	Build on early CX delivery by Moyo, to **scale multilingual capacity, introduce AI-augmented CX**, and **pilot omnichannel support** (chat, email, social). High potential for **impact sourcing scale-up**.
IT Support	L1–L3 IT helpdesk, system admin, cloud migration	**TeKnowledge, Tech Affinity**, and Test Solutions offer L1–L2 IT support, with internal upskilling programs underway to grow L3 support. Also includes system admin and remote troubleshooting capabilities.	Expand from L1–L2 to **L3 and infrastructure support** through **cloud certifications (AWS, Azure, CompTIA)**. Support firms like TeKnowledge and Affinity to deliver **regional managed IT services**.
Software Development	Web/app dev, DevOps, agile product teams	A growing base of agile developers from **CMU Africa, Kepler, RCA, SolvIT.** Companies **like Awesomity, Tech Affinity,** and **Test Solutions** deliver mobile/web app development, QA, and agile solutions for African and global clients.	Leverage Awesomity, Tech Affinity, and Test Solutions to grow **agile and DevOps capabilities.** Need to deepen **full-stack training**, support **product-led development**, and link firms to international client delivery chains.
Cybersecurity and Cloud	Cyber threat detection, cloud compliance, network security	Early-stage capacity with some AWS and Azure exposure via **CMU Africa** and **Elev8. TeKnowledge** and **Tech Affinity** are piloting secure cloud deployments and internal certifications in network security.	Strengthen existing pilots via TeKnowledge and Tech Affinity by scaling **certified cybersecurity talent** and **cloud-native security skills.** Create regional delivery hubs for secure IT and cloud ops.
AI and Data Services	Annotation, tagging, model training support, analytics	Nascent but evolving. Early initiatives by **Harambee** and the **AI Readiness Dashboard**. **Moyo** and **Ojemba** show initial capabilities in data labeling, tagging, and local language datasets. Potential to grow via partnerships.	Support Moyo and Ojemba to become **anchor providers** for annotation, NLP, and model training services. Rwanda could position itself as an **AI support hub** for Francophone and regional AI deployment with the right partnerships.
Finance/KPO Services	Bookkeeping, financial modelling, research, payroll, procurement	Some graduates trained in QuickBooks, financial admin, and analytics. **Visions Africa, Ojemba** and **Test Solutions** are exploring pilots in bookkeeping, payroll, and procurement support, but large-scale KPO is yet to materialize.	Formalize pilots by Ojemba and Test Solutions into structured KPO offerings (bookkeeping, payroll). Opportunity to **partner with banks and fintechs** to incubate Rwanda's first full-scale **Finance KPO centre.**

Key Recommendations:

1. **Prioritise ITO Skilling**: Scale Rwanda's tech skilling pipeline in areas like cloud engineering, cybersecurity, and data analytics.
2. **AI Data Services:** Capitalise on Rwanda's multilingual youth and entry-level tech talent for data labelling and AI training work.
3. **Strengthen French Support Capacity**: Grow bilingual capacity to serve Francophone markets (Europe, West Africa).
4. **Move Up the Value Chain:** Expand into KPO (finance, legal) and higher-tier ITO roles (e.g., DevOps, product support).
5. **Leverage SEZs and Incentives:** Offer tailored incentives (VAT exemptions, training subsidies) for firms launching mid-to-high complexity services.

Source: 1. WEF Future of Work Report (2025), 2.. GBS.World | Genesis GBS Africa Benchmarking and Market Report, 3. TeKnowledge: Rwanda Case Study

Skills Gaps and Future Workforce Needs | Existing Skills Gaps and Training Ecosystem

Rwanda's workforce development is advancing, yet critical gaps remain in English proficiency, workplace readiness, technical practice, and managerial talent. These gaps can be bridged with the growing ecosystem of government, private, and industry-led training initiatives working to build a digitally skilled, employable, and future-ready talent pipeline.

Current Skills Gaps

1 English Language Proficiency

Although Rwanda transitioned to **English as the primary language** of instruction, many youth, especially those educated prior to the transition or in under-resourced schools, still **lack sufficient English proficiency for international service delivery roles**

2 Workplace Readiness and Soft Skills

Employers report persistent gaps in **punctuality, communication, critical thinking**, and **workplace professionalism** among young hires. A 2023 survey of 100+ employers found these deficits limit employability, despite improvements in technical skills

3 Practical Technical Skills

Much of Rwanda's ICT training remains theoretical. There is **limited access to practical project experience,** particularly in areas like software engineering, data analytics, and customer support tools

4 Advanced Digital and AI Skills

There is a **shortage of mid-to-senior level technical professionals** and limited expertise in emerging fields such as AI, machine learning, and cybersecurity. Rwanda ranks 10th among African countries in AI readiness, behind more advanced digital economies.

5 Managerial and Supervisory Talent

As the sector scales, demand for **experienced team leaders, trainers,** and **middle managers** is increasing, but the local pipeline is still nascent.

Source: 1. GBS.World | Genesis GBS Africa Benchmarking and Market Report

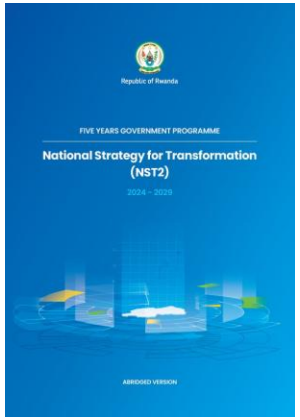
Skills Gaps and Future Workforce Needs | Existing Skills Gaps and Training Ecosystem

Rwanda's workforce development efforts are underpinned by coordinated national strategies and a dynamic ecosystem of public, private, and industry-led initiatives. These actors collectively support the expansion of digital literacy, technical skilling, and inclusive employment pathways across diverse talent groups.

Current Training Ecosystem

A | National and Government-Led Initiatives

- National Strategy for Transformation (NST2): Targets the creation of 1 million coders in five years and increased digital job creation.
- ICT Sector Strategic Plan (2024–2029): Aims to promote digital inclusion and deliver universal digital literacy, with a goal of training 1.5 million citizens in basic and advanced ICT skills.
- Digital Ambassadors Programme: Led by MINICT, this initiative aims to enhance digital literacy, particularly for women, youth, and PWDs in rural areas.



B | Ecosystem and Private Sector Players

- Harambee Youth Employment Accelerator: Harambee focuses on language acceleration and work readiness skilling for youth tailored to the GBS sector. It focuses on inclusive skilling for women, PWDs, and refugees.
- Education First (EF), The GYM, SolvIT, ALX: Act as training providers for foundational and entry-level digital skills, customer support, and coding. EF also provides language skilling.
- Rwanda Coding Academy & Carnegie Mellon University Africa: Provide specialised ICT education, from foundational software skills to postgraduate training in AI, cloud computing, and cybersecurity.
- Innovation Hubs: Institutions like Kigali Innovation City, kLab, and FabLab support entrepreneurial and technical skill development, offering incubation, training, and mentorship.

C | Examples of Industry-Led Models

- TeKnowledge Rwanda: Offers structured in-house technical training and career progression programs including "Level Up" leadership training and "Train-the-Trainer" programmes, enabling internal mobility from Level 1 to Level 2 engineering roles.
- CareerBox Rwanda: In partnership with CCI Global, CareerBox delivers inclusive, demand-led training programmes focused on preparing youth and women for careers in customer service, sales, and digital support roles. The model emphasises employer-aligned skilling, soft skills development, and post-placement support, creating a strong pipeline of entry-level talent for Rwanda's growing GBS sector.

Source: 1. GBS.World | Genesis GBS Africa Benchmarking and Market Report

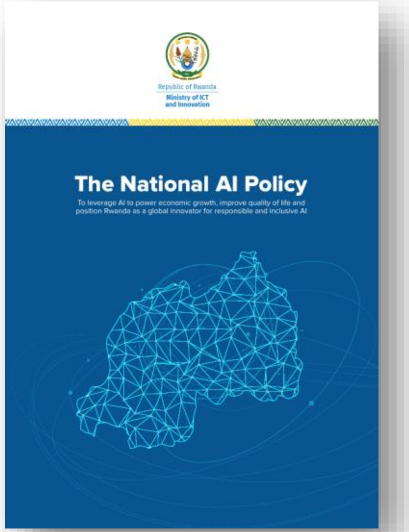
Skills Gaps and Future Workforce Needs | Impact of Automation, AI, and RPA on Skills Demand

Automation and AI present both risk and opportunity for Rwanda's GBS sector. Entry-level tasks face displacement, while demand rises for digital, analytical, and AI-literate skills - highlighting strategic imperatives to future proof Rwanda's workforce through skilling, innovation, and public-private collaboration.

1. Automation and AI as a Double-Edged Sword

Automation and AI are expected to simultaneously create and displace jobs. For Rwanda, which is at the early stages of its GBS/ITO journey, the **initial impact is more likely to augment work** rather than fully automate roles. This is due to:

- Limited AI maturity in Rwanda (AI Maturity Framework.
- Predominantly entry-level digital and CX jobs in the current GBS sector.
- AI adoption still being piloted mainly in government and limited private sector use cases.



2. Skills Most at Risk vs. Skills in Rising Demand

Rwanda's AI Readiness Framework confirms a shortage of AI professionals and data scientists, and limited integration of AI-specific training into university curricula

Declining Skills (Susceptible to Automation)

- **Clerical and routine tasks** (e.g., data entry, basic customer service)
- **Administrative and repetitive back-office functions** (e.g., payroll, record keeping)
- Many of these are common in Rwanda's current CX and BPO operations, putting pressure on rapid upskilling.

Rising Skills (Driven by AI & RPA adoption)

- **Analytical thinking, data interpretation, and problem-solving**
- **Digital fluency and AI literacy**, including use of tools like ChatGPT for productivity
- **Cybersecurity and data privacy knowledge** (driven by increased digitalisation and regulation)
- **Creative thinking and adaptability**
- **Human-in-the Loop (HITL)**, such as managing AI-augmented processes and tools

3. Strategic Implications and

Without an **AI-informed workforce strategy,** Rwanda's GBS sector risks being locked into low-value roles that are more vulnerable to automation.

However, by proactively **building an AI and automation-savvy talent pool**, Rwanda can:

- Shift toward **higher-value ITO services** (e.g., AI operations, prompt engineering, data annotation, cloud management)
- Compete in **emerging digital service niches** like FinTech, AgriTech, EdTech support and remote health diagnostics
- Leverage **impact sourcing and digital inclusion** goals to reskill marginalised groups into future-fit roles

Recommendations for Rwanda

1. **Mainstream AI & RPA modules** into national skilling initiatives (GBS GI, MINICT, Rwanda Polytechnic)
2. **Incentivise private sector co-delivery** of automation training (e.g., TeKnowledge, elev8, CCI)
3. **Create AI-augmented career pathways** in CX, software development, and public services
4. **Launch public-private AI skilling lab**, focusing on hands-on AI use cases for Rwanda
5. **Strengthen AI adoption policy governance** with inclusion of ethical and inclusive employment safeguards

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024), 3. MINICT: AO Readiness and Maturity Framework for Rwanda

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Cost Competitiveness and Scalability | Benchmarks by Sub-Sector: CX and Digital/ITO

Rwanda stands out as one of the most cost-competitive African locations for both CX and Digital/ITO services, offering significantly lower salary ranges across all roles and experience levels compared to peers like Kenya, South Africa, and Nigeria. From entry-level agents to IT managers, Rwanda's affordability makes it an attractive outsourcing destination for companies seeking high-quality talent at reduced operational costs.

Rwanda and Other African Locations

Competitor market contact centre/BPO monthly salary comparisons*

Job Description	Rwanda			Egypt			Ethiopia			Ghana			Nigeria			Kenya			South Africa		
	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
Agent Level Domestic	$147	$196	$306	$198	$264	$413	$75	$95	$148	$143	$190	$297	$135	$180	$281	$252	$336	$525	$367	$489	$764
Agent Level International	$245	$326	$510	$264	$413	$545	$95	$148	$195	$239	$317	$436	$180	$281	$398	$336	$525	$620	$489	$764	$900
Team Leader	$495	$660	$1,031	$437	$583	$911	$150	$200	$313	$540	$720	$1,125	$300	$400	$625	$629	$838	$1,309	$625	$833	$1,302
Operations/ CC Manager	$1,048	$1,398	$2,184	$742	$989	$1,545	$270	$360	$563	$1,011	$1,348	$2,106	$525	$700	$1,094	$1,102	$1,469	$2,295	$1,633	$2,177	$3,402
QA/Coach	$437	$582	$910	$395	$527	$823	$98	$130	$203	$392	$522	$816	$248	$330	$516	$491	$654	$1,022	$528	$704	$1,100

*Gross monthly salary

Competitor market digital/ITO monthly salary comparisons*

Job Description	Rwanda			Egypt			Ethiopia			Ghana			Nigeria			Kenya			South Africa		
	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
IT Help Desk Agent	$356	$475	$743	$291	$388	$606	$98	$130	$203	$326	$435	$681	$203	$270	$422	$316	$421	$658	$501	$645	$1,008
Technical Support Specialist	$430	$573	$895	$413	$550	$859	$113	$150	$234	$415	$553	$864	$248	$330	$516	$426	$568	$888	$565	$753	$1,176
Software Developer	$741	$988	$1,544	$461	$614	$959	$248	$330	$516	$659	$878	$1,372	$330	$440	$688	$852	$1,136	$1,775	$1,472	$1,962	$3,066
Data Analyst	$600	$801	$1,251	$386	$515	$805	$165	$220	$344	$504	$673	$1,051	$300	$400	$625	$590	$787	$1,230	$1,278	$1,704	$2,663
IT Manager	$1,177	$1,569	$2,451	$768	$1,024	$1,600	$300	$400	$625	$1,477	$1,969	$3,076	$638	$850	$1,328	$1,516	$2,021	$3,158	$2,419	$3,226	$5,040

*Gross monthly salary

Source: GBS.World | Genesis GBS Africa Benchmarking and Market Report

Cost Competitiveness and Scalability | Benchmarks by Sub-Sector: CX and Digital/ITO

Rwanda continues to demonstrate strong global cost competitiveness across CX and Digital/ITO roles, offering some of the lowest monthly salary ranges compared to key offshore destinations like Jamaica, the Philippines, Malaysia, and Poland. With entry-level agent (international) roles starting at just $245 and senior IT Manager salaries at $2,451, Rwanda presents a compelling value proposition for companies seeking to balance talent quality and cost efficiency in their outsourcing strategies.

Rwanda and Global Locations

Competitor market contact centre/BPO monthly salary comparisons

Job Description	Rwanda			India			Jamaica			Malaysia			The Philippines			Poland		
	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
Agent Level Domestic	$147	$196	$306	$178	$237	$370	$330	$440	$688	$425	$567	$886	$255	$340	$531	$446	$595	$930
Agent Level International	$245	$326	$510	$220	$344	$417	$440	$688	$780	$567	$886	$1,384	$340	$531	$735	$595	$930	$1,453
Team Leader	$495	$660	$1,031	$368	$491	$767	$504	$672	$1,050	$923	$1,230	$1,922	$533	$710	$1,109	$855	$1,140	$1,781
Operations/CC Manager	$1,048	$1,398	$2,184	$582	$776	$1,213	$1,016	$1,354	$2,116	$1,575	$2,100	$3,281	$1,000	$1,333	$2,083	$2,100	$2,800	$4,375
QA/Coach	$437	$582	$910	$263	$350	$547	$377	$502	$784	$826	$1,101	$1,720	$446	$595	$930	$830	$1,106	$1,728

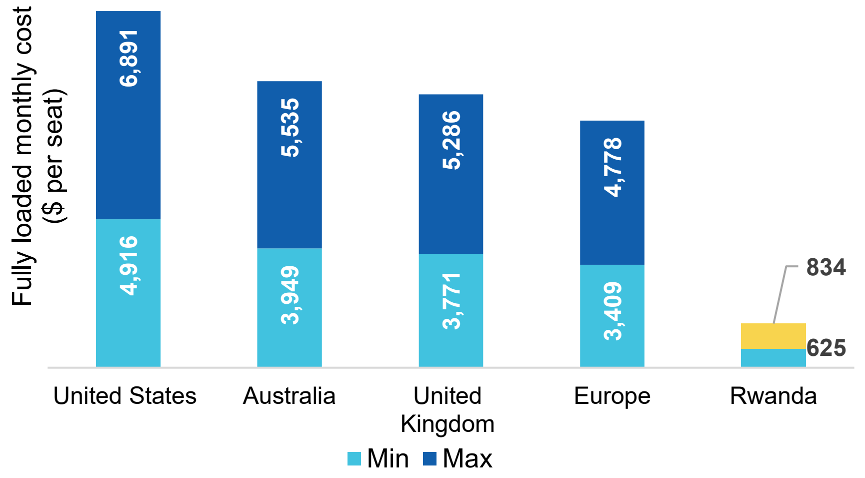
Competitor market digital/ITO monthly salary comparisons

Job Description	Rwanda			India*			Jamaica*			Malaysia*			The Philippines*			Poland*		
	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
IT Help Desk Agent	$356	$475	$743	$225	$273	$427	$481	$508	$794	$761	$1,014	$1,584	$383	$511	$798	$731	$975	$1,523
Technical Support Specialist	$430	$573	$895	$260	$346	$541	$388	$517	$808	$860	$1,146	$1,791	$424	$565	$883	$844	$1,125	$1,758
Software Developer	$741	$988	$1,544	$385	$513	$802	$644	$858	$1,341	$1,139	$1,519	$2,373	$587	$783	$1,223	$1,141	$1,521	$2,377
Data Analyst	$600	$801	$1,251	$366	$488	$763	$509	$678	$1,059	$1,025	$1,367	$2,136	$529	$705	$1,102	$1,074	$1,432	$2,238
IT Manager	$1,177	$1,569	$2,451	$585	$780	$1,219	$1,263	$1,684	$2,631	$1,433	$1,911	$2,986	$1,066	$1,421	$2,220	$2,199	$2,932	$4,581

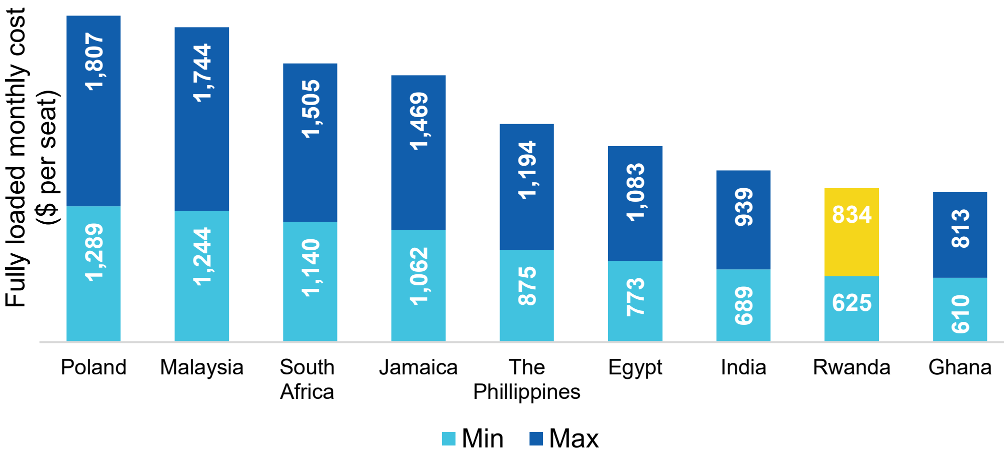
Source: GBS.World | Genesis GBS Africa Benchmarking and Market Report

Cost Competitiveness and Scalability | OPEX vs. African and Global Competitor Markets

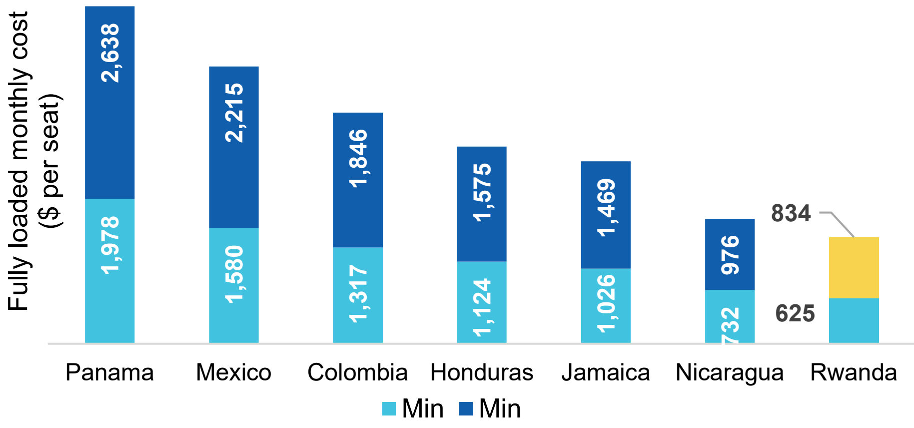
Fully loaded (FTE) Source Market contact centre monthly costs comparison (USD, per seat, est.)



Fully loaded (FTE) Competitor Market contact centre monthly costs comparison (USD, per seat, est.)



Fully loaded (FTE) contact centre monthly costs comparison with U.S. nearshore locations (USD, per seat, est.)



Rwanda Fully Loaded (OPEX) Cost Breakdown | Contact Centre

Cost Component *(As a % of total fully loaded cost range for Rwanda: $625 - $834)*	Percentage Range
• Base Salary (Gross)	50% - 60%
• Benefits & Statutory Contributions (pension, health insurance, social security)	8% - 12%
• Transportation Costs (night shift shuttles, allowances)	5% - 8%
• IT & Equipment Costs (PC, headsets, telephony, software licences)	5% - 7%
• Facilities & Utilities (office space, electricity, water, internet)	4% - 6%
• Administrative & HR Costs (payroll processing, HR support, recruitment)	3% - 5%
• Operational Support & Management (team leads, supervisors, QA support)	8% - 12%
• Other Operational Costs (training, attrition replacement, compliance, miscellaneous)	2% - 5%

Rwanda is among the most cost-effective contact centre destinations globally, beating even top offshore (India, Philippines) and nearshore (Mexico, Colombia) competitors,

But **low OPEX alone is not enough**. To attract and retain international BPO investors, Rwanda must invest in:

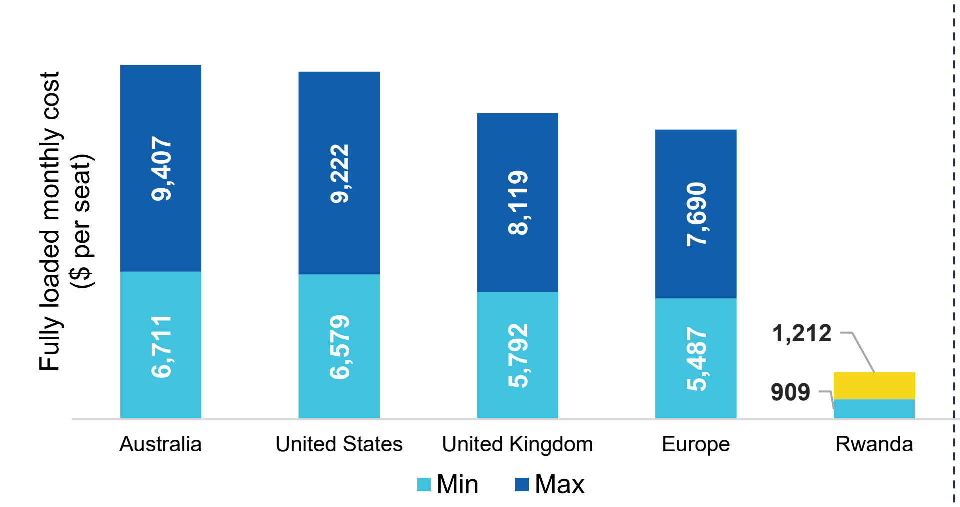
- **Skills development** (especially in CX, sales, and tech support).
- **Service quality**, scalability, and industry certifications (ISO, PCI-DSS, etc.).
- **Digital infrastructure** and multilingual workforce capability.

Positioning Rwanda as a **cost-efficient, digitally-ready, and impact-sourcing compliant destination** will enhance its long-term competitiveness beyond the "low-cost" label.

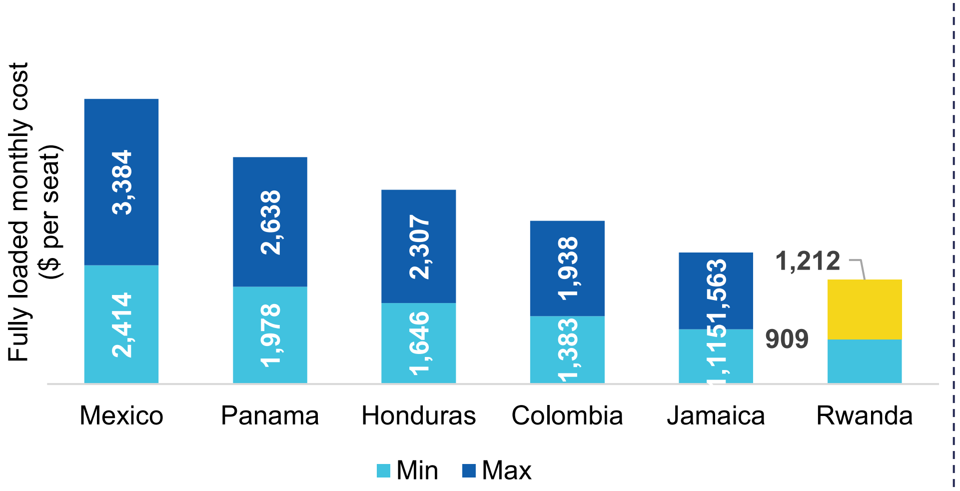
Source: GBS.World | Genesis GBS Africa Benchmarking and Market Report

Cost Competitiveness and Scalability | OPEX vs. African and Global Competitor Markets

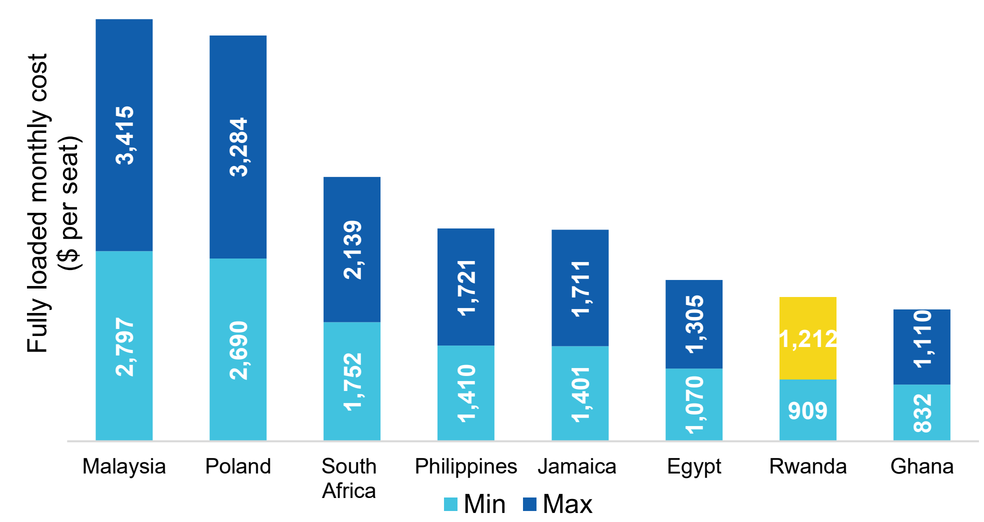
Fully loaded (FTE) Source Market digital/ITO operation monthly costs comparison (USD, per seat, est.)



Fully loaded (FTE) digital/ITO operation monthly costs comparison with U.S. nearshore locations (USD, per seat, est.)



Fully loaded (FTE) Competitor Market digital/ITO operation monthly costs comparison (USD, per seat, est.)



Rwanda Fully Loaded (OPEX) Cost Breakdown | Digital/ITO

Cost Component *(As a % of total fully loaded cost range for Rwanda: $909 - $1,212)*	Percentage Range
• Base Salary (Gross)	55% - 65%
• Benefits & Statutory Contributions (pension, health insurance, social security)	8% - 12%
• Transportation Costs (night shift shuttles, allowances – if servicing overseas markets)	4% - 6%
• IT & Equipment Costs (high-spec PCs/laptops, headsets, telephony, software licences, cybersecurity tools)	6% - 9%
• Facilities & Utilities (office space, electricity, water, internet)	3% - 5%
• Administrative & HR Costs (payroll processing, HR support, recruitment)	2% - 4%
• Operational Support & Management (team leads, supervisors, quality assurance, technical escalation support)	8% - 10%
• Training & Certification Costs (technical training, software certification, upskilling)	3% - 5%

Rwanda offers a compelling cost advantage for digital and ITO operations, outperforming major offshore (Poland, Philippines) and nearshore (Mexico, Colombia, Jamaica) hubs, as well as high-cost mature markets like the US, UK, and Europe. However, sustaining investor interest requires more than low operating costs.

Strategic priorities should include:

- **Developing high-demand skills** in software development, cloud, data analytics, and cybersecurity.
- **Enhancing quality assurance** and adherence to international standards (ISO, SOC 2, etc.).
- **Strengthening digital infrastructure** and fostering innovation ecosystems.
- **Creating scalable pathways** for specialised tech talent and high-value, next-generational services.

Source: GBS.World | Genesis GBS Africa Benchmarking and Market Report

Cost Competitiveness and Scalability | Wage Inflation and Attrition

Rwanda's low labour costs are a key competitive edge, but wage inflation and attrition pressures are rising—especially for skilled, bilingual talent. This slide outlines the drivers, risks, and policy/employer actions needed to manage churn, stabilise wages, and build long-term workforce retention through structured progression and targeted incentives.

Wage Inflation: Current State and Emerging Pressures

A. Rwanda's Current Labour Cost Position	B. Drivers of Wage Pressure	C. Strategic Implications
• Rwanda's average GBS **monthly wage for domestic intermediate CX roles is $147–196,** significantly lower than Kenya, Ghana, and South Africa. • Entry-level wages are approximately **3× higher than Rwanda's living wage benchmark,** which helps attract youth into formal GBS work.	• **Rising cost of living and inflation** (global and local) is likely to drive upward pressure on wages, particularly in urban Kigali where most GBS jobs are located. • Increased **competition for skilled bilingual (English/French) talent;** especially those with digital and managerial competencies is likely to push employers toward **premium wage offers**. • Global demand for remote workers in **tech-enabled support roles** may lead to "wage arbitrage compression" as Rwandan talent is hired directly by foreign employers at higher rates.	• Rwanda's low-cost positioning is an initial asset but could erode if wages rise faster than productivity gains. • Wage inflation may **expose skill scarcities** in mid-level roles (e.g., L2 technical engineers, team leads), as firms compete for limited experienced talent.

Attrition: Trends and Sector-Specific Drivers

A. Rising Attrition Concerns	B. Underlying Factors	C. Impact on Skills Ecosystem
Attrition in Rwanda's GBS sector is **beginning to rise**, especially among high-performing employees who are: • Poached by competitors • Leaving for **higher-paying remote work** or freelance tech roles • Moving out due to **workload stress or limited career progression.** Some operators report up to **60% of original hires advancing or exiting** within 12–18 months.	• **Lack of structured career mobility** (only a few employers like TeKnowledge offer L1→L2 pathways) • **Insufficient non-wage incentives** (e.g. leadership development, training stipends, flexible work options) • **Limited availability of middle-management roles** to absorb growing ambition	High attrition leads to **constant churn in entry-level roles,** increasing the need for: • Scalable, employer-aligned skilling programmes • Continuous onboarding and training costs • Redundancy in GBS team structures to maintain service levels

Policy and Employer-Level Recommendations

A. Policy

- Encourage **employer-led wage transparency** to stabilise market expectations
- Introduce **wage benchmarking frameworks** tied to job complexity and sector positioning
- Co-invest in **talent retention schemes** such as subsidised housing, training stipends, or flexible childcare options

B. Employer Practice

- Introduce **stay interviews and exit analytics** to understand why talent leaves
- Create **career progression roadmaps** for GBS agents (e.g., L1 → L2 → Trainer → Team Lead)
- Launch **employee development portfolios** (e.g., sponsored microcredentials) as retention tools
- Explore **employee stock ownership or long-term incentives** for senior technical roles

Source: GBS.World | Genesis GBS Africa Benchmarking and Market Report

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Market Demand and Growth Opportunities | Regional and International Market Niches Suited to Rwanda

As global sourcing strategies evolve, Rwanda is uniquely positioned to serve high-value, niche markets across both regional and international arenas. The rise of ESG-conscious procurement, digital offshoring, and nearshoring diversification has created fresh demand for agile, impact-driven delivery locations.

Market Segment	Global Trend 	Rwanda's Strategic Fit 
1. Africa Regional Back Office	Intra-Africa nearshoring & AfCFTA integration	Bilingual (EN/FR), strategic location, low cost, regional trade access
2. Europe/UK ESG & Social Impact Buyers	ESG-aligned procurement & impact sourcing prioritisation	Inclusive hiring, youth employment focus, strong impact sourcing narrative
3. European SME ITO (Germany, Nordics)	Shift to boutique, agile tech support hubs outside traditional outsourcing giants	Boutique model, low attrition, proven ITO delivery (e.g. TeKnowledge)
4. Francophone Markets (Canada, Belgium, West Africa)	Under-served demand for French bilingual support staff	B2 French talent pool, competitive salaries, scalable bilingual delivery
5. Development Sector & Multilaterals	Donor agencies shifting ops to Global South for cost and localisation benefits	Stable governance, Kigali as secure hub, strong partnerships (GIZ, UNDP, Mastercard)
6. EdTech & Online Learning Providers	Global surge in online education & need for multilingual learner support	Digitally literate youth, English/French skills, strong local education & training pipeline

- Rwanda's core strengths - **bilingual youth talent, political stability,** and **inclusive hiring ecosystems** - align with these emerging trends.
- From **Africa-based back-office services** to **Francophone support**, and EU/**UK impact sourcing**, Rwanda can offer a compelling proposition to buyers seeking **cost-efficiency without compromising quality, purpose, or trust.**
- With focused positioning in segments like **development services**, **edtech support**, and **boutique ITO for SMEs**, Rwanda has the potential to grow into a **boutique outsourcing hub** delivering both economic and social returns.

Source: 1.GBS Competitive Index , 2. MINICT: Ai Readiness and Maturity Framework for Rwanda, 3. WEF: Future of Work (2025)

Market Demand and Growth Opportunities | Opportunities in Key Vertical Industries like Financial Services, Retail, Tech, etc.

The GBS sector in Rwanda is well-positioned to tap into several high-potential vertical industries. These industries present attractive growth opportunities due to Rwanda's unique value proposition, including a young, tech-savvy workforce, bilingual capabilities, cost competitiveness, and strategic government backing.

Vertical Industry	GBS Opportunity Areas	Strategic Rationale
Financial Services	Customer support, fintech support, KYC/BPO processes, regtech, fraud prevention	High growth in Rwanda's fintech ecosystem, regional banking expansion, and demand for financial inclusion services
Technology & Software	Helpdesk, application support, software QA/testing, cloud & IT support, data annotation	Rwanda hosts operators like TeKnowledge; strong STEM pipeline and ICT policy alignment with AI and digital skills development
Healthcare & Life Sciences	Medical coding, billing support, data entry, health informatics, telemedicine support	Growth in digital health, public health reforms, and increasing interest in healthcare outsourcing in emerging markets
Retail & E-Commerce	Omnichannel CX, logistics back-office support, order management, chat support	Expanding regional e-commerce, mobile penetration, and rising youth consumer base
Telecoms	Technical support, provisioning, billing and collections, CX and loyalty management	Telco expansion across East Africa and demand for scalable multilingual customer service hubs
Education & EdTech	Online tutoring support, LMS tech support, content moderation, digital learning services	Demand for digital learning platforms in Sub-Saharan Africa and Rwanda's youth-skilling ambitions
Agriculture & AgTech	Data services, remote sensing support, agri-fintech customer service, value chain analytics	Agriculture remains a national priority; digitalisation of agribusiness is increasing
Public Sector & e-Government	Data digitisation, citizen support centres, records management, e-services back-office	Rwanda's investment in e-governance and smart government systems (e.g., Irembo portal) drives demand
Green Economy & Climate Tech	Support services for energy platforms, climate data processing, ESG compliance support	Alignment with Rwanda's green growth agenda and climate-smart development policies

- Rwanda's emerging status as a **"boutique service hub"** offers value to niche, high-impact verticals, especially where cost, impact sourcing, and bilingualism are critical.
- Investment in AI and digital transformation underlines growing opportunities in **tech-enabled and data-driven verticals**.
- Alignment with ESG and inclusive growth goals makes Rwanda attractive for **impact-driven outsourcing**, especially in sectors like health, education, and green tech.

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

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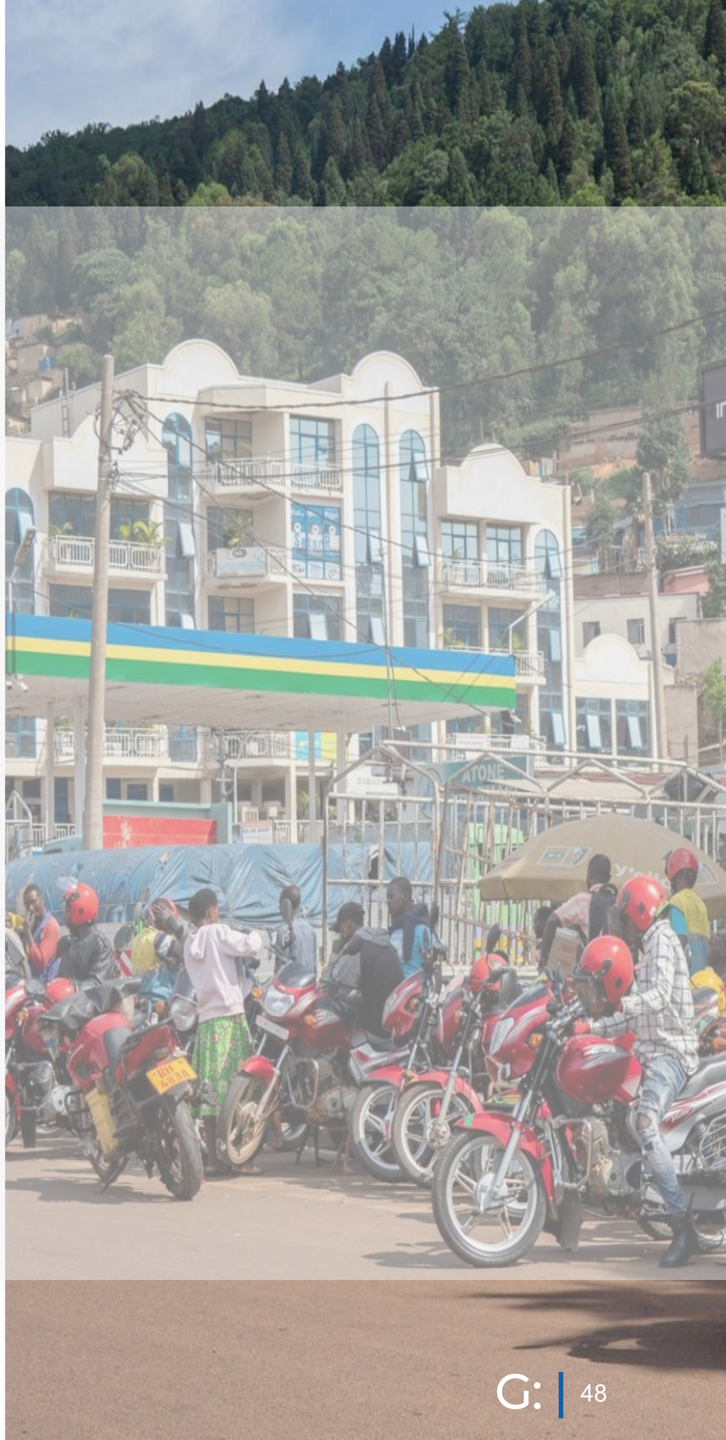
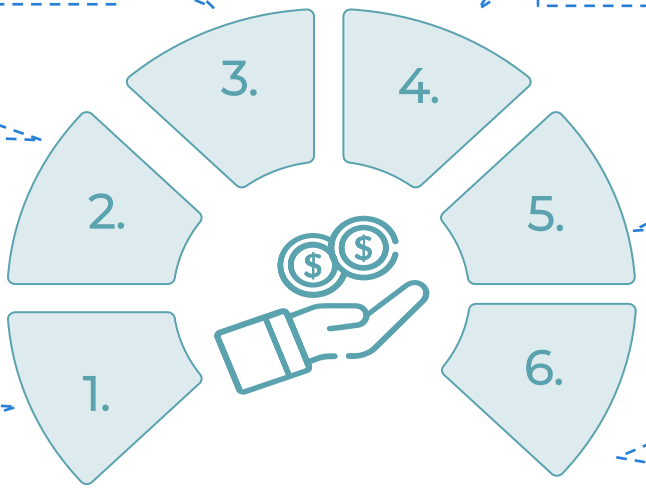


Enabling Environment and Infrastructure | Support and Incentives for the GBS Sector

Rwanda offers a highly supportive environment for GBS investors - combining strong political alignment, inclusive workforce policies, and competitive fiscal incentives. Keybenefits such as tax holidays, VAT exemptions, and tailored support for early entrants, reinforce Rwanda's reputation as a stable, impact-driven, and investment-ready GBS destination.

Key Investment Incentives



1. Special packages for ICT firms, including duty-free importation of equipment.
2. Prompt value-added tax refunds to enhance cash flow.
3. 50% depreciation allowance in the first year for capital expenditures.
4. 0% corporate income tax for investments exceeding $50 million with a 7-year tax holiday.
5. Full exemption for qualifying investments.
6. Tailored incentives for early entrants in the BPO market and priority industries.

Attractive Investment Incentives

- The Investment Code offers tax holidays, VAT/customs exemptions, and One Stop Centre support, with benefits for GBS firms importing ICT equipment.

Insight: Incentives are regionally competitive but could be enhanced with performance-based rewards.

Institutional Coordination and Sector Promotion

- The Rwanda GBS Growth Initiative coordinates skills, investment, and sector growth, with GBS classified as a "high-urgency, high-impact" sector.

Insight: Rwanda's agile support framework is advancing but needs further ecosystem infrastructure scale-up.

*Rwanda consistently ranks among the **top countries in Africa for ease of doing business**. According to the inaugural World Bank B-READY report (2024),*

*Rwanda was ranked **1st in Africa** across all three business pillars and placed in the top **10 globally for all 10 indicators**. This includes business registration, regulatory transparency, and operational efficiency (World Bank, 2024).*

*The **New Investment Code** (2015, updated in 2021) offers a range of tax and non-tax benefits to registered GBS operators*

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

Enabling Environment and Infrastructure | Digital and Physical Infrastructure

Rwanda's digital and physical infrastructure is advancing rapidly, with strong policy alignment, nationwide 4G, modern SEZs, and e-governance platforms. When comparing Rwanda's strengths - such as the Kigali Innovation City and Irembo - with ongoing challenges like cloud limitations, rural disparities, and landlocked cost constraints, several factors become apparent,

Digital Infrastructure

Strengths

- **Policy Alignment:** Rwanda's ICT and AI policies are tightly aligned to national transformation goals, supporting digital economy growth and GBS expansion.
- **Connectivity:** Nationwide 4G coverage and 700 km fibre backbone offer strong digital infrastructure, with undersea cable access via Tanzania and Kenya.
- **Digital Platforms**: E-governance platforms like *Irembo* and *IECMS* improve service efficiency, while KLab/FabLab foster digital innovation and start-up ecosystems.
- **AI Focus**: Rwanda's AI Policy promotes skills, ethical adoption, and computing access, positioning the country as a responsible AI innovation hub.

Gaps

- **Cost & Access**: Fibre Internet remains costly for SMEs and households; **($24-$45 for 50 Mbps)**, rural areas and marginalised groups face barriers to full digital participation.
- **Cloud Capacity**: Limited local cloud infrastructure hampers AI adoption and scalability, forcing reliance on external providers for compute resources.
- **AI Ecosystem**: Few mature AI applications exist outside pilot projects; R&D capacity and private sector participation remain in early stages.

Physical Infrastructure

Strengths

- **Transport:** Kigali International Airport supports regional access with flights to 31 destinations, complemented by a 7,000 km road network.
- **Real Estate**: Modern office spaces and SEZs like Bugesera provide ready facilities for GBS/ITO firms to scale efficiently in Rwanda.
- **Urban Transit:** Public transport reforms have improved affordability and reliability, easing daily commutes for GBS employees in urban areas.
- **Safety and Security:** Ranked 3rd as among the least corrupt countries in Africa. World Bank found that 38% of international investors cited political stability and safety as key advantage

Gaps

- **Landlocked Location:** Rwanda's geographic isolation increases transport and input costs, affecting competitiveness versus coastal outsourcing destinations in Africa.
- **Rural Disparities:** Infrastructure development outside Kigali is limited, hindering decentralised operations and inclusion of rural youth in digital jobs.

BSEZ
Bugesera Special Economic Zone

Bugesera SEZ

Kigali Innovation City

irembo

Rwanda Integrated Electronic Case Management System
Rwanda IECMS

*Rwanda has made notable progress in e-governance, with platforms like **Irembo** providing 90+ government services online. Innovations such as **the Integrated Electronic Case Management System (IECMS)** (UNDP, 2024).*

*Kigali has seen a surge in GBS-relevant commercial property development. High-quality, move-in-ready office parks such as **Kigali Heights, Norrsken House**, and SEZ zones like **Kigali Innovation City** and **Bugesera SEZ** provide flexible, scalable, and secure facilities. Lease rates range from **$12–20/m²/month**, substantially lower than in Nairobi, Johannesburg, or Casablanca (Rwanda Investor Handbook, 2024).*

Kigali Heights

Norrsken House

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

Enabling Environment and Infrastructure | ICT, Connectivity, and Data Protection Frameworks

Rwanda is laying the groundwork for a thriving digital economy through bold reforms in ICT strategy, broadband infrastructure, and data governance - creating an enabling environment that supports innovation, secure connectivity, and inclusive digital transformation across sectors.

1. ICT Sector Strategic Framework (2024–2029)

Framework Components:

- **Vision:** "A thriving digitally advanced society where technology and innovation empower every citizen and business to participate in the digital economy."
- **Mission:** Deliver equitable access to affordable, reliable, and secure digital services.
- **Strategic Objective**: Accelerate digital economic growth through universal inclusion, service adoption, and productivity.

Three Strategic Priorities:

1. Foster Digital Transformation

- *Focus*: Digital skills development, innovation, and entrepreneurship.
- *Target:* 1.5 million citizens trained in digital skills; 50,000 digital jobs created.

2. Promote Digital Inclusion

- *Focus:* Infrastructure expansion, broadband affordability, cybersecurity.
- *Target:* Universal 4G coverage, increased smart device ownership.

3. Enhance Digital Service Delivery

- *Focus*: 100% digitisation of government services, Single Digital ID, smart cities.
- *Target:* 10 smart city solutions deployed; 10 public digital goods created

2. Connectivity and Broadband Infrastructure Framework

National Connectivity Infrastructure:

- **Fibre Optic Backbone**: 21,847 km of fibre cables under the National Backbone Infrastructure (NBI).
- **Undersea Cable Access**: Connected via Uganda, Kenya, and Tanzania to SEACOM, EASSy and other global networks with capacity of 5.6 Tbps.
- **4G LTE Coverage**: Over 96% of the population reached.
- **Internet Speeds**: Top 10 in Africa with average speeds of 30 Mbps download / 22.6 Mbps upload.

Key ISPs Supporting the Framework:

- Liquid Telecom, MTN Rwanda, Airtel, CanalBox, BSC; offering dedicated fibre, broadband, and enterprise packages.

Challenges & Opportunities:

- Broadband affordability and rural coverage are still limited.
- Emerging focus on national cloud infrastructure and high-speed regional integration

RISA
Rwanda Information Society Authority

Under the supervision of the Rwanda Information Society Authority (RISA), ICT governance and infrastructure have been modernized to support digital service delivery.

3. Data Protection & Governance Framework

Legal and Regulatory Anchors:

Data Protection and Privacy Law (2021–2022):

- Governs personal data processing.
- Promotes data localisation while enabling cross-border data flows.
- Aligns with global norms (e.g., GDPR-like principles) but is technology-agnostic (covers all processing, not just AI).

Data Strategy Goals:

- Develop unified protocols for data ownership, sharing, storage, and stewardship.
- Build a national database and dashboard linked to AI adoption monitoring.
- Promote open data policies (Rwanda is a signatory of the Open Data Charter).

Implementation Challenges:

- Limited data maturity across ministries.
- Absence of centralised custodians for datasets.
- Low institutional capacity in data handling and cybersecurity

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

Enabling Environment and Infrastructure | Role of Government, Regulators, and Industry Bodies

Rwanda's digital transformation is powered by strong institutional alignment, with government, regulators, and partners working in unison to foster investment, build talent pipelines, and drive inclusive, innovation-led growth across the GBS ecosystem.

Rwanda Global Business Services Growth Initiative

Role: National industry body

Mandate:

- Driving the growth of the country's GBS sector, focusing on investment promotion, policy advocacy, and talent development.
- Central to Rwanda's digital job creation agenda, helping transition from pilot projects to a robust, export-oriented GBS sector

Impact:

- Targeting 20,000 GBS jobs for youth by 2030.
- Strengthens Rwanda's positioning as a competitive GBS destination.

Mastercard Foundation

Role: Strategic philanthropy and partner

Mandate:

- Invests in skilling, youth employment, and digital transformation initiatives
- Partner in GBS and Digital Jobs project and other youth job creation platforms in Rwanda

GBS Involvement:

- Financial and programmatic support to GBS GI for training and job transitions
- Champions gender equity and digital inclusion in workforce design

Youth Employment and Skilling Partners

Organisations: Harambee Rwanda, ALX, SolvIT, Education First

Role: Talent pipeline developers

Mandate:

- Deliver youth skilling and job-readiness programmes aligned with GBS demands
- Focus on disadvantaged youth, women, and English language upskilling
- Serve as GBS GI implementation partners for transitions into jobs

Example: Harambee leads workforce analytics and inclusive hiring pilots

GIZ – Deutsche Gesellschaft für Internationale Zusammenarbeit and Invest for Jobs

Role: Development cooperation partner

Mandate:

- Drive inclusive labour markets by advancing skills development, youth employability, and sustainable job creation.
- Strengthen private sector capacity while promoting ethical digital innovation through "Invest for Jobs" and "FAIR Forward – AI for All".

Key Contributions:

- Funded Rwanda's AI Readiness and Maturity Framework with MINICT & C4IR.
- Co-developed the National AI Policy with focus on youth, ethics, and equitable cloud access.

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024), 3. Rwanda GBS GI

Enabling Environment and Infrastructure | Role of Government, Regulators, and Industry Bodies

Rwanda's digital transformation is powered by strong institutional alignment, with government, regulators, and partners working in unison to foster investment, build talent pipelines, and drive inclusive, innovation-led growth across the GBS ecosystem.

Ministry of ICT and Innovation (MINICT)

Republic of Rwanda
Ministry of ICT
and Innovation

Role: Policy-maker and sector strategist

Mandate:

- Drives Rwanda's digital transformation agenda and GBS enabling policies
- Oversees ICT Sector Strategic Plan (2024–2029) aligned to Vision 2050 and NST2
- Anchors infrastructure, digital literacy, and AI ecosystem development

Key Initiatives: Smart Rwanda Master Plan, National AI Policy, AI Readiness Framework

Rwanda Development Board (RDB)

Role: Lead investment promotion agency

Mandate:

- Oversees investor registration, business licensing, and aftercare services
- Facilitates tax and non-tax incentives under the Investment Code
- Leads national GBS investment marketing and sector coordination through the One Stop Centre

Impact: Attracted $3.2 billion in investment commitments in 2024; instrumental in GBS GI delivery

Rwanda Information Society Authority (RISA)

Role: Infrastructure and digital governance enabler

Mandate:

- Implements national digital infrastructure projects (fibre optic, 4G, cloud)Manages data centres, interoperability platforms, and digital public services
- **Focus:** Expand broadband access, promote digital trust, and ensure digital inclusion

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024), 3. Rwanda GBS GI

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Technological Trends and Innovation | Adoption of AI, ML, Cloud, and Digital Platforms

Rwanda is positioning itself as a forward-looking digital economy with an ambition to lead in emerging technologies such as Artificial Intelligence (AI), cloud computing, and e-governance.

1. AI and Machine Learning Adoption Framework

Framework Structure:

6 Core Pillars (AI Policy):

1. 21st Century Skills & AI Literacy
2. Reliable Infrastructure & Compute Capacity
3. Robust Data Strategy
4. Trustworthy AI Adoption in Public Sector
5. Widely Beneficial AI Adoption in Private Sector
6. Practical Ethical Guidelines

Key Initiatives and Metrics:

National dashboard tracks:

- AI-related GitHub commits, AI patents, AI-ready datasets.
- Number of AI professionals trained.
- Number of AI use cases adopted by government and private sector.

Flagship public sector AI examples include:

- RURA's use of ML for speed governor monitoring.
- BNR's use of AI for fraud detection.
- National Police's use of smart traffic lights

Private sector players include, SHAKA AI (BPO AI), Digital Umuganda (NLP), and Charis UAS (drone imaging)

2. Cloud Computing and Infrastructure Policy

Policy Actions:

Designation of RISA and NCSA to:

- Register local and foreign cloud providers.
- Audit and ensure compliance with national standards.
- Upgrade infrastructure as per cloud-first strategy.
- Publish ICT procurement guidelines for cloud adoption.

Strategic Targets:

Develop a continental AI-ready hyperscale data centre:

- Feasibility study, land allocation, skills audit, and roadmap in progress.
- Enhance internet throughput to support low-latency AI services.
- Indicator tracked: % cost reduction in cloud services; number of companies using authorised cloud services/

3. Digital Platforms Adoption and Expansion

Enabling Components:

- National Data Centre (Tier 3) with 99.98% uptime offers government cloud services and serves as Rwanda's digital backbone.
- 96% 4G LTE coverage and 7,000 km fibre-optic network underpin digital platform scalability
- Government platforms like IremboGov and Smart Kigali are models of digital delivery.

Data Governance Support:

- Multi-sectoral task force formed to create protocols for ethical and secure data sharing.
- Emphasis on AI-ready datasets and open data access for innovation.
- Tools like the National Dashboard will guide platform deployment and maturity tracking.

Rwanda's investments in cybersecurity—including the operationalisation of the **National Cyber Security Authority (NCSA)** and **Data Protection and Privacy Office**—underscore its intent to build trusted digital services that meet global standards.

While Rwanda ranks behind digital powerhouses like Kenya and South Africa in global AI indices (e.g., Oxford and Stanford), it is seen as a regional pioneer in **ethical AI governance** and **data localisation frameworks.** (AI Readiness Framework, 2024).

Source: 1. Rwanda GBS Case Study and Country Report, 2. Rwanda GBS Investor Playbook (2024),

Technological Trends and Innovation | Rwanda's Position in the Digital Innovation Ecosystem

Positioned as a Pan-African digital innovation leader, Rwanda's digital innovation ecosystem is underpinned by strategic government policies, investments in smart infrastructure, and international partnerships. These institutions promote the development of scalable tech infrastructure and frameworks that enable secure, digital service delivery to global clients.

- *The country's innovation ecosystem is built around:*
- *The **National AI Policy**, which aims to make Rwanda Africa's "Responsible AI Lab"'* [1]
- *Development of **Kigali Innovation City**, digital incubators, and 4IR centres of excellence.*
- *Hosting of international platforms such as the **Basketball Africa League Innovation Summit** and **Africa CEO Forum**, highlighting its profile as an innovation hub..*
- *Integration of startups, tech parks, academia, and government under one coordinated digital growth strategy.*

Kigali Innovation City (KIC) [3]

- **Type:** Mixed-use, smart innovation city within the Kigali Special Economic Zone.
- **Partners:** Africa50, Mastercard Foundation, CMU-Africa.
- **Facilities:** World-class academic institutions (CMU-Africa, ALU, AIMS), incubators, R&D labs, and corporate offices.

Impact Goals:

- 4,000 university graduates annually.
- 50,000 new jobs
- $150M in annual ICT exports

kLab and FabLab[2]

- **Type:** Incubator (kLab) and open hardware maker space (FabLab).
- **Purpose:** Provide mentorship, co-working space, and technical equipment for startups and students.
- **Backers:** MINICT and international donors
- **Role**: Early-stage tech ideation, especially in mobile apps, IoT, robotics, and 3D printing

Norrsken Kigali House

- **Type:** Entrepreneur and social innovation hub.
- **Capacity:** One of the largest startup campuses in Africa.
- **Focus:** Scales ventures in climate tech, fintech, healthtech, and impact entrepreneurship.
- Network: Linked to the Norrsken Foundation (Sweden), enabling access to international funding and acceleration.

Centre for the Fourth Industrial Revolution (C4IR) Rwanda

- **Host:** World Economic Forum, supported by MINICT and RDB.
- **Mandate:** Design and pilot AI, IoT, and blockchain policies for national and regional adoption.

Functions:

- Lead on AI ethics frameworks.
- Support AI and cloud policy development
- Host innovation challenges and regulatory sandboxes

Tech Use Cases

Zipline

- **Solution**: Drone-based medical delivery system.

Impact:

- 75% reduction in delivery time for medical supplies.
- Rwanda was the world's first country to integrate drones into national health logistics at scale.

Source: 1. Artificial Intelligence for Development, 2. FabLab Rwanda, 3. RDB: Kigali Innovation City, 4. Norrsken Kigali House, 5. C4IR Rwanda

Technological Trends and Innovation | Opportunities for Tech-Enabled Services Delivery

With continued investment in AI literacy, digital compliance, and secure infrastructure, Rwanda can differentiate itself as a reliable hub for digital outsourcing - not just in CX, but in next-generation tech support and product enablement.

Opportunity Area	Key Insights and Opportunities
1. Demand Catalysts (Domestic & Regional)	• Expansion of e-government services to 100% by 2029 creating demand for ICT and BPO solutions • Digitisation in education, health, agriculture driving sector-specific tech adoption • Regional spillover from mature hubs (Kenya, South Africa) and Francophone markets via Rwanda’s bilingual advantage
2. Workforce Readiness & Skilling	• Target to train 1.5 million citizens in digital skills and coding • Programmes for AI/data apprenticeships and university fellowships • Strong ecosystem of training partners (ALX, Harambee, SolvIT)
3. ICT & Cloud Infrastructure	• 96% 4G LTE coverage and strong fibre backbone • National ambitions to host regional cloud and AI compute infrastructure • Demand for cloud services, data centres and HPC solutions
4. Tech-Enabled Innovation Ecosystem	• Kigali Innovation City, kLab, FabLab, Norrsken fostering digital entrepreneurship • Showcases like Zipline (drone logistics) and Babylon (e-health AI) prove Rwanda’s innovation model • Growing fintech, edtech, and healthtech sectors
5. Policy & Incentives Alignment	• GBS GI targets 15,000+ new tech-enabled jobs by 2030 • Incentives include VAT exemptions, SEZs, and streamlined investor services via RDB • Strong IPA coordination with public-private skilling and job creation mandates

- Rwanda's **policy-led digital transformation**, combined with **cost-competitiveness, language diversity,** and **strong public-private partnerships**, makes it a compelling hub for **tech-enabled service delivery across Africa.**
- However, realising this potential hinges on resolving persistent challenges like digital skills gaps, data governance limitations, and global competition for digital services work.

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

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Macro-Economic and Business Risk Profile | Political and Economic Stability

Rwanda is widely recognized as one of Africa's most politically stable and transparent countries. It ranks among the least corrupt nations on the continent

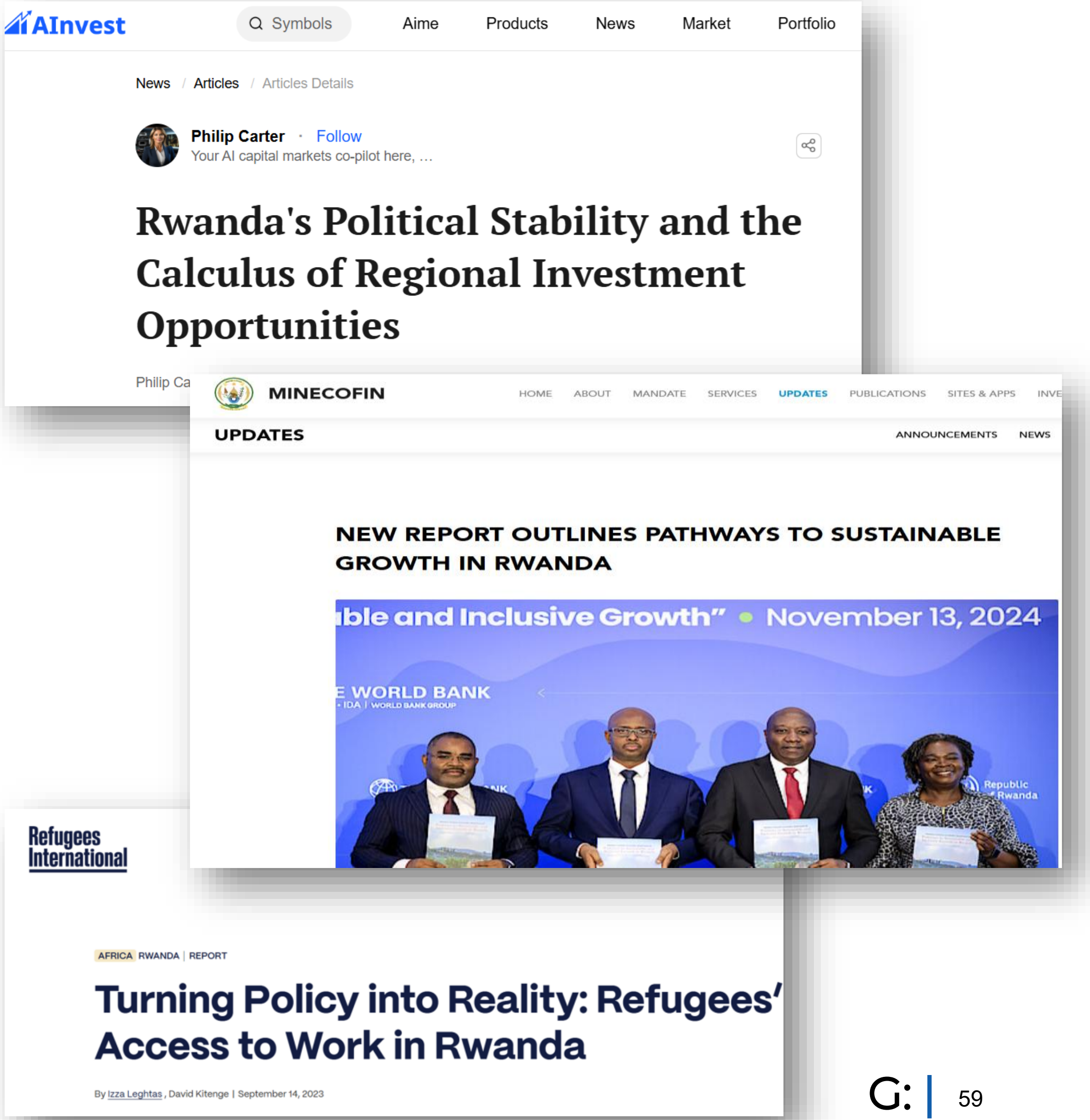
Political Stability [1]

Strengths

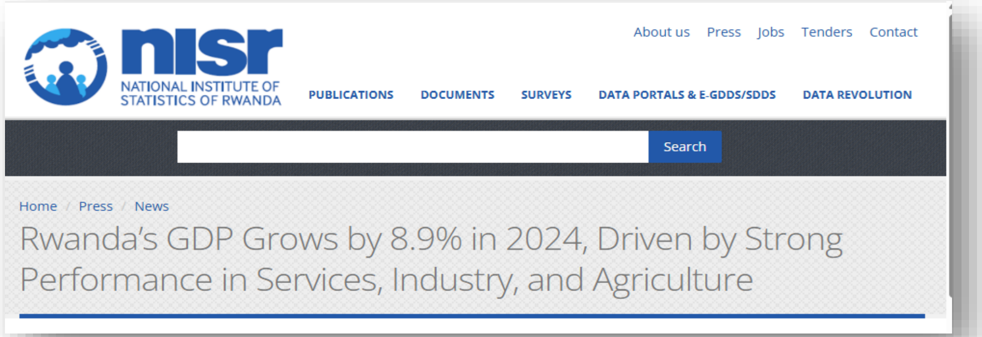
- **Post-conflict political cohesion:** Rwanda has been widely recognised for its extraordinary post-genocide recovery. A "development bargain" among elites has prioritised economic transformation over factional interests, fostering national unity and stability.
- **Governance effectiveness:** Rwanda exhibits strong public sector performance mechanisms such as *Imihigo* (performance contracts) and *Umushyikirano* (national dialogue), which reinforce government accountability and citizen engagement.
- **Trade Agreements**: Regional trade integration under the East African Community (EAC) and the African Continental Free Trade Area (AfCFTA)
- **International reputation**: Rwanda ranks highly in continental governance and safety indicators. It is considered the safest country in Africa and the sixth safest globally for solo travellers.
- **Institutional alignment:** Key entities such as the Rwanda Development Board (RDB) and Ministry of ICT & Innovation (MINICT) effectively coordinate investment and digital governance strategies.

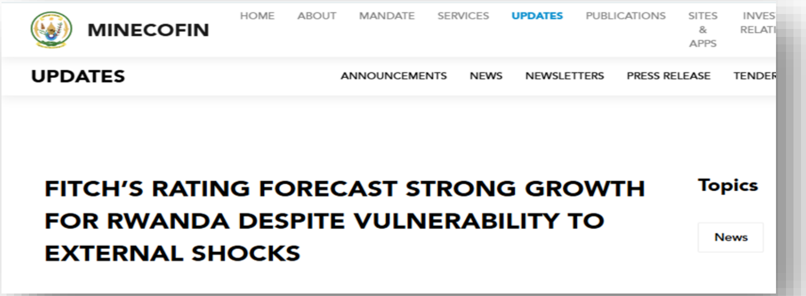
Risks

- **Regional volatility:** Although internally stable, its geographic location in the Great Lakes Region—bordering the DRC and Burundi—exposes it to some geopolitical spillover risks.



Notably, Rwanda also recognised for its sound economic polices and growth performance with GDP reaching 8.9% in 2024.





Economic Stability [1]

Strengths

- **Resilient growth performance**: Rwanda recorded 8.9% GDP growth in 2024, among the highest in Africa. This sustained performance underscores a robust macroeconomic framework and sound fiscal discipline.
- **Investment attractiveness:** Rwanda secured \$3.2 billion in new investment commitments in 2024, generating over 51,000 jobs. The country is actively expanding Special Economic Zones (SEZs) and digitalisation to attract FDI.
- **Pro-business environment**: Rwanda ranks 2nd in Africa on the World Bank's Doing Business index (2020) and features a centralised "One Stop Centre" for investors.
- **Controlled inflation and policy interest rates:** As of 2024, Rwanda maintained moderate inflation (13.7%) and a policy interest rate of 5%, reflecting a cautious but growth-oriented monetary stance.
- **Strong digital and innovation focus:** National strategies like the ICT Sector Strategic Plan (2024–2029) and AI Policy demonstrate commitment to future-oriented, productivity-enhancing reforms.

Risks

- **External dependence**: The economy remains vulnerable to exogenous shocks due to reliance on foreign aid and limited export diversification, although services and digital sectors are expanding.
- **Youth unemployment**: Despite overall growth, youth unemployment remains high (24.6% in Q2 2025), especially among university graduates, indicating a need for improved labour market absorption.
- **Landlocked geography:** Rwanda's landlocked status continues to impose high transport and logistics costs, although regional trade initiatives offer partial mitigation.

Source: 1. GBS.World | Genesis GBS Africa Benchmarking and Market Report, National Institutee of Statistics of Rwanda, Ministry of Finance and Economic Planning, Reuters Article

Macro-Economic and Business Risk Profile | Ease of Doing Business and Investment Climate

Rwanda offers one of Africa's most investor-friendly environments, combining streamlined regulations, digital-first governance, and strong political commitment - though challenges around scale, skills, and perception still shape the investment risk profile.

1. Regulatory Environment and Business Setup Efficiency	Rwanda's pro-business reputation is bolstered by a streamlined and digitised business registration process. Investors can establish a business in as little as **three business days**, facilitated by the **Rwanda Development Board's (RDB) One-Stop Centre**, which consolidates all necessary regulatory functions including investment registration, tax support, and permits issuance. This approach reduces bureaucratic friction and is in line with global best practices in public service digitisation.
2. Investment Policy and Tax Incentives	Rwanda's **Investment Code** offers a competitive package of **fiscal and non-fiscal incentives**, especially for export-oriented sectors like GBS/ITO. Benefits include **VAT exemptions on ICT equipment, customs duty waivers,** and **corporate tax reductions**, subject to eligibility criteria. The legal framework further provides robust **investor protections**, with clear land use laws, commercial dispute resolution mechanisms, and labour regulations ensuring compliance and security for foreign capital.
3. Political Will and Institutional Coordination	The country's transformation is underpinned by a unique **"development bargain"** among its high-level decision-makers, prioritising economic growth and long-term planning over short-term political gains. Key institutions like **RDB, MINICT**, and **RISA** are empowered to act as facilitators rather than gatekeepers, enabling a cooperative climate between public institutions and private investors.
4. Performance and Investor Track Record	Rwanda **attracted $3.2 billion in investment commitments in 2024**, a 32.4% increase over the previous year, with over **51,000 new jobs** created across strategic sectors. GBS-specific growth has been evident through the successful market entries of **TeKnowledge, CCI Global**, and **Deriv,** all citing ease of entry, available infrastructure, and coordinated support from government as enablers
5. Risks and Structural Gaps	Despite these strengths, Rwanda faces structural challenges: Landlocked geography imposes higher logistics costs for certain sectors; **small domestic market size** limits economies of scale; **limited high-skilled workforce** availability can constrain rapid ITO scale-up without aggressive talent development interventions; and **perception gaps** and limited global visibility of Rwanda's GBS sector remain a deterrent to large-scale international buyers
6. Digitisation and Governance	Rwanda's commitment to digital governance is exemplary, with high levels of **e-government maturity, fibre optic rollout,** and **mobile broadband penetration**. The ease of doing business is further facilitated by digital platforms like **Irembo**, which centralise access to over 96 government services, including permits and regulatory filings.

Source: 1. World Bank: B-READY (2024), 2. CNBC AFRICA Article

Macro-Economic and Business Risk Profile | Ease of Doing Business and Investment Climate

Rwanda offers one of Africa's most efficient business environments, with streamlined registration and licensing processes, reliable infrastructure and office space, accessible talent through coordinated hiring and skilling programmes, and growing support for client acquisition and international contracting.

1

Step 1: Business Registration and Licensing
~3 to 4 days
- Register company with Rwanda Development Board (RDB)
- Obtain Tax Identification Number (TIN) from RRA
- If in Special Economic Zone, apply for developer/operator license

2

Step 2: Regulatory Compliance Setup
~2 to 3 weeks
- Draft employment contracts under Rwanda Labour Law (2018)
- Ensure company structure complies with Companies Law
- Register for relevant taxes (VAT, PAYE, Corporate Tax)

3

Step 3: Office Space & Infrastructure Readiness
~1 to 2 months
- Secure move-in ready premises or SEZ facilities
- Set up ICT infrastructure (data centres, connectivity, systems)
- Ensure physical and digital security standards

4

Step 4: Operational Licensing & Governance
~1 to 2 months
- Implement internal HR and payroll management systems
- Apply for optional ISO or sector-specific certifications
- Develop company policies (anti-harassment, grievance, etc.)

5

Step 5: Intellectual Property & Data Compliance
~1 to 2 months
- Register IP assets under Rwanda's IP Law
- Establish data handling, client confidentiality, and storage protocols
- Align with international data protection standards if serving global clients

6

Step 6: Workforce Hiring & Skilling
~2 to 4 months
- Recruit local talent (prioritise youth & bilingual profiles
- Partner with skilling institutions (Harambee, Solvit, ALX, etc.)
- Implement training for CX, tech support, and digital readiness

7

Step 7: Client Acquisition & Contracting
~1 to 3 months
- Ensure contracts align with Rwanda's Commercial Arbitration Law
- Clarify SLAs, data governance, and IP usage in client agreements
- Register long-term agreements with relevant authorities if required

8

Step 8: Ongoing Compliance & Reporting
~1 to 3 months *
- Submit monthly/annual tax and employment filings
- Comply with reporting standards for SEZ or incentive schemes
- Participate in audits or inspections as required

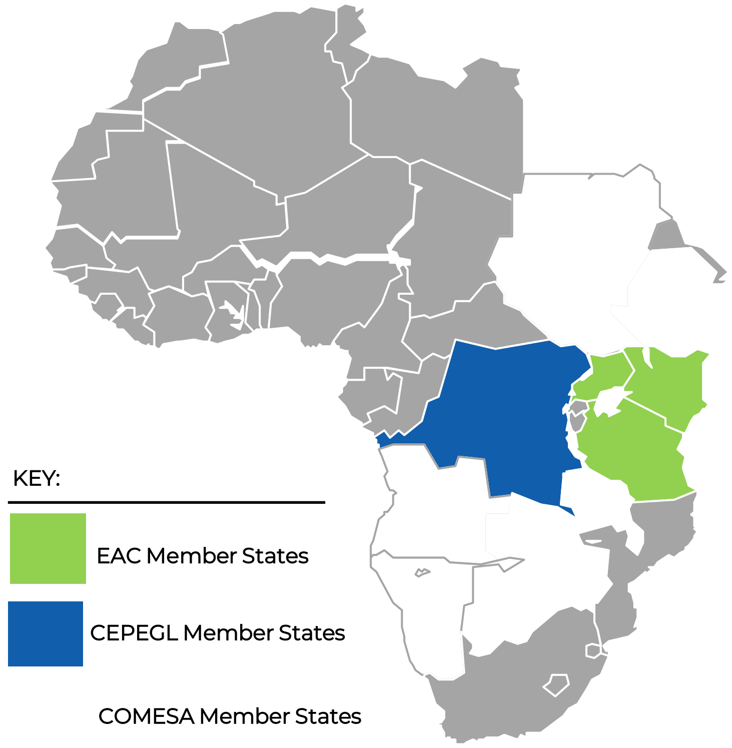
Source: Rwanda Business Procedures, Rwanda Revenue Authority, CFL Advocates

**A detailed step by step guide is included at the end as part of the appendices in slide 88.*

Macro-Economic and Business Risk Profile | Ease of Doing Business and Investment Climate

Regional integration unlocks access to over half a billion consumers through strategic trade blocs and bilateral agreements; positioning the country as a gateway to African and global markets for digitally driven investment and exports.

REGIONAL BLOCS
WHERE RWANDA IS A MEMBER



- Preferential trade regimes
- Member of the East Africa community common market.

Rwanda has a duty-free quota-free market access for goods entering the:

- European Union market
- American market through the American growth and opportunity act agreement.
- Signed bilateral investment traties with countries i.s. USA, South Korea and Congo Brazaville.
- Double taxation agreement with Mauritius, South Africa, Government of Jersey and the 4 partner states of East African community.
- Business opportunity – Large market size
- Rwanda: +11,000,000 people
- EAC (East African Community) : +152,000,000 people
- COMESA (Common Market for Eastern & Southern Africa) :+389,000,000 people
- CEPEGL (Economic Community of Great Lakes Countries) :+90,000,000 people

*Rwanda presents one of Africa's most **compelling environments for doing business**, particularly in knowledge and service-based sectors like GBS. Its political stability, digital governance, investor-friendly policies, and efficient institutional coordination are critical enablers.*

However, to sustain competitiveness, Rwanda must continue to bridge gaps in workforce skills, international visibility, and infrastructure logistics. Enhancing global marketing, talent scalability, and regional trade connectivity will be key to attracting and retaining larger-scale investors in the ITO and digital services segments

Source: 1. Rwanda Development Board

Macro-Economic and Business Risk Profile | Legal and Regulatory Landscape

Rwanda's evolving legal and regulatory landscape provides a robust, investor-friendly foundation; balancing modern corporate laws, consumer protections, and ethical business reforms to support sustainable digital and outsourcing sector growth.

1. Consumer Protection and Market Competition

Strengths:

- Rwanda's consumer rights are governed by the **Rwanda Inspectorate, Competition and Consumer Protection Authority (RICA)**, which enforces fair treatment and mitigates monopolistic practices.
- This establishes a **transparent, rules-based commercial environment**, which boosts investor confidence—particularly important for **outsourcing firms servicing retail, telecom, or digital consumers**.

Challenges:

- Enforcement capacity and consumer redress mechanisms may still be developing—requiring continued investment in institutional capability and digital complaint systems.

Insights:

- *These laws offer a **strong legal foundation for foreign and domestic investors**, minimising regulatory risk.*
- ***Rwanda's regulatory framework is relatively modernised** and pro-business, especially with simplified company registration and digitised tax compliance.*

2. Foundational Corporate and Labour Laws

Legal Area	Relevance for BPO/GBS Sector
The Companies Law	Provides clarity on director duties, shareholder rights, and corporate registration. Facilitates ease of business setup and governance.
Labour Law (2018)	Governs employment rights, dispute resolution, and worker protections. Offers a clear framework for BPO employers and outsourcing contracts.
Income Tax Act (2018)	Streamlines corporate tax procedures and reduces ambiguity in interpretation, fostering a predictable tax environment.

*Rwanda has introduced new legislation allowing businesses to register as **Benefit Corporations** (or **B Corps**), becoming only the sixth country globally to offer this legal option. This means companies in Rwanda can now formally commit to pursuing **both profit and positive social or environmental impact**, and be legally recognised for doing so.*

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024), BLab Africa Article

Macro-Economic and Business Risk Profile | Legal and Regulatory Landscape

Rwanda's modernised legal toolkit—spanning IP protection, arbitration, and SEZ regulations; strengthens its appeal as an innovation-friendly, investment-ready destination for high-trust outsourcing and tech-driven business operations.

3. Legislation for Innovation and Investment Corporate and Labour Laws

Law/Policy	Implication
Intellectual Property Law	Encourages innovation and protects outsourcing firms' proprietary tools, training content, or codebases—vital for ITO and KPO sectors.
Commercial Arbitration Law	Offers an alternative dispute resolution mechanism, critical for reducing the cost and time burden of commercial disputes.
Special Economic Zones (SEZs)	Defines licensing terms for developers and operators, providing a structured gateway for international firms to establish BPO operations with preferential terms.

Strategic Takeaway

- Rwanda's legal environment is **supportive of business operations**, with a comprehensive set of policies that address both commercial fundamentals (company, labour, tax law) and innovation-driven needs (IP, arbitration, SEZs).
- **Policy coherence and modernisation** have positioned Rwanda as one of Africa's more **transparent and investment-ready destinations.**
- Going forward, **continuous enforcement improvement, digitisation of legal services, and investor legal education** will enhance Rwanda's competitiveness for high-trust GBS and outsourcing clients.

Rwanda: New IP Legislation

Spoor & Fisher - 16 August 2024 Patents, Copyright, Rwanda, Geographical Indications, Industrial Designs, Enforcement, Trade Marks

Rwanda has recently published comprehensive new IP legislation. On 31 July 2024, *Law No. 055/2024 of 20 June 2024 on the Protection of Intellectual Property* ('the IP Law') came into effect. The IP Law significantly modernises and expands IP legislation in Rwanda. Below are some of the more important aspects of the IP Law.

Insights:
- *These laws offer a **strong legal foundation for foreign and domestic investors**, minimising regulatory risk.*
- ***Rwanda's regulatory framework is relatively modernised** and pro-business, especially with simplified company registration and digitised tax compliance.*

*Rwanda's new **Intellectual Property Law (Law No. 055/2024),** effective from 31 July 2024, modernises its **IP system** with a dedicated office, stronger trademark, patent, and copyright protections, and new safeguards for traditional knowledge. It streamlines applications, improves opposition processes, and aligns with global standards, fostering **innovation, investment**, and a **stronger creative** and **entrepreneurial ecosystem.***

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024) , Spoor Fisher Article: Rwanda IP Legislation

Macro-Economic and Business Risk Profile | Macroeconomic and Geopolitical Risks

While Rwanda's macroeconomic stability and governance reforms are strong, GBS investors must still navigate structural risks - from labour market fragility and scale limitations to FX exposure and mid-level talent gaps.

1. Labour Market Fragility

- The **unemployment rate remains high at 13.4%** in Q2 of 2025, with youth unemployment reaching 24.6%. Although this provides a deep talent pool, it signals **underutilisation of human capital** and **potential mismatch in workforce skills.**
- **Skills gaps**, particularly in advanced IT roles and English proficiency, may **constrain Rwanda's capacity** to serve higher-value GBS functions unless corrected through rapid upskilling.

2. Scale Constraints

- As a small, landlocked country, Rwanda faces **limited domestic demand** and higher transport/logistics costs relative to coastal peers.
- This limits scale for GBS operators that require high-volume operations or rely on quick access to hardware or international clients.

3. Over-reliance on Development Finance

- Development partner funding constitutes a significant portion of public investment. While this supports infrastructure and digital skilling, it creates fiscal dependency that could be challenged by global donor realignment.

4. Foreign Exchange and Import Exposure

- Rwanda's **trade balance remains structurally negative**, making it reliant on foreign exchange inflows from tourism, exports, and donor funding. Depreciation of the Rwandan franc could **increase imported input costs** for GBS firms, especially for IT infrastructure and cloud services.
- Though Rwanda is a model of internal stability, the broader **Great Lakes region remains geopolitically** sensitive. Tensions in eastern DRC and refugee flows could impact perception, though the government has consistently managed these risks without material disruption to business operations.

Credit Rating Risk [2]

Agency	Rating	Outlook	Date
Fitch	B+	stable	Apr 05 2024
Moody's	B2	negative	Mar 26 2025
Moody's	B2	stable	Sep 08 2023
S&P	B+	stable	Jan 27 2023
S&P	B+	negative	Aug 07 2020

- **Consistent Speculative-Grade**: Rwanda maintains a B+/B2 rating across Fitch, S&P, and Moody's, indicating moderate credit risk typical of frontier markets.
- **Improving Outlook**: Recent Fitch (2024) and S&P (2023) updates show a stable outlook, marking recovery from S&P's negative 2020 view—reflecting macroeconomic resilience and 8.9% GDP growth.
- **Key Risks**: Ratings remain constrained by external vulnerability, debt risks, and foreign exchange exposure.
- **Investor Signal**: Rwanda is seen as stable but not yet investment-grade, affecting capital access and borrowing costs.

Sector-Specific Risks in the GBS Context

Limited Mid-Level Talent:	Attrition vs. Engagement:	Cybersecurity and Data Privacy Risks:
Rwanda's talent base is abundant at entry-level but shallow at the mid-to-senior management tier, especially for ITO roles. This creates operational risk for providers needing client-facing delivery leads or systems administrators.	Although attrition in Rwanda is relatively low compared to global markets, the GBS workforce is young and may require continuous engagement and reskilling to retain talent over time.	As Rwanda expands its digital services, gaps in cybersecurity enforcement, data localisation, and compliance could pose risks for GBS providers handling sensitive data for international clients. However, regulatory frameworks such as the **Data Protection and Privacy Law** (2021) and institutions like the **National Cyber Security Authority** are actively addressing these gaps.

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024), 3. Trading Economics: Rwanda Credit Rating

Macro-Economic and Business Risk Profile | Cybersecurity and Compliance Considerations

Rwanda is steadily advancing its cybersecurity and compliance ecosystem, aligning with global standards and frameworks - yet enforcement, institutional capacity, and SME support remain critical priorities to ensure trusted, secure digital service delivery.

1. Strengthening National Cyber Resilience and Awareness

- Rwanda has made notable strides in elevating cybersecurity as a national priority.
- The establishment of national awareness programmes and growing investment in digital infrastructure underscore the government's commitment to enhancing cyber resilience.
- These initiatives align with Rwanda’s broader ambition to position itself as a secure and trusted destination for digital services—a prerequisite for attracting global GBS and ITO investment.
- However, the effectiveness of these efforts is currently tempered by limitations in institutional enforcement and technical capacity.

2. Emerging Adoption of International Standards

- Operators serving international clients in Rwanda are increasingly aligning with global data security and privacy standards such as ISO/IEC 27001 and GDPR.
- This is a positive development, particularly for firms like TeKnowledge and CCI Global, which are operating within a compliance-driven global client environment.
- These shifts signal growing maturity in Rwanda's private sector to meet buyer expectations, especially within tech-enabled services where data handling and cross-border processing are central.

3. Institutionalising Digital Compliance Frameworks

- While progress is evident, Rwanda's regulatory architecture still requires stronger institutionalisation of compliance mechanisms.
- The recently developed National AI Policy and the AI Readiness and Maturity Framework call for robust data governance protocols, ethical standards, and secure data infrastructure.
- Furthermore, the ICT Sector Strategic Plan (2024–2029) identifies cybersecurity as one of six strategic pillars, with objectives to enhance national cyber capacity, build trust in digital services, and expand cyber response capabilities.
- However, gaps persist in the operationalisation of these frameworks, especially for SMEs and startups who face cost and capacity constraints.

4. Gaps in Enforcement and Regulatory Capability

- Despite the ambitious policy landscape, Rwanda faces a deficit in enforcement and regulatory oversight.
- The Rwanda Utilities Regulatory Authority (RURA) and Rwanda Information Society Authority (RISA) have begun to build frameworks for data protection and cybersecurity governance, yet their current enforcement power is relatively weak compared to global regulatory benchmarks.
- This creates potential vulnerabilities, particularly as Rwanda seeks to scale its digital exports and attract more sensitive service lines such as healthcare and fintech outsourcing.

5. Outlook and Strategic Recommendations

- As Rwanda’s GBS sector evolves, building a secure, compliant, and buyer-trusted environment must be prioritised.
- Strengthening public-private collaboration on cybersecurity, scaling capacity building in secure coding and data privacy for youth, and institutionalising sector-specific compliance protocols are necessary next steps.
- Furthermore, operationalising the recommendations from the **National AI Policy**—particularly around ethical AI, cloud infrastructure security, and data stewardship—will be pivotal in ensuring that Rwanda is not only digitally enabled but also digitally trusted.

*The Government of Rwanda has advanced data privacy through the enactment of **Law No. 058/2021 of 13/10/2022**, its first dedicated data protection law. This **Data Protection and Privacy (DPP) Law**[1] establishes a comprehensive legal framework that defines clear rules for **the collection, processing, storage, and sharing of personal data**. It sets out organisational responsibilities and safeguards **individual rights to privacy,** marking a significant step in aligning Rwanda with global data protection standards.*

Source: 1. National Cyber Security Authority: DDP Law. , 2. Rwanda GBS Investor Playbook (2024)

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SWOT Analysis | Strengths, Weaknesses, Opportunities, and Threats

Rwanda's GBS sector presents a compelling mix of strengths; like cost advantages and bilingual youth; alongside real opportunities in AI and inclusive hiring, yet challenges in talent depth, scale, and market visibility require strategic mitigation.

Strengths (S)

1. Youthful, Bilingual Workforce

Over 70% of the population is under 30, with 4 million youth (18–35) and 62,000+ B2-level English speakers - many bilingual in French.

2. Cost Advantage

Among Africa's lowest operating costs ($502–$638/month per seat), with highly competitive entry-level wages.

3. Political Stability

Ranked 1st in Africa on the 2024 World Bank B-READY and Rule of Law indices - highlighting transparency and institutional efficiency.

4. Investor-Friendly Environment

RDB's One Stop Centre and incentives (VAT exemptions, tax holidays) support easy market entry.

5. Robust Digital Infrastructure

98% 4G LTE coverage and 21,847 km of fibre support digital services; full e-service digitisation targeted by 2029.

Weakness (W)

1. Limited Market Scale

Fewer than 7,000 GBS jobs as of 2024; low visibility among global sourcing networks.

2. Mid-Level Talent Shortage

Gaps in experienced IT professionals hinder complex service delivery.

3. Skill Gaps

Inconsistent English fluency and soft skills, particularly outside Kigali, affect employer onboarding efficiency.

4. Informality and Underemployment

High informal sector participation limits skilled talent access to formal GBS roles.

Opportunities (O)

1. Francophone Market Reach

Bilingual talent enables Rwanda to serve growing Francophone markets in West and Central Africa.

2. GCC and Time Zone Advantage

Aligned time zones position Rwanda to support clients across the GCC and Middle East efficiently.

3. Inclusive Hiring Leadership

Over 30% of GBS roles are filled through impact sourcing, aligning with ESG-focused outsourcing trends.

4. AI-Enabled Services

Growing AI infrastructure supports new services (e.g., data labelling, chatbot ops) across key sectors like fintech and health.

5. Alternative Delivery Hub

Rwanda is a cost-effective, low-attrition alternative for clients seeking diversification from traditional hubs.

Threats (T)

1. Regional Instability Perceptions

Proximity to conflict zones may concern risk-averse investors despite Rwanda's internal stability.

2. Global Economic Shocks

Tighter global budgets or FDI reductions may impact GBS job growth.

3. Mature Market Competition

Well-established peers (e.g., Kenya, Egypt, Philippines) have greater scale, services, and visibility.

4. Urban-Rural Digital Divide

Limited infrastructure outside Kigali restricts geographic expansion and rural inclusion.

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

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Strategic Recommendations | Priority Actions for Investment Promotion and Ecosystem Building

To unlock its full GBS potential, Rwanda must intensify global branding, enhance investor onboarding, and activate scalable infrastructure - while leveraging ethical sourcing and ecosystem coordination to attract values-driven digital investors.

1. Build Rwanda's Global Brand and Go-to-Market Strategy

Insight: Rwanda has yet to establish a globally recognised GBS brand like South Africa or the Philippines.

Recommendations:

- Launch targeted digital marketing campaigns, international roadshows, and participation in global sourcing events (e.g., IAOP, NASSCOM, GITEX).
- Position Rwanda as a boutique hub for ethical, impact-driven outsourcing, leveraging impact sourcing narratives and bilingual capabilities.
- Develop targeted value propositions for different market segments (e.g., French-speaking CX delivery, AI/tech-enabled services, women-focused hiring models).

Rationale: Rwanda's unique value proposition—political stability, bilingual talent, and affordability—is under-leveraged internationally

2. Create a Seamless Investor Onboarding and Aftercare Experience

Insight: While Rwanda has a One-Stop Centre for investors, first-hand testimonials from operators (e.g. TeKnowledge) reveal gaps in market entry navigation and expansion support.

Recommendations:

- Develop an "Investor Onboarding Toolkit" that includes regulatory guides, HR templates, cost calculators, FAQs, and onboarding timelines.
- Formalise a GBS Investor Concierge service within RDB to coordinate across permits, talent pipelines, office space, and utilities.
- Implement a "Fast-Track" expansion support protocol for existing investors scaling up operations (e.g., seat ramp-ups or tech upgrades).

Rationale: Fast and frictionless setup processes are critical in attracting and retaining anchor tenants in the early-stage ecosystem

3. Anchor Operators Through Infrastructure-Ready Sites

Insight: Kigali Innovation City (KIC) is underutilised as a GBS hub, and real estate readiness is a constraint to rapid scale.

Recommendations:

- Accelerate availability of GBS-suitable office parks within KIC and secondary zones with scalable internet, backup power, and flexible lease terms.
- Offer plug-and-play infrastructure packages (e.g., co-location with tech parks, shared IT infrastructure, coworking incubators).
- Incentivise real estate developers to create ready-built GBS sites through tax exemptions or public-private land access models.
- *Rationale: "Move-in ready" infrastructure played a key role in the rapid success of TeKnowledge Rwanda*

4. Strengthen Ecosystem Coordination and Visibility

Insight: Rwanda's GBS ecosystem is growing, but fragmentation among skilling, policy, and investor entities creates coordination gaps.

Recommendations:

- Institutionalise the Rwanda GBS GI (Growth Initiative) as a full-fledged implementation body with cross-agency authority and budget.
- Publish a GBS Ecosystem Dashboard with live data on talent availability, investment pipeline, training progress, and operator expansion.
- Host an annual Rwanda GBS Summit to bring together investors, talent providers, government, and buyers.

Rationale: Effective ecosystem orchestration has been pivotal in South Africa's BPESA-led growth and India's NASSCOM-driven brand development.

5. Promote Inclusive and Ethical Sourcing

Insight: Global buyers are increasingly prioritising ESG-linked sourcing (e.g., gender equity, youth employment, inclusive growth).

Recommendations:

- Develop a Rwanda-branded Impact Sourcing Certification in partnership with industry (akin to SA's impact sourcing designation).
- Provide incentives for inclusive hiring, such as wage subsidies for hiring youth, women, or persons with disabilities.
- Scale up success stories like TeKnowledge internal promotions and inclusive hiring pathways to showcase Rwanda's commitment.

Rationale: Buyers and investors are drawn to values-aligned sourcing destinations, especially where cost and ethics intersect.

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

Strategic Recommendations | Areas to Strengthen Rwanda's GBS Value Proposition

Rwanda is taking bold steps to strengthen its global competitiveness in the GBS sector through strategic reforms that build talent, incentivise innovation, and foster a digitally driven, inclusive, and trustworthy service delivery ecosystem.

1. Enhance English Communication and Workplace Readiness

Insight: While Rwanda has a growing B2-level English-speaking population (~62,000), elocution and workplace professionalism remain barriers for global-facing.

Recommendations:

- Expand elocution and CX communication training across public skilling institutions and onboarding programmes.
- Embed workplace readiness modules (professional etiquette, time management, client communication) into technical training.
- Incentivise operators to co-develop soft skills bootcamps via cost-sharing models or training tax credits.

Rationale: Rwanda must match talent quality to global service standards; effective communication is a top hiring requirement for CX and ITO roles

2. Develop a Pipeline of Middle and Supervisory Management

Insight: The current GBS workforce is largely entry-level, with limited pathways for team leads, supervisors, and account managers, constraining scalability and quality assurance.

Recommendations:

- Launch a Middle Management Accelerator Programme targeting fast-track promotions of top frontline agents.
- Partner with private providers to offer hybrid leadership certificates (e.g., project management, client servicing, operations).
- Offer performance-linked grants for companies investing in management-level upskilling.

Rationale: Building internal leadership capacity enhances retention, improves client satisfaction, and positions Rwanda for higher-complexity work

3. Subsidise Skills in High-Value, Future-Ready Domains

Insight: Rwanda must future-proof its workforce by developing capacity in growth areas like cybersecurity, cloud, AI operations, and digital service integration.

Recommendations:

- Provide tuition vouchers or wage subsidies for training in targeted fields (e.g., SOC support, cloud engineering, AI annotation).
- Co-fund certification programmes aligned with global standards (e.g., AWS, CompTIA, Google Cloud, ISC²).
- Scale existing public-private partnerships like SolvIT, Education First, and ALX to deliver niche tech modules.

Rationale: These domains offer high earnings potential and position Rwanda as a destination for value-added digital work, not just entry-level services

4. Introduce Incentives for Digital Service Delivery and Inclusive Training

Insight: Current incentive schemes are more favourable to export volumes than to digital service intensity or skills development outcomes.

Recommendations:

- Expand tax incentives to reward:
- Providers of high-complexity digital services (e.g., software testing, L1–L2 IT support).
- Companies that meet defined thresholds for youth, women, and refugee training.
- Establish a Digital Export Incentive Scheme with performance-based rebates tied to value-added services and job quality.

Rationale: A shift to performance-linked support will attract digital-native investors and accelerate the transition from CX to ITO and KPO domains

5. Strengthen Rwanda's Legal and Data Protection Framework

Insight: Despite having foundational ICT laws, Rwanda must elevate its data governance standards to meet global buyer expectations

Recommendations:

- Fast-track implementation of the Personal Data Protection and Privacy Law (Law No. 058/2021) with clear operational guidelines for GBS providers.
- Promote compliance readiness support for operators (e.g., GDPR equivalence training, certification support).
- Position Rwanda as a "Trust-First" outsourcing hub, with marketing aligned to secure data handling, ethical AI, and regulated innovation.

Rationale: A robust legal regime signals maturity to international clients, especially in high-compliance verticals like financial services, healthcare, and legal process outsourcing

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

Strategic Recommendations | Go-To-Market Messaging for Buyer Engagement

Rwanda is a smart, secure, and scalable delivery destination for next-generation global business services—where high performance meets high purpose.

Core Messaging Pillars

"Secure Growth. Scalable Talent. Smart Rwanda."

1. Smart: Digitally Ready & Future-Focused

- Ranked 10th globally for technical helpdesk support (GBS World, 2022)
- Home to TeKnowledge and CCI Global, showcasing enterprise-grade ITO/BPO delivery
- Strong digital infrastructure: 96% 4G coverage; 700km fibre network; 30 Mbps avg. speeds
- Emerging AI policy, cloud-readiness and high STEM graduate output (e.g., CMU-Africa, ALU).

2. Secure: Stable & Transparent Business Climate

- #1 in Africa on World Bank's 2024 B-READY index
- Top-tier rule of law (World Justice Project); safe, low-corruption environment
- Pro-business investment code; zero tax on exports; efficient One-Stop investor centre

3. Scalable: Impactful, Inclusive & Cost-Effective Talent Model

- Over 75,000 B2-level English speakers; bilingual French capability
- Youth-focused job pipeline: 200,000 GBS jobs targeted by 2030 (Harambee/Mastercard)
- Entry-level ITO salaries: $199–367; fully loaded costs ~$502–638 per seat/month
- Impact sourcing proven: TeKnowledge internal promotion rate >60% to Level 2 engineers

Strategic Proof Points

- *TeKnowledge Rwanda grew workforce by 251% within one year; outperformed KPIs*
- *CCI Global Rwanda supports thousands of global CX roles with strong local retention*
- *Inclusive skilling efforts support youth, women, and refugees, funded by GIZ & MCF*
- *Ready infrastructure: Kigali Innovation City, tech parks, and SEZs support plug-and-play setup.*

ESG & Impact Sourcing Proposition

- *Rwanda positions itself as an ethical outsourcing hub aligned to buyer ESG goals*
- *Growing female participation, inclusive hiring targets, and sustainable job creation*
- *Aligns with international CSR and SDG frameworks—ideal for purpose-led sourcing*

Source: 1. Rwanda GBS Case study and Country Report, 2. Rwanda GBS Investor Playbook (2024)

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TeKnowledge – Driving Continuous Progress

TeKnowledge

tek experts

Now Part of TeKnowledge

Overview: *TeKnowledge, a global provider of technical talent solutions, selected Rwanda as a strategic location for delivering IT and cloud support services. Rwanda's political stability, growing talent pool, reliable infrastructure, pro-business environment, and government support created a compelling foundation for TeKnowledge to establish operations in Kigali in September 2021, even during the COVID-19 pandemic*

Projects Undertaken

Setup and Launch:
- TeKnowledge collaborated with Harambee Youth Employment Accelerator for early talent sourcing and launched operations with 50 engineers supporting a major international software client.

Service Expansion:
- Initially offering Level 1 technical support, TeKnowledge expanded rapidly to include Level 2 support, customer success, and sales support.

Talent Development:
- Through internal leadership programmes like "Level Up", technical training (e.g., through elev8, a sister company), and partnerships with GIZ, they upskilled local employees, promoting internal growth.

Business Continuity:
- Built a strong business continuity plan (BCP) using Rwanda's 7,000 km fibre backbone, 24/7 safe transport systems, and remote work readiness, ensuring uninterrupted service delivery throughout the pandemic.

Impact

Exceptional Performance:
- Surpassed targets across key metrics: customer effort, customer satisfaction, and productivity scores.

Rapid Growth:
- Expanded from 50 to 199 engineers in just over a year, projecting growth to 600 by the end of 2023.

Employee Development:
- 60% of initial engineers promoted to Level 2, with many stepping into leadership and specialised roles.

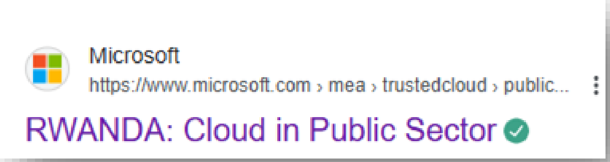
Multilingual Capabilities:
- Delivering services in English, French, and German.

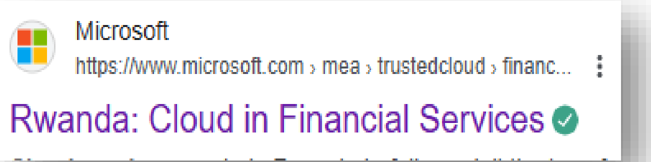
Resilient BCP:
operations with zero COVID-19 workplace transmission for over a year, pivoting effectively to hybrid and remote models when needed.

Conclusion: *TeKnowledge's success in Rwanda demonstrates the power of strategic market entry backed by strong ICT infrastructure, skilled talent, and government support. Despite global disruptions, the company scaled rapidly and now plans to expand into high-value IT areas like cybersecurity and analytics, leveraging Rwanda's innovation ecosystem for continued growth.*

Source: TeKnowledge: Rwanda Case study, Tech City: Tek Experts and Microsoft partnership

Microsoft – Empowering Rwanda's Digital Transformation






ePaper Business Daily

HOME EAST AFRICA WORLD

Kigali partners with Microsoft to digitise education

WEDNESDAY, APRIL 19, 2017 — UPDATED ON DECEMBER 27, 2020 - 2 min read

Overview: Microsoft has been a key player in Rwanda's digital transformation journey, contributing to the country's vision of becoming a knowledge-based economy. Through innovative technologies and strategic initiatives, Microsoft supports Rwanda's efforts to modernize its economy, improve public services, and empower its citizens with digital skills.

Projects Undertaken

Microsoft Leap Program:

- In partnership with TeKnowledge, Microsoft launched the Leap program in Rwanda to address the gender gap in the tech industry and empower women in technology.
- This 16-week immersive program combines classroom learning with hands-on projects, equipping participants with technical skills and real-world experience.
- The collaboration with TeKnowledge ensures that participants receive high-quality training and mentorship, preparing them for successful careers in the technology sector and fostering diversity in the workforce.

Cloud Technology Adoption:

- Microsoft introduced trusted cloud services like Azure and Office 365 to Rwanda.
- These services empower businesses, government institutions, and non-profits to enhance efficiency, reduce costs, and improve data security.

Support for SMEs:

- Microsoft provides tools and solutions tailored to small and medium-sized enterprises (SMEs) in Rwanda.
- These initiatives help SMEs streamline operations, improve customer engagement, and scale their businesses.

Impact

Talent Development:

- Programs like Microsoft Leap, in collaboration with TeKnowledge, have contributed to the development of a skilled and diverse ICT workforce in Rwanda.

Economic Growth:

- By enabling businesses to adopt advanced technologies, Microsoft supports economic development and competitiveness in Rwanda.

Enhanced Public Services:

- Microsoft's solutions improve e-governance and service delivery, ensuring better access to essential services for citizens.

Global Competitiveness:

- Microsoft's initiatives position Rwanda as a regional leader in technology and innovation.

Conclusion: Microsoft's commitment to innovation and digital transformation makes it a key partner in Rwanda's technological advancement. By empowering individuals, businesses, and government institutions, Microsoft plays a pivotal role in fostering innovation, enhancing skills development, and supporting Rwanda's journey toward becoming a knowledge-based economy..

Source: Microsoft Leap Program, Tech City: Tek Experts and Microsoft partnership, Microsoft: Cloud in Rwanda

CCI GLOBAL

Organization Bio

CCI one of the largest providers of customer management services in Africa, supporting domestic and international customers. Headquartered in the UAE the group comprises of several companies across the African continent. CCI services brands in the USA, UK, Australia, New Zealand, South Africa, Kenya and others.

CCI's operations began in 2006 with 5 employees and today their workforce has exponentially grown and made them one of the largest BPO companies in Africa with our operating centres in South Africa, Kenya, Egypt, Ethiopia, Ghana and Rwanda.

One of the fastest growing markets and at the spearhead of CCI's continuous evolution strategy is Rwanda where they employ over 700 people.

Number of Operations in the Country:	1
Major Points of Presence	Kigali
Operating Years in Rwanda	2 Years
Total Seats/Agents/Knowledge Workers*	1,045
Global Markets Serviced	USA, UK, Australia and Africa

*Workforce numbers reflect Q2 (April- June) 2025 period.

Vertical Industries Serviced

- Airlines
- Born Digital
- Healthcare
- Financial Services
- Retail & eCommerce
- Telecommunications
- Travel & Hospitality
- Technology

Services Offered

- Back office processing
- Billing queries
- Customer acquisition
- Cross/upsell, retention & win-back
- Customer Insight & analytics
- Lead generation & management
- Inbound customer service
- Outbound customer service
- Retention, cross-up-selling
- Technical support
- IT help desk

Automation And Technology

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

Source: Genesis Global Business Services iSON xperiences

Organization Bio

As a global leader in Customer Experience Management and Business Process Outsourcing, iSON Xperiences is leading the way in combining human efforts with technology to deliver customer delight.

Be it onshore, offshore, nearshore, or remote working, we provide modern omnichannel technologies, people, processes, and infrastructures that build value across every customer interaction, on all channels.

With over 18,000 employees across 18 countries in Africa, Middle East and ASEAN, serving 50 million global customers across Telecom, BFSI, Energy & Utilities, Government, Media & Entertainment, Aviation, Retail, E-commerce.

Number of Operations in the Country:	1
Major Points of Presence	Kigali
Operating Years in Rwanda	14
Total Seats/Agents/Knowledge Workers*	250
Global Markets Serviced	Africa, North America, Middle East, Europe, APAC, Africa

Workforce numbers reflect Q2 (April- June) 2025 period.

Vertical Industries Serviced

- Telecom
- BFSI
- E-commerce
- Automotive
- e-government
- Energy and Utilities
- Media and Entertainment
- Aviation
- Retail
- Financial Services

Services Offered

- Customer Experience Management
- Outbound Sales
- HR Outsourced Services
- Debt collection services
- Workforce Mmanagement
- Digital CX Transformation
- Customer Journey Mapping
- AI
- Business Analytics and Insight
- Robotic Process Analytics
- Data Security

Key Clients Names

- Multichoice
- Vodacom
- MTN
- TymeBank
- ubank
- ABSA
- Cook Door
- Toyota

Automation And Technology

- Artificial Intelligence
- Machine Learning
- Robotic Process Automation
- Chatbots
- CRM Tools

Source: Genesis Global Business Services

TeKnowledge

Organization Bio

TeKnowledge has provided specialised business and IT support services to some of the world's leading technology brands. Our global delivery model spans customer support, software engineering, cloud services, and cybersecurity, offering end-to-end tech expertise tailored to client needs.

Rwanda is a growing hub for digital services and a strategic base for TeKnowledge' operations in East and Central Africa. The country's stable business environment, strong digital ambitions, and investments in ICT infrastructure and talent development make it an ideal location for scalable service delivery.

TeKnowledge Rwanda leverages a skilled, multilingual workforce to provide world-class technical support and customer success services. Our Kigali centre offers English and French language capabilities and is aligned with Rwanda's vision for inclusive digital transformation, youth employment, and global service excellence.

Number of Operations in the Country:	1
Major Points of Presence	Kigali
Operating Years in Rwanda	4
Total Seats/Agents/Knowledge Workers*	777
Global Markets Serviced	Europe, North America, Latin America, Africa, Asia -Pacific

**Workforce numbers reflect Q2 (April- June) 2025 period.*

Vertical Industries Serviced

- Technology and IT Support
- Telecommunications
- Financial Services
- Retail
- Healthcare
- Manufacturing
- Automotive

Services Offered

- Technical Support
- Customer Success
- Tech Talent Sourcing
- Digital Skilling
- Managed Services
- Cybersecurity Readiness

Key Clients Names

- Microsoft
- Accenture
- Ernst & Young
- HSBC
- PwC
- CA Technologies

Automation And Technology

- AI-driven Enterprise Tech Support
- Tech Talent Sourcing
- Customer Success Platforms

Source: Genesis Global Business Services

Case Studies and Use Cases | Case Examples of Impact Sourcing and Digital Jobs

These use cases provide proof points that Rwanda can build a world-class GBS sector. They also demonstrate that Rwanda is uniquely placed to lead in the emerging domain of "impact sourcing with digital excellence."

CCI Rwanda (BPO/CX services)

Who they hire:
- Economically disadvantaged, first-time job seekers aged 18–35.

How they source:
- Through structured partnerships with NGOs, churches, and local institutions. Open-house events demystify BPO work for youth and their families.
- *"We prioritise youth that have never had formal employment… many come in with no BPO experience at all."*
- *"We host open house events where their parents can see the workplace - it builds trust."*

Why they do it:
- CCI explicitly integrates impact sourcing as a core of their model, blending business scale with social transformation.
- *"It's more than just a job - we're creating career paths for people who were previously excluded."*
- *"Purpose-driven engagement through impact sourcing" was cited as a key retention driver, contributing to their low attrition rate of just 6–10%.*

AmaliTech Rwanda (ITO/Digital services)

Who they hire:
- Graduates, refugees, and women from underserved backgrounds.

How they source:
- Via six-month **pre-employment training**, AI-assisted inclusion tools, and active recruitment from refugee-linked institutions like Kepler.
- *"We've piloted sign language support tools and are experimenting with AI tools for persons with disabilities."*
- *"Refugees can't access many job markets, so we've partnered to give them direct entry through our training."*

Why they do it:
- As a registered **social enterprise**, Amalitech's impact model is deeply embedded in its structure.
- *"Even after hiring, they're not immediately ready - we commit to 6 more months of coaching… It's expensive, but that's our mission."*
- *"We're not just doing business - we're solving a social problem."*
- This intense investment (~$5,000 per candidate) reflects a long-term commitment to skilling underserved talent for high-value digital jobs.

iSON Xperiences (CX & AI services)

Who they hire:
- Orphaned youth, underprivileged groups, and PWDs (where roles allow).

How they source:
- Formal MOUs with NGOs like **SOS Village Rwanda** to ensure sustained pipelines.
- *"We don't run ad-hoc hiring drives. We build pipelines from orphanages and training centres so these youth know jobs are coming."*
- *"Some of our best agents today were kids from SOS Village… they just needed a first break."*

Why they do it:
- iSON views **inclusive hiring as both CSR and business sustainability**—diversity contributes to culture and brand loyalty.
- *"We see it as creating shared value - our clients appreciate the inclusion, and it keeps our team grounded and loyal."*
- They also support **soft skills training**, financial literacy, and life coaching to ensure retention and life-readiness.

TeKnowledge (AI-focused ITO firm)

Who they hire:
- Women, refugees, and people with disabilities (PWDs).

How they source:
- Inclusive talent practices embedded in recruitment and leadership, supported by targeted development programs.
- *"We've hit 70% female leadership - it's intentional. It's not about quotas, it's about designing for equity."*
- *"We support refugee hiring where feasible—we believe in rebuilding lives through technology."*

Why they do it:
- As a **DEI-driven, AI-first company**, TeKnowledge links inclusion with performance and innovation.
- *"AI gives us leverage, but it's the human diversity that drives creative solutions…that's our edge.You don't need a privileged background to master cybersecurity or Copilot. You need access - and that's what we provide."*
- Their model reallocates talent from lower-level tasks to **higher-skilled AI-assisted roles,** empowering nontraditional hires.

Source: Genesis Global Business Services, CCI Global, TeKnowledge, Africa Outlook: Ison Xperiences, AmaliTech

Case Studies and Use Cases | Case Examples of Impact Sourcing and Digital Jobs

These use cases provide proof points that Rwanda can build a world-class GBS sector. They also demonstrate that Rwanda is uniquely placed to lead in the emerging domain of "impact sourcing with digital excellence."

Ojemba (Web and mobile development)

Who they hire:

- Young Rwandans (especially women), Pan-African talent, and diverse candidates with growth potential.

How they source:

- Through **community outreach, parent engagement**, and early career mentorship.
- *"We work with families to help them understand the value of tech jobs… many still don't see it as stable work."*
- *"We hired 28 people in our first year, many of whom were women straight from local bootcamps."*

Why they do it:

- Ojemba is motivated by a **nation-building** ethos and gender empowerment.
- *"We want to rebuild Rwanda with our own hands, through tech."*
- *"Empowering women is not just ethical - it's strategic. They bring stability and leadership potential."*
- Their small but focused team culture includes international exposure (e.g., Germany visits), hackathons, and well-being support.

The GYM (Developer training & placement)

Who they hire:

- Low-income youth, especially women.
- How they source:
- Operates **free-of-charge programs** linked to public universities, with modular curriculum tailored to employer needs.
- *"We don't charge - our job is to take people who already know how to code and make them industry-ready."*
- *"Women in Tech is more than a campaign - it's how we get 50–60% of our cohorts female."*

Why they do it:

- The Gym views access to global ITO jobs as a route to social mobility
- *"We're not just filling jobs - we're shaping Rwanda's future tech ecosystem."*
- *"These students don't just learn—they build confidence, networks, and a sense of belonging."*
- They partner with the Ministry of ICT & Innovation and plan national expansion through universities.

Deriv (Financial services support)

Who they support:

- While not a frontline impact hirer, they support marginalised youth through CSR and trauma-informed HR.
- *"We haven't had disabled candidates yet… but we support a school for vulnerable children."*
- *"We also offer trauma counselling - recognising where our staff and country come from matters."*

Why they do it:

- Deriv acknowledges that stable jobs for youth are critical to long-term peace and prosperity.
- *"There's a lot of talent here. If there's no jobs, they get frustrated. And a frustrated youth population is dangerous for any country."*
- *"It's a win-win: we grow, they get dignity and income. That's why we're here."*
- Deriv sees Rwanda's GBS growth as not just commercial, but **nation-stabilising.**

Rohde & Schwarz Rwanda – Cybersecurity and Software Development Services)

Who they hire:

- Skilled youth talent, largely from top local and international universities.
- Inclusive of diverse candidates; no formal impact sourcing, but strong non-discrimination ethos. Open to hiring people with disabilities, where roles are suitable.

How they source:

- Skill-based hiring: Focus on ability, not background, they foster a culture of innovation through diversity, and encourage employee-led ideas, some of which are implemented.
- *"Hiring is based on skills and willingness to work… diversity is not just a value, it's a key driver of innovation."*

Why they do it:

- Rohde & Schwarz is deeply invested in developing Rwanda's tech ecosystem by empoweing youth through dignified, well-paying jobs, believing that investing in talent drives both social impact and business value..
- *"Rwanda offers the talent and integrity needed to build something world-class and inclusive."*

Source: Genesis Global Business Services, All Africa, Rohde & Schwarz, Deriv, The GYM

Case Studies and Use Cases | Attrition Rate and Workforce Dynamics by Rwanda Service Providers

Rwanda's GBS workforce is young, driven, and remarkably stable ; with attrition rates well below global BPO standard. This strong employee commitment is fuelled by purpose-driven employment, global exposure, and Rwanda's disciplined work culture, though regional disparities and tracking gaps remain.

AMALITECH	• Workforce is committed but requires a long post-hire ramp-up (up to 6 months). Heavy investment (estimated $5,000 per person) is needed for readiness. Refugee and gender inclusion (30% women in workforce)
CCI GLOBAL	• 6–10% annual attrition; low for BPO. Majority of workforce are first-time workers aged 18–35. • Team Leader assigned 15-18 Agents and Operation Manager assigned 8-10 Team Leaders. Estimated workforce is 55% women.
DERIV	• Attrition rate was below 2% over four years; now around 3.5%. Staff described as loyal and motivated by clear career progression and benefits. • However, pension contributions rose 6%, cutting take-home pay and raising employer costs.
iSON experiences	• Attrition around 5–7%, slightly higher post-holiday (Dec-Feb). Staff described as promising and resilient.
Ojemba	• No formal attrition data, but emphasis on team cohesion and long-term engagement reflects low turnover.
ROHDE&SCHWARZ	• No rates shared, but team is described as empowered and encouraged to innovate, fostering strong retention.
TeKnowledge	• Not quantified; AI-driven operations have reduced low-skill roles, reallocating staff to high-value tasks. • Women comprise 49% of total employees and 70% of leadership.
The GYM	• Virtually no attrition in ITO roles. GBS journey is still in early stages; lacks anchor clients and momentum in sales. • Further international exposure and demand generation is required to scale effectively.

Strengths Observed:

- Most operators report **low attrition rates**, particularly compared to global BPO norms (often 20–35%). This is attributed to Rwanda's youthful, motivated labour force, cultural discipline, and a strong sense of purpose among workers; especially in impact-sourced roles.
- Employers consistently note **high employee loyalty**, especially when roles include international exposure or meaningful career paths (e.g., Deriv, The Gym, iSON, Amalitech).

Critical Gaps & Opportunities:

- **Data opacity:** Few operators systematically track or disclose attrition data in Rwanda. Without consistent benchmarks, it's difficult to assess performance or make evidence-based improvements.
- **Urban concentration risk**: Motivation remains high in Kigali, but talent in secondary cities is largely untapped. This limits national scale and increases dependence on Kigali's urban labour pool; raising future attrition risk as labour supply saturates.
- **Job quality differentials:** While IT/ITO roles show strong motivation and retention (e.g., Ojemba, The Gym), BPO voice-based jobs may face future disengagement unless upskilling and enrichment opportunities are built in.

Source: Rwanda GBS-BPO Operator Interviews

Case Studies and Use Cases | Retention Drivers and Training Initiatives by Rwanda Service Providers

Retention in Rwanda's GBS sector is anchored by strong training-to-employment models and career growth pathways .Operators that invest in skills development, mentorship, and inclusion see higher loyalty; yet standardization and gender equity remain critical next frontiers.

AMALITECH	• Extensive training for managers and technical staff, internal career advancement, sustainable scaling strategy with minimal disruption.
CCI GLOBAL	• Purpose-driven impact sourcing, visible career pathways and performance via real-time dashboard, regular staff recognition, and feedback loops. • 3–6 weeks of soft skills, systems, and language training, with ongoing support from coaches and team leads.
DERIV	• Competitive and fair pay, vertical and horizontal career mobility, performance incentives, salary reviews. • International certifications (e.g., Great Place to Work), annual travel perks.
iSON Xperiences	• Medical insurance, internal career progression, financial literacy training, culturally relevant appreciation (e.g., end-year gifts), recognition programmes.
Ojemba	• Loyalty bonuses, team events, hackathon culture, personal development programs. Upskilling through bootcamps, mentorships and international exposure (e.g. Germany trips). • Community activities and parental engagements to build trust.
ROHDE & SCHWARZ	• Strong innovation culture, integrity-driven environment, supportive of diversity.
TeKnowledge	• Strong focus on AI-enabled upskilling and internal development of employees.
The GYM	• Internal coaching, AI-focused training and tech upskilling, 'Train the Trainer' model, project-based learning. • Staff retained via international exposure and strong personal development pathways.

Source: Rwanda GBS-BPO Operator Interviews

Strengths Observed:

- Training is deeply embedded in most firms' mode; Amalitech, The Gym, and CCI stand out for structured onboarding and clear advancement tracks.
- Retention is reinforced by a blend of **career mobility** (CCI, Deriv), **international exposure** (Ojemba, The Gym), and holistic support (e.g., iSON's mentorship, CCI's leadership development).
- Operators with **pre-employment training models** (e.g. Amalitech, The Gym) demonstrate better integration, faster performance ramp-up, and lower attrition.

Critical Gaps & Opportunities:

- **Lack of standardization:** Training quality and content vary significantly by provider. Some firms offer full-stack development training, while others rely on ad hoc coaching. This creates inconsistent employee readiness across the sector.
- **Gender and inclusion gaps:** While most operators target women and youth, female participation in ITO roles remains low (especially in software and AI). Disability inclusion is still nascent, with only TeKnowledge and Amalitech making early efforts.
- **Weak post-training metrics:** Few firms track training ROI (e.g. skill application, promotion rates), limiting their ability to optimize programs or scale successful practices.

Case Studies and Use Cases | Innovation, AI and Technology Uses by Rwanda Service Providers

Rwanda's GBS sector is embracing AI and digital tools, positioning itself for high-value global delivery. Early movers are integrating AI into service lines and workforce skilling, but broader adoption requires targeted support for smaller players and frontline teams.

AMALITECH	• Piloting AI tools for inclusion (e.g., sign language support); cautious about AI's disruptive potential in BPO and education sectors.
CCI GLOBAL	• AI not yet deployed in Rwanda; pilots underway in Kenya and Nigeria on AI and conversational bots. Exploring AI-driven training and service delivery.
DERIV	• Limited mention of AI, but strong reliance on stable ICT infrastructure. Internet costs are notably high; about 3.5 times more expensive than in their other global offices.
iSON xperiences	• Advanced AI uses empathetic, multilingual AI for CX, with bots that adapt to tone and trigger follow-ups. AI supports real-time tracking, automated reports, and omnichannel engagement. • Service is shifting to tech-assisted, self-serve models to reduce cost to serve.
Ojemba	• Internal AI use to enhance productivity, automation and website builds; partnerships with global tool like AWS/Microsoft certification; innovation culture supported by mentorship and tech talks.
ROHDE&SCHWARZ	• AI and automation are embraced as productivity enhancers. Innovation is integrated into daily operations, with staff contributing ideas.
TeKnowledge	• AI-first company using Microsoft CoPilot. AI has cut resolution times from 2.5 hours to 45 minutes, boosting productivity.
The GYM	• AI embedded in training and development workflows. Curriculum is modular and tailored to employer tech demands.

Strengths Observed:

- Rwanda's GBS sector is experiencing **fast-paced innovation,** particularly in AI and automation, with pioneers like Deriv, TeKnowledge, and iSON already integrating tools into operations.
- Rwanda is home to **AI-first delivery models** (e.g. TeKnowledge, Deriv's AI engineering), and proactive experimentation (e.g. CCI's AI innovation workshops).
- Several operators are building **internal AI capabilities**, not just adopting off-the-shelf tools; indicating long-term tech enablement.

Critical Gaps & Opportunities:

- **Innovation is not yet inclusive**: Smaller and early-stage BPOs (especially voice-based ones) lack resources or capacity to adopt AI, creating a divide between digitally advanced and lagging providers.
- **AI literacy gap**: Many employees, especially in entry-level roles, lack awareness or training on how AI is used in their workflow. This limits productivity gains and may create fear of displacement.
- **Limited government facilitation**: While Rwanda's national AI policy exists, there is little operational support for GBS-specific AI integration (e.g., subsidized tooling, AI adoption grants, regulatory sandboxes).

Source: Rwanda GBS-BPO Operator Interviews

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Global and Regional GBS Landscape | Global Competitor Comparisons: Rwanda vs. Top Peers

When benchmarked against global peers, Rwanda emerges as a cost-competitive hub with a fast-improving ecosystem, strong ESG credentials, and a boutique niche positioning that sets it apart in the global GBS race.

Competitor Markets	Costs Competitiveness	Talent Pipeline & Language Capabilities	ESG Factors	GBS Incentives	Infrastructure & Business Environment	Sector Maturity	Total score (Out of 30)
Rwanda	Among the lowest GBS operating costs worldwide; salaries and OPEX undercut even India/Philippines. 4	Est. 75k B2 English speakers; ~2k new hires per month sustainable; bilingual (English/French) talent is unique. 3	Strong impact sourcing (est. 33% disadvantaged workers), near gender parity, green energy, low corruption. 5	Investment Code with tax holidays, VAT/customs exemptions, one-stop facilitation. 4	96% 4G coverage, 99.7% power uptime, efficient governance, fast company registration. 4	Small base (est. 3,057 international jobs), high growth potential, boutique niche positioning. 3	23
Ethiopia	Extremely low costs for labour and power, though efficiency is still building. 5	Huge youth demographic with emerging English/French skills; sector still nascent. 3	Government-driven youth/women employment, renewable hydro power base. 3	5–10 year tax holidays, duty exemptions, ICT Park with one-stop shop. 4	Telecom liberalization, abundant hydro power, improving ease-of-business but still evolvi 2	Est. 30k jobs, nascent ecosystem, huge potential but early-stage. 2	19
Ghana	Strong cost advantage, with labour and office costs lower than Kenya. 4	Educated, English-speaking youth; BPO workforce est. 23k with large underutilized graduate pool. 4	Stable democracy, youth-focused job creation, improving gender representation. 3	10-year tax holidays, tax credits for graduate hires, free zone benefits. 4	Strong submarine cable links, stable power post-2015, improving bureaucracy, stable democracy. 3	Emerging with est. 20–25k jobs, new roadmap (BOSAG), steady scaling. 3	21
India	Historically low-cost, though wages in tier-1 cities are rising 5	Largest global GBS talent pool; millions of grads annually, broad skill spectrum. 4	Strong corporate CSR programs, diversity efforts, new data protection act, growing sustainability initiatives. 4	SEZ incentives (5–10 year tax holidays), state-level subsidies, established frameworks. 4	Robust IT parks, reliable utilities in major hubs, bureaucratic but improving business reforms. 4	Global leader with millions employed, $190B+ industry, mature across all services. 5	26
Kenya	Competitive but mid-tier; cheaper than South Africa, but higher than Rwanda/Ghana/Ethiopia. 4	Deep pool; est. 642k B2 English, ~130k annual grads, strong CX and IT base. 4	Inclusive (57% female), impact sourcing enterprises, 85%+ renewable power mix. 4	Only recently introduced ITO/BPO policy; some SEZ benefits, reforms in motion. 3	Six undersea cables, 100k km fiber backbone, vibrant tech scene, moderate bureaucracy. 3	Est. 36k jobs, $709M revenue, 19% CAGR, diverse services (CX + IT). 4	22
Philippines	Still cost-competitive, but labour costs have risen; tier-2 cities keep costs manageable. 4	1.8M employed; 850k grads/year, globally renowned for CX talent. 5	People-centered BPO industry, ~55% female, strong data protection laws, CSR embedded in firms. 4	PEZA regime with 4–7 year tax holidays, permanent 5% gross income tax rate, duty-free imports. 5	PEZA IT parks ensure reliable power/internet, disaster recovery measures strong, some congestion issues in Manila. 4	1.8M jobs, $37B industry, global #1 in voice BPO, highly mature. 5	27
South Africa	Higher wages and real estate costs, but incentives offset some of the gap. 4	Mature, experienced workforce; est. 377k employed, with strong managerial depth. 5	Global leader in impact sourcing (formal designation), strong diversity hiring, established governance 5	World-class cash-per-job grants, tax breaks, SEZ benefits, training subsidies. 5	World-class urban infrastructure, strong legal system, but power blackouts remain a risk. 4	Largest in Africa, est. 377k jobs, $3.7B revenue, highly diversified and global reputation. 4	27

Poor Performance	1	2	3	4	5	Strong Performance

Source: 1. GBS.World | Genesis GBS Africa Benchmarking and Market Report

Global and Regional GBS Landscape | GBS Benchmarking Comparison: Rwanda vs. Top Peers

Rwanda is carving out a unique niche in the global GBS landscape—offering competitive costs, a growing bilingual talent pool, and strong impact sourcing potential, while standing shoulder-to-shoulder with Africa's leaders and global giants

	Rwanda	Ethiopia	Ghana	India	Kenya	Philippines	South Africa
1. GDP (US$ Billion)	US$ 13.7	US$111.0	US$ 77.0	US$ 3530.0	US$ 110.0	US$ 437.1	US$ 380.0
2. Est. Youth Population (Million)	4.1 Million	35.3 Million	9.5 Million	424.9 Million	16.8 Million	34.9 Million	21.6 Million
3. GBS Workforce Size (Domestic & Int.)	8,326	32,825	19,672	6.6 Million	36,394	1.7 Million	377,375
4. Est. Total Addressable Talent Pool	535,705	816,393	642,641	244.8 Million	2.2 Million	5.9 Million	2.6 Million
5. Est. B2 English-speaking Addressable Talent Pool	75,121	131,980	476,905	83 Million	642,641	2 Million	733,717
6. Fully Loaded (FTE) Monthly Costs (US$/seat)	$625 - $834	$278 - $390	$610 - $813	$689 - $939	$868 - $1,157	$875 - $1,194	$1,140 - $1,505
7. Average Contact Centre Salary (Agent Int.)	$245 - $510	$95 - $195	$239 - $436	$220 - $417	$336 - $620	$340 - $735	$489 - $900
8. Average Digital ITO Salary (IT Helpdesk)	$356 - $743	$98 - $203	$326 - $681	$225 - $427	$316 - $658	$383 - $798	$501 – $1,008
9.Minimum Wage (US$/month)	$18.4 - $150	$3- $30	$28 - $45	$65 - $244	$106 - $125	$173 - $309	$260-$312

Source: 1. GBS.World | Genesis GBS Africa Benchmarking and Market Report

Step 8: Ongoing Compliance & Reporting (Approx. 1 to 3 months)

Best Practices During Months 1–3

- **Assign a local compliance officer or legal advisor** to monitor all statutory obligations.
- **Audit internal processes** against Rwanda's laws (labour, IP, tax, etc.) using checklists and third-party reviews.
- **Engage with business associations (e.g., PSF, ICT Chamber)** to stay updated on regulatory changes and filing deadlines.
- **Digitise all compliance submissions** using Rwanda's e-government platforms (e.g., e-Tax, IremboGov, RSSB online).

1. Tax Compliance (Monthly & Quarterly)

- **Pay As You Earn (PAYE) submissions**: Monthly employee tax withholding declarations and payments to the Rwanda Revenue Authority (RRA).
- **Value Added Tax (VAT) filings:** If registered, VAT declarations and remittances are required monthly.
- Corporate Income Tax (CIT): Advance tax payments may begin quarterly depending on turnover thresholds.
- **E-Tax platform setup:** Ensure you're registered and active on RRA's e-tax portal for digital submissions.

2. Labour & HR Compliance

- **Workforce registration:** All employees must be reported to the Rwanda Social Security Board (RSSB) and receive national pension coverage.
- **Employment contract filing:** Contracts must be signed and, in some cases, registered (especially for foreign workers or specific industries).
- **Social Security & Pension Contributions:** Monthly deductions (usually around 8% employee + 3% employer) submitted to RSSB.
- **Workplace policies submitted (if required):** Internal HR policies (grievance, health & safety, working hours) may be reviewed in audits or on request.

3. Reporting to Investment or Licensing Authorities

- **Rwanda Development Board (RDB):** May require quarterly or semi-annual updates for firms operating under investment licenses or SEZ regulations.
- **Special Economic Zone (SEZ) reporting:** Firms operating in SEZs must track and report incentive usage, employee numbers, local procurement, and compliance with SEZ standards

4. Data & IP Compliance (Initial Period)

- **Initial data handling policy implementation:** Develop and begin enforcing data protection and privacy policies, especially if serving international clients.
- **IP registration (if applicable):** Within the first few months, register trademarks, proprietary tools, or platforms with Rwanda's Office of the Registrar General under the IP law.

5. Commercial and Arbitration Readiness

- **Contract templates finalised**: Standard service-level agreements (SLAs), employment agreements, and vendor contracts should be aligned with Commercial Arbitration Law.
- **Dispute resolution mechanism established:** Internal escalation protocols for handling client or employee disputes, including referrals to arbitration centres if needed.

Source: 1. ?????

Strategic Recommendations| Way forward Phased Roadmap & KPI's (6-24 months)

Rwanda's GBS roadmap fast-tracks global visibility, scales digital talent and infrastructure, and positions the country as a trusted, boutique outsourcing hub. This phased approach ensures Rwanda moves from foundation building, scaling to global competitiveness, while KPIs track tangible progress across investment, talent, and branding.

Phase 1: 0–12 Months (Immediate Priorities)

1. **Build Rwanda's Global Brand & Go-to-Market Strategy**

- Launch targeted digital campaigns, attend IAOP/NASSCOM/GITEX.
- Position Rwanda as a boutique, ethical hub.
- Develop value propositions for French CX, AI/tech-enabled, women-focused hiring.

KPI: Rwanda represented at ≥3 global sourcing events; 3–5 targeted digital campaigns; Rwanda listed in top-20 sourcing directories.

2. Seamless Investor Onboarding & Aftercare

- Develop "Investor Toolkit" (HR templates, regulatory guides, FAQs).
- Launch RDB GBS Investor Concierge & fast-track expansion protocol.

KPI: Investor toolkit published; onboarding time reduced by 30%; ≥3 investors report improved aftercare satisfaction.

3. English & Workplace Readiness

- Expand elocution and CX communication training.
- Embed workplace readiness in curricula.

KPI: 2,000 youth trained in workplace readiness; employer satisfaction >70%.

4. Strengthen Data & Legal Framework

- Fast-track enforcement of Data Protection Law.
- Provide GDPR/GDPR-equivalent training and certification.

KPI: 5 operators certified in data protection; ≥2 international clients onboard citing compliance confidence

Phase 2: 12–24 Months (Scaling Interventions)

5. Anchor Operators via Infrastructure-Ready Sites

- Scale plug-and-play sites in Kigali Innovation City & SEZs.
- Incentivize developers with tax exemptions/public-private land access.

KPI: 50,000m² GBS-ready office space delivered; 3 new operators move into plug-and-play sites.

6. Develop Middle-Management Pipeline

- Launch Middle Management Accelerator Programme.
- Partner with private training for hybrid leadership certificates.

KPI: 200 supervisors/team leads promoted; 5 companies co-invest in leadership upskilling.

7. Subsidise Future-Ready Skills (AI, Cloud, Cybersecurity)

- Introduce tuition vouchers and wage subsidies.
- Expand partnerships with SolvIT, EF, ALX, CMU Africa.

KPI: 1,000 certifications issued (AWS, CompTIA, Google Cloud); ≥30% women participation.

8. ESG & Inclusive Hiring Incentives

- Launch Rwanda Impact Sourcing Certification.
- Provide wage subsidies for hiring youth, women, PWD.

KPI: ≥40% female workforce share maintained; 500 PWD/refugees placed; 3 certified operators adopt ESG label

Phase 3: 24–36 Months (Consolidation & Growth)

9. Institutionalise Rwanda GBS Growth Initiative (GBS GI)

- Grant budget and cross-agency authority.
- Launch a live ecosystem dashboard on talent, **investments, and jobs.**

KPI: Annual Rwanda GBS Summit launched; dashboard updated quarterly; ≥500 jobs facilitated annually via coordination.

10. Incentives for Digital Service Intensity

- Shift incentives from volume (CX) to value (ITO/KPO)
- .Create Digital Export Incentive Scheme.

KPI: ≥20% of GBS revenue from ITO/KPO services; 5 firms claim digital export incentives.

11. Position Rwanda as a "Trust-First" Outsourcing Hub

- Align marketing to secure data handling, ethical AI, and regulated innovation.

KPI: Rwanda recognised in 2 global trust/security rankings; attract ≥2 compliance-heavy sector investors (health, BFSI).

Strategic Recommendations| Rwanda GBS Readiness Scorecard

This Rwanda GBS Readiness Scorecard is a dynamic benchmarking tool that tracks the country's progress across cost, talent, ESG, incentives, infrastructure, and sector maturity; showcasing Rwanda's unique edge as a high-value, impact-driven outsourcing hub while highlighting priority areas for growth year on year.

Dimension	Score (2025)	Benchmark Notes	Key Metrics to Track Annual
Cost Competitiveness	5	Rwanda has one of the lowest global OPEX; beats India/Philippines in contact-centre costs	• Average monthly agent salary (USD) • Average fully-loaded seat cost vs competitors
Talent Pipeline & Language Capabilities	3	Estimated 75k B2 English pool, approx. 2,087 hires/month ramp; bilingual EN/FR talent	• Annual graduates by discipline (STEM, business, CX) • Percentage of unemployed grads at B2 English • Female and refugee participation
ESG Factors	5	Estimated 33% impact-sourced workforce, near gender parity, strong governance, renewable power base	• Percentage of female in GBS • Percentage of youth/refugees employed • ESG certifications (ISO 26000, B Corp, Impact Sourcing Standard)
GBS Incentives	4	Tax holidays (5–7 years), VAT/customs exemptions, RDB one-stop shop	• Uptake of investment code benefits • SEZ/Innovation City occupancy • Time to process investor permits
Infrastructure & Business Environment	4	96% 4G coverage, 99.7% power uptime, top in Africa for governance (B-READY rank)	• Average internet speed (Mbps) • Power outage hours/year • Global Ease of Doing Business or B-READY ranking
Sector Maturity	2	Small base (approx. 3,700 international jobs), but CAGR 8.9–30% with intervention; boutique positioning	• Total GBS jobs (international + domestic) • Export revenue from GBS • Number of international providers present

Overall, 2025 Readiness Score
23 / 30 = 77% readiness
(Strong cost, ESG, and incentives performance; needs talent scaling and sector depth to mature further)

Scoring Framework
1 = Very Weak / Nascent
2 = Weak / Emerging
3 = Moderate / Developing
4 = Strong / Maturing
5 = Very Strong / Mature / Global Leader

Each year, Rwanda (through RDB, BNR, Ministry of ICT, or the Rwanda GBS Council) can fill in the scores with latest data and notes.

How Rwanda Can Use & Update the Scorecard

1. Annual Data Collection:
- Collect from NISR (National Institute of Statistics of Rwanda), RDB, Harambee, universities, BNR (National Bank of Rwanda), industry associations.
- Update workforce, costs, infrastructure, and incentive implementation progress.

2. Benchmark Against Competitors:
- Compare scores annually against Ghana, Kenya, South Africa, Ethiopia, India, and the Philippines.
- Highlight where Rwanda has improved (e.g. Talent Pipeline from 3 to 4) to investors.

3. Action Plan Linkage:
- Tie weaker areas (Talent, Sector Maturity) to policy interventions e.g., launch of new training programs, expansion of Kigali Innovation City tenants.
- Showcase improvements (e.g. % female hires, ESG certifications) as part of Rwanda's impact-driven branding.

4. Visual Dashboard:
- Present as a heatmap or spider chart to government stakeholders, investors, and industry forums.
- Easy to update annually as a "GBS Competitiveness Index" for Rwanda.

Acknowledgement

This report was compiled with the support and input of:

Rwanda Global Business Services Growth Initiative is Rwanda's flagship programme to position the country as a competitive global outsourcing hub. Anchored in the government's ambition to create 20,000 new GBS jobs by 2030, the initiative provides strategic direction, targeted policy support, and ecosystem coordination to scale digital and technology-enabled services. It works closely with government, private sector, and international partners to build Rwanda's talent pipeline, strengthen infrastructure readiness, and attract global investment in BPO, ITO, and KPO services

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), is the German government's international development agency. With operations across Africa, GIZ provides expertise in sustainable economic growth, private sector development, and skills enhancement. Through its Special Initiative "Decent Work for a Just Transition" (Invest for Jobs), GIZ works to create better conditions for private investment and quality job creation across Africa, including support for Rwanda's Global Business Services (GBS) sector to unlock inclusive employment opportunities, enhance skills, and drive business competitiveness.

Harambee Youth Employment Accelerator is a social enterprise working with Rwanda's government and private sector to improve youth employment outcomes. Harambee provides labour market insights, employer-driven training, and job-matching solutions that link young people to meaningful work opportunities. Its interventions support the growth of Rwanda's GBS sector by strengthening talent readiness, promoting inclusive hiring, and creating pathways for marginalized youth to access quality employment.

Mastercard Foundation supports Rwanda's ambition to create dignified and fulfilling work for its young population through the Young Africa Works strategy. The Foundation partners with government and private sector stakeholders to strengthen skills development, digital readiness, and youth employment pathways. Its programmes expand opportunities in high-growth sectors; including GBS and digital services; by enhancing workforce capabilities and enabling sustainable economic inclusion for young people, especially young women.

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This report was compiled with the support and input of:

Rwanda Development Board (RDB) is the government's primary institution for investment promotion, business facilitation, and private sector development. RDB drives Rwanda's transformation into a knowledge-based economy by creating a competitive and investor-friendly environment. Through strategic reforms, investment incentives, and targeted sector support, RDB plays a pivotal role in accelerating the growth of Rwanda's GBS sector, facilitating international partnerships, and creating sustainable employment opportunities for Rwandans, especially youth and women.

Invest for Jobs, an initiative of the German Federal Ministry for Economic Cooperation and Development (BMZ) implemented by GIZ, aims to improve conditions for sustainable private investment and job creation in Africa. In Rwanda, the programme actively supports the growth of the GBS sector by enabling business development, strengthening workforce skills, and promoting inclusive employment models. Its interventions are designed to generate quality jobs for young people, women, persons with disabilities, and other marginalised groups, while supporting companies to establish and scale operations successfully in Rwanda.

Genesis Global Business Services is a global-to-local research, advisory and strategy firm for today's Experience Economy. We work with our clients and partners to determine what specific questions and challenges they need to diagnose and then design GBS demand-to-supply side analyses and benchmark reports to answer these questions backed by go-to-market action planning and implementation services. This includes syndicated research reports, qualitative-to-quantitative indexes, value propositions, and strategies enabling digital and ITO, business process outsourcing & management (BPO/M), and impact sourcing programmes to provide employment for youth, women and people with disabilities.

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RWANDA GLOBAL BUSINESS SERVICES GROWTH INITIATIVE

RDB RWANDA DEVELOPMENT BOARD

harambee YOUTH EMPLOYMENT ACCELERATOR

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