



RWANDA GBS/BPO & DIGITAL VALUE PROPOSITION

EXTENDED VERSION





This Value Proposition is designed to provide a structured, data-driven analysis of Rwanda's positioning as a sophisticated, emerging destination for Global Business Services (GBS) and Business Process Outsourcing (BPO). It serves as a key resource for investors, service providers, and industry stakeholders seeking insights into Rwanda's competitive advantages and market potential.

Understanding the Structure

- The Value Proposition is built upon the **Rwanda GBS/BPO Value Proposition Framework on Slide 3**, which serves as the foundation for the entire deck.
- It is structured into **five distinct sections**, each corresponding to the key pillars outlined in the framework:
 1. High-Growth, Sophisticated Hub for Global Service Delivery
 2. Young, Committed and Business-Ready Talent Pool
 3. Smart Infrastructure and Global Connectivity
 4. Digitally-Enabled and Future-Ready for Next-Gen Services
 5. Robust Industry Support from Diverse Stakeholders

Each section includes **infographic-style slides** that **quantify and validate** the key points outlined in the framework, making it easier to interpret and apply.

How to Interpret the Deck

- **Comparative Data & Benchmarks:** The deck provides comparative insights into Rwanda's standing relative to global and regional outsourcing destinations.
- **Market Validation:** Each section presents statistics, data points, and success indicators that reinforce Rwanda's competitive positioning.
- **Investor Relevance:** The insights are tailored to highlight Rwanda's cost efficiencies, scalability, workforce strengths, and infrastructure readiness.
- **Policy & Industry Implications:** The data can support decision-making for both government policymakers and industry stakeholders interested in fostering growth in Rwanda's GBS/BPO sector.

Key Applications

- **For Investors & Service Providers:** Use this deck to access data on Rwanda's operational and cost advantages, workforce capabilities, scalability and infrastructure readiness.
- **For Policymakers & Industry Stakeholders:** Apply these insights to refine sector development strategies, workforce training programs, and investment promotion initiatives.
- **For Enterprises Considering Market Entry:** Utilize the Value Proposition as a guide for understanding business setup costs, regulatory incentives, and workforce availability in Rwanda.

About the Research and Data Collection

The insights and data presented in this Value Proposition were compiled through a rigorous multi-source research approach:

- **Demand-Side Surveys:** Conducted with **global GBS/BPO enterprise investors and buyers** in key source markets (Australia, Europe, the UK and US) to assess key decision-making factors, investment priorities and service/location preferences.
- **Supply-Side Analysis:** Gathered from **Rwandan-based GBS/BPO operators and industry stakeholders** to capture local market realities, skills development, workforce capabilities, and operational insights.
- **Rwanda Country Profile Data:** Incorporated insights from the Africa GBS Benchmarking & Market Data Bank, which tracks market trends and sector performance across 32 African outsourcing destinations.
- **Secondary Research:** Supplemented by reports, studies, and industry literature from reputable sources, analysts and research organizations.

By leveraging these insights, stakeholders can make data-driven decisions regarding investment, talent, cost competitiveness, scalability, and market expansion in Rwanda's growing GBS/BPO sector.

Rwanda's GBS/BPO Value Proposition Framework



Rwanda is an emerging sophisticated destination for global business services, combining competitive costs, high-calibre bilingual talent, and digital-first infrastructure. An expanding track record in CX, IT support, and back-office services positions it as a trusted and scalable partner for enterprises seeking purpose-driven, future-ready delivery.



High-Growth, Sophisticated Hub for Global Services

- **Proven global expertise** in CX and back-office service delivery.
- **Fast-growing capabilities** in IT support, cloud services, software development, and AI integration.
- **Growing sector** of 35+ local and international operators driving delivery excellence in IT/CX for Europe and the US.
- **Industry-led GBS Growth Initiative** aims to create a 20,000 strong workforce by 2030.
- **Exceptionally competitive costs** across wages, OPEX, and infrastructure.
- **Ideal launchpad** for pilot projects, strategic scale-ups, and long-term delivery. Rwanda's political stability and consistent governance create a secure foundation for sustainable growth



Young, Committed and Business-Ready Talent Pool

- **Scalable talent pool** with over 2,000 B2-level English hires available each month.
- **Balanced, youth-powered workforce** - 89% under 35, with 48% women and growing participation of refugees and persons with disabilities.
- **Multilingual advantage** with strong English-French bilingualism across the sector.
- **Highly regarded work ethic**, marked by reliability, discipline, and loyalty.
- **Strong academic pipeline**, including four STEM-focused universities producing future-fit graduates.



Smart Infrastructure and Global Connectivity

- **Nationwide digital backbone** with 96% 4G LTE coverage and connectivity to the global grid.
- **Plug-and-play office space**, with move-in-ready facilities and SEZ advantages.
- **Kigali's Smart City infrastructure** underpins reliable utilities, safety, and digital-first service delivery. Renowned for its cleanliness and safety, Kigali offers a uniquely secure environment for global business services.
- **Globally accessible** through 31 direct flight routes, including key hubs in Europe, the Middle East, and Africa.
- **Worker-friendly transit systems**, with affordable and reliable commuting options for GBS talent.



Digitally-Enabled and Future-Ready for Next-Gen Services

- **Government-backed commitment** to future-focused skills through the 1 Million Coders vision and national ICT investment.
- **Ranked among Africa's AI-ready front-runners**, reflecting strong digital strategy execution and ecosystem maturity
- **Globally recognised institutions** driving talent in cloud, cybersecurity, and data.
- **Advanced national e-government systems** reinforcing Rwanda's digital-first service environment.



Robust Industry Support from Diverse Stakeholders

- **Strong public-private collaboration** through the GBS Growth Initiative launched in 2023.
- **Coordinated ecosystem development** led by government, chamber and skills development partners.
- **Workforce readiness enabled** by coordinated stakeholder support for demand-led skilling initiatives.
- **Streamlined investment support**, ranked 2nd in Africa for ease of doing business.
- **Continental leader for transparency and good governance** (ranked 1st for regulatory framework and 4th for corruption in Africa). Rwanda's safety and political stability reinforce trust and long-term investor confidence

Clickable Section Covers



Investor & Operator Focus



Investor & Operator Focus



Investor Focus



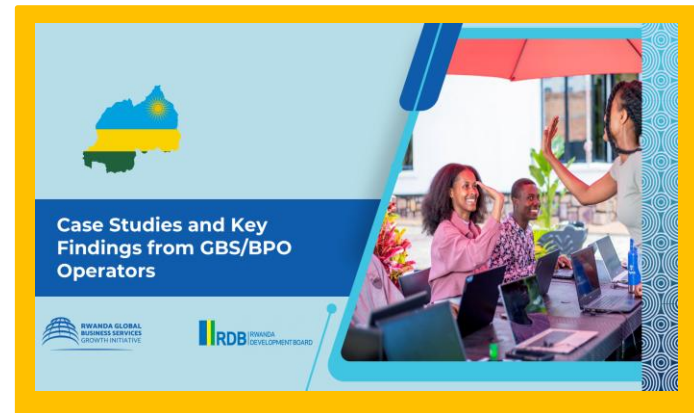
Policy Focus



Policy Focus



Operator Focus





At-a-glance

Rwanda GBS/BPO Country Highlights

Location: East Africa	Kigali Capital City	English & French As the business language
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Major population areas As of July 1, of the year indicated

Kigali	1,329,830 (est.)
Musanze	476,522 (est.)
Muhanga	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 Q2 2025 Economic Growth		28% Corporate Tax Rate	
RWF 1,454.47 to \$1 Exchange Rate (Rwandan Francs to US Dollar)		18% VAT/Sales Tax	

Population Statistics

14.2 Million Est. Total Population (2025)	29.1% / 4.1 Million Est. Youth Population (18-34)	
6.9 Million / 49.1% Est. Male Population	56.9%* / 4.9 Million Est. Employed Population (Q3, 2025)	
7.3 Million / 50.9% Est. Female Population	13.4% Est. Unemployment Rate (Q3, 2025)	
		25.6% NEET** %

*Calculated from working-age population of 8,6 million

**Youth not in employment nor currently in education or training



At-a-glance

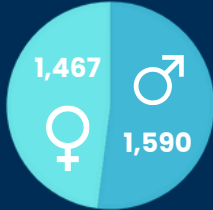
Rwanda GBS/BPO Country Highlights

Major population areas



3,057

Est. GBS International Workforce (2025)



- Est. GBS International Female Workers
- Est. GBS International Male Workers



\$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 Served

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

Key industry verticals served

BFS



Healthcare



Retail



Technology



Telecom



Travel





SWOT Analysis

Strengths, Weaknesses, Opportunities, and Threats

Rwanda's GBS/BPO 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.

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Strengths

1. Youthful, Bilingual Workforce

Over 70% of the population is under 30, with 4M youth (18-35) and over 75,000+ 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

96% 4G LTE coverage and 21,847 km of fibre support digital services; full e-service digitisation targeted by 2029.

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Weakness

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/BPO roles.

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Opportunities

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/BPO 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.

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Threats

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/BPO 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.



Macro Overview

Economic Indicators and Population Statistics

\$13.66 Billion
Gross Domestic Product (GDP)



-0.4%
Inflation Rate (CPI)



\$1,040
GDP per Capita
(as of October 2025)



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



Economic Indicators

Population Statistics



14.2 Million
Est. Total
Population



6.9 Million
Est. Male
Population



7.3 Million
Est. Female
Population



4.1 Million
Est. Youth
Population
(18-34)



4.9 Million
Est. Employed
Population



820,000
Est.
Unemployed
Population

Sources: 1. World Population Review, 2., Worldometer 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).



Smart Infrastructure and Global Connectivity

Major Population Areas and Locations

Location:
East Africa





Kigali the Capital
City of Rwanda
and GBS/BPO
hub



Major population areas





Kigali

 1,329,830 (est.) 

Musanze

 476,522 (est.) 

Muhanga

 87,600 (est.) 



High-Growth, Sophisticated Hub for Global Service Delivery





High-Growth, Sophisticated GBS/BPO Hub

Proven Expertise in CX, ITO and Professional Services

Rwanda's GBS/BPO sector is evolving from a voice-centric launchpad into a multi-specialist delivery hub - anchored in CX services but rapidly diversifying into IT outsourcing, finance, legal, and research functions.

Percentage Split of CX, ITO and Professional Services as Indicated by Rwandan Service Providers

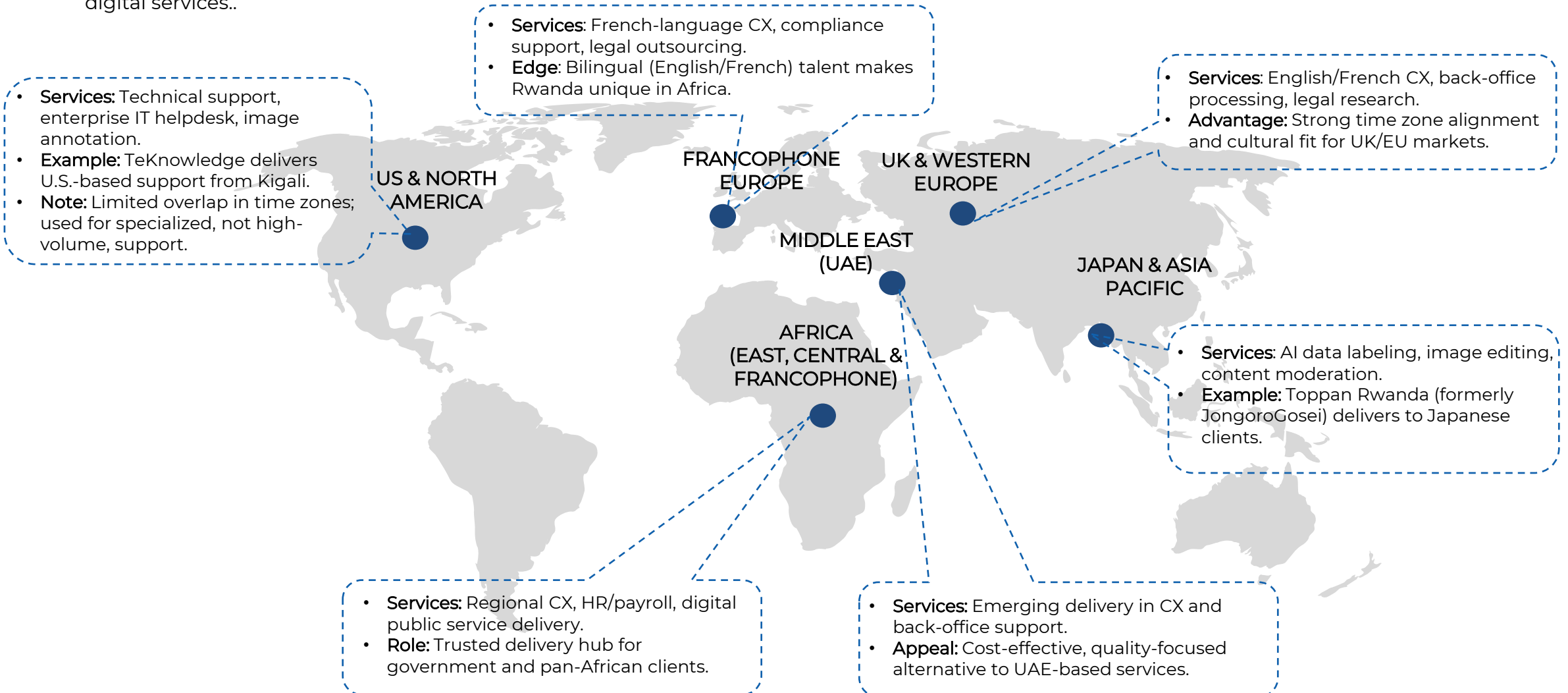




High-Growth, Sophisticated GBS/BPO Hub

Proven Expertise in CX, ITO and Professional Services

The GBS/BPO sector in Rwanda is gaining global traction, delivering niche services to clients across North America, Europe, Asia, the Middle East, and Africa. Its bilingual talent, stable environment, and digital infrastructure position it as a reliable, impact-driven hub for CX, IT support, back-office, and digital services..





High-Growth, Sophisticated GBS/BPO Hub

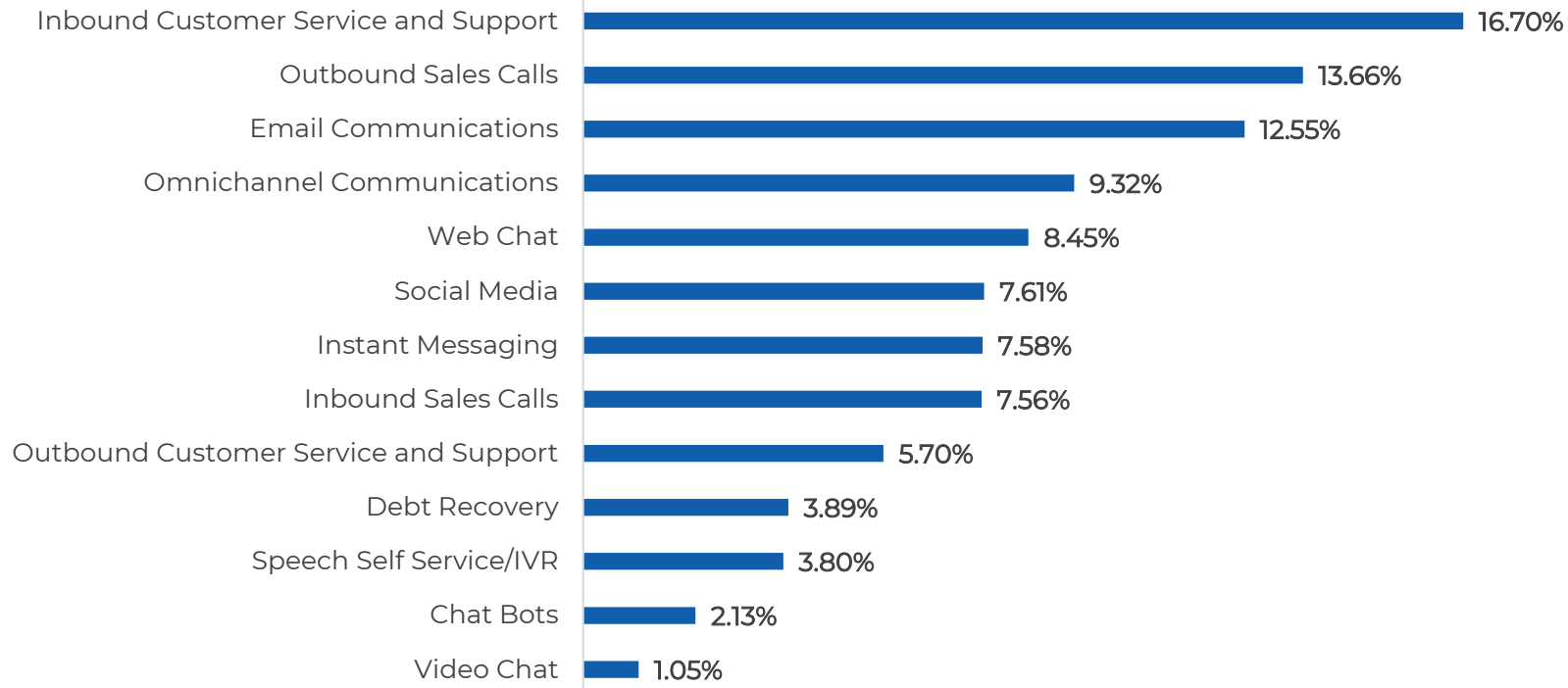
Proven Expertise in CX, ITO and Professional Services



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



High-Growth, Sophisticated GBS/BPO Hub

Strong Sector & Industry-led GBS Growth Initiatives

A vibrant network of over 35 global and local operators drives Rwanda's growing reputation in CX, back-office, and multilingual services, backed by a national GBS/BPO growth strategy targeting 20,000 jobs by 2030.

Proven Global Delivery Across Verticals

35+

service providers delivering CX, back-office, and IT services

Implication / Investor Takeaway

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

4,131

3,494

Domestic Workforce Count International Workforce Count

Expanding Specialisation in Tech Services

Ranked

10th globally

for IT Helpdesk Support by GBS.World

Implication / Investor Takeaway



Strong potential for IT support, cloud, and AI-enabled services

Dynamic Ecosystem of Operators

Key players include TeKnowledge, CareerBox, CCI Global, ISON Xperiences



Implication / Investor Takeaway



Blend of global expertise and local capability enables delivery agility

Time Zone Advantage for Multi-Region Support

Strategically positioned to serve Africa, Europe, and Canada

Implication / Investor Takeaway



Enables 24/7 or extended-hour support across key markets

Scalable National Growth Strategy

GBS Growth Initiative targets

20,000 jobs by 2030

with multi-stakeholder support





High-Growth, Sophisticated GBS/BPO Hub

Exceptionally Competitive Costs & Delivery Models Advantage

Quickly emerging as a GBS/BPO powerhouse, Rwanda offers up to 94% cost savings for global clients while delivering high-quality CX and ITO services at a fraction of the price. With low attrition and a strong inclusion ethos, it's a smart choice as a regional hub or for cost-conscious businesses and saturated markets seeking agility, impact, and operational excellence.





High-Growth, Sophisticated GBS/BPO Hub

Exceptionally Competitive Costs & Delivery Models Advantage



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

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

Source: GBS.World | Genesis GBS Africa Benchmarking and Market Report (2025)



High-Growth, Sophisticated GBS/BPO Hub

Exceptionally Competitive Costs & Delivery Models Advantage



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

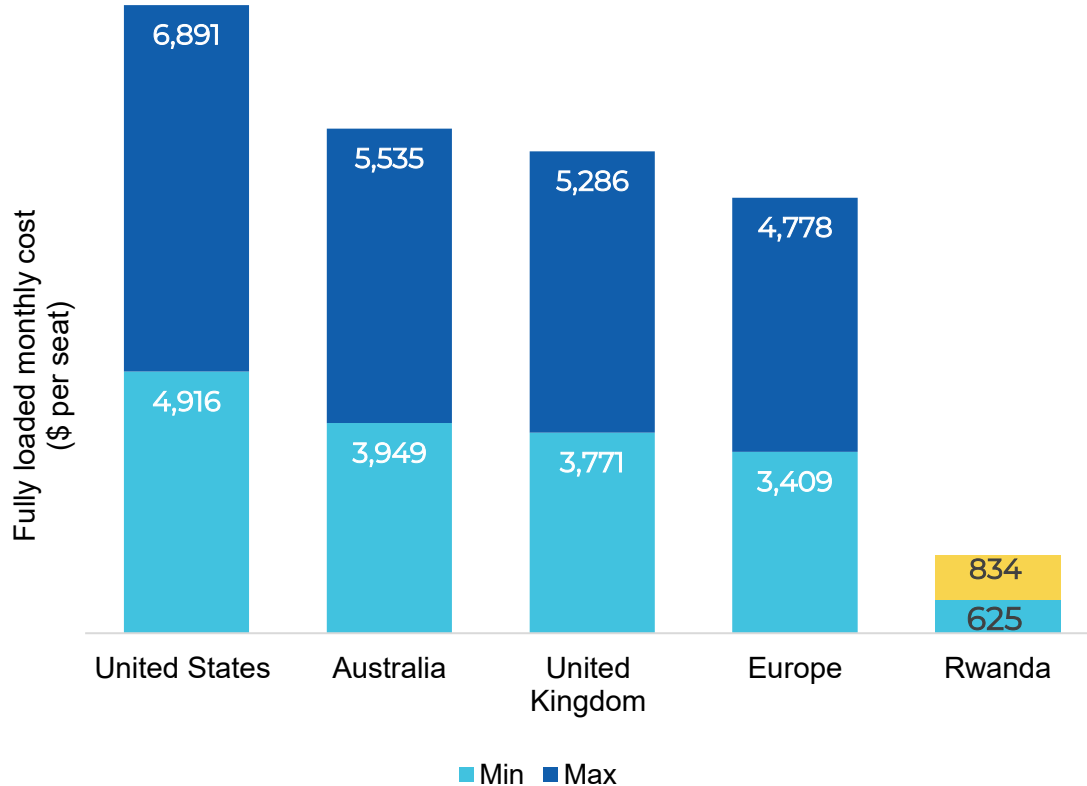


High-Growth, Sophisticated GBS/BPO Hub

Exceptionally Competitive Costs & Delivery Models Advantage (1/2)

Competitor and source market **contact centre/BPO** OPEX comparisons

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



The fully loaded costs comprise of the monthly salary, IT, facilities, admin, operational management, operational functional and other operating costs. Note: OPEX may vary for different operators.

Cost Component <i>(As a % of total fully loaded cost range for Rwanda: \$625 - \$834)</i>	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%

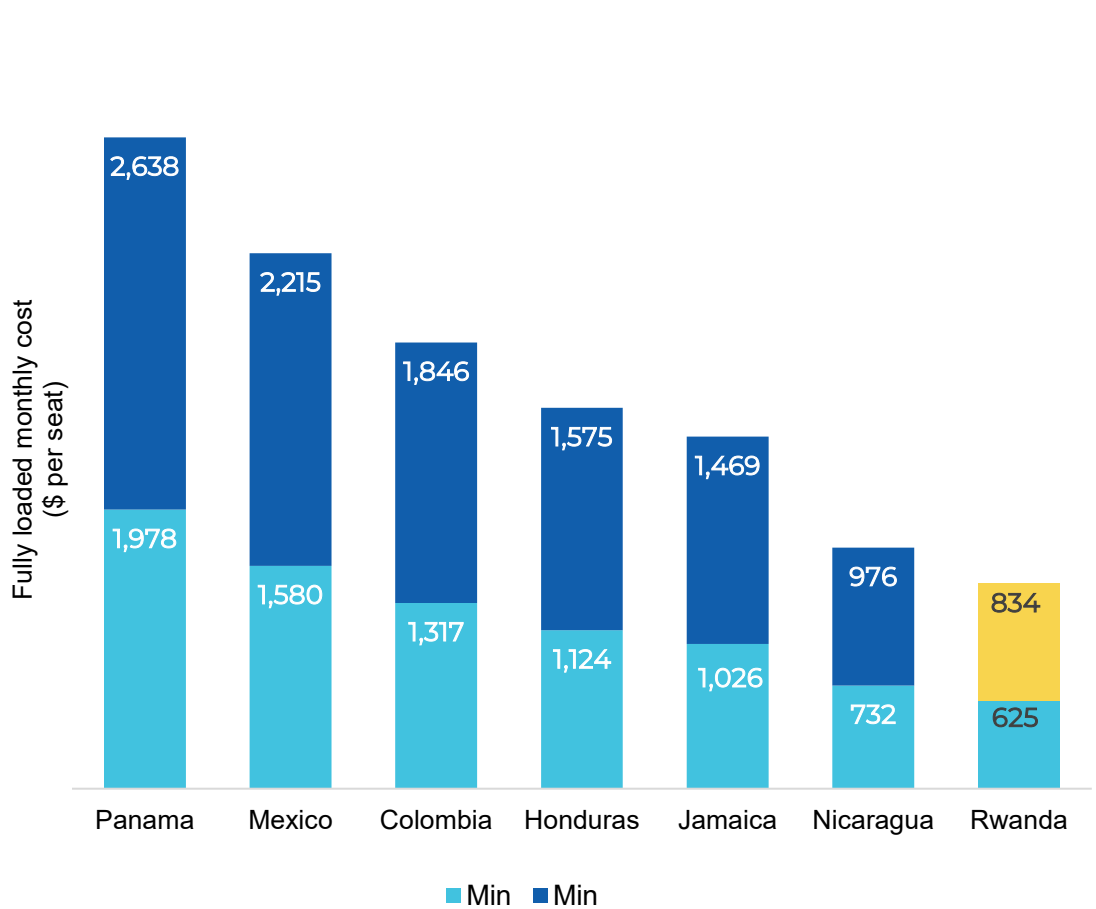


High-Growth, Sophisticated GBS/BPO Hub

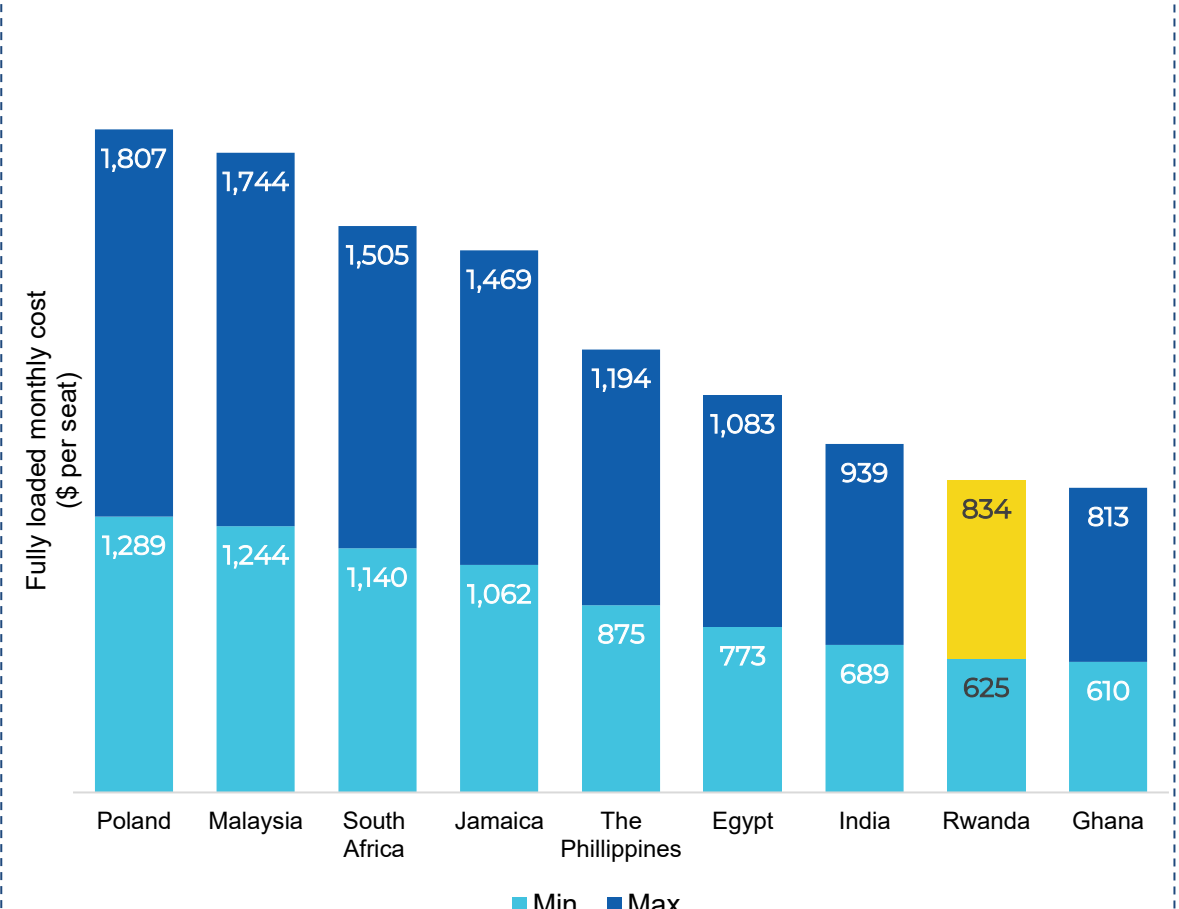
Exceptionally Competitive Costs & Delivery Models Advantage (2/2)

Competitor and source market [contact centre/BPO](#) OPEX comparisons

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



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





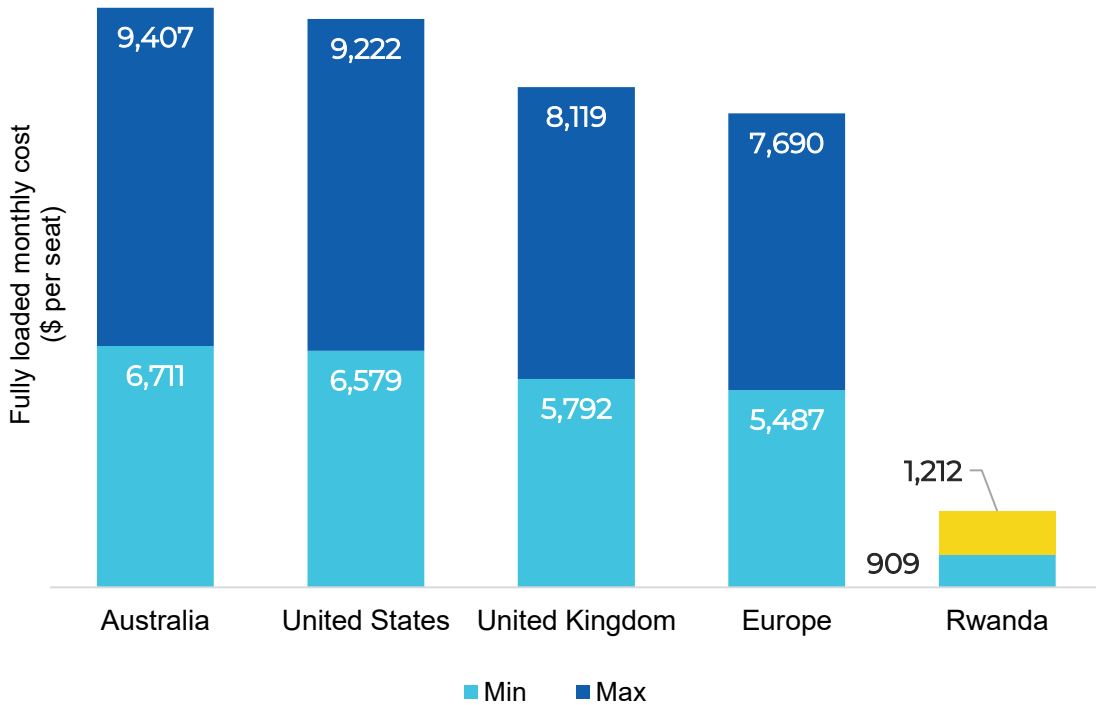
High-Growth, Sophisticated GBS/BPO Hub

Exceptionally Competitive Costs & Delivery Models Advantage (1/2)

Competitor and source market digital/ITO OPEX comparisons

The fully loaded costs comprise of the monthly salary, IT, facilities, admin, operational management, operational functional and other operating costs. Note: OPEX may vary for different operators.

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



Cost Component <i>(As a % of total fully loaded cost range for Rwanda: \$909 - \$1,212)</i>	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%

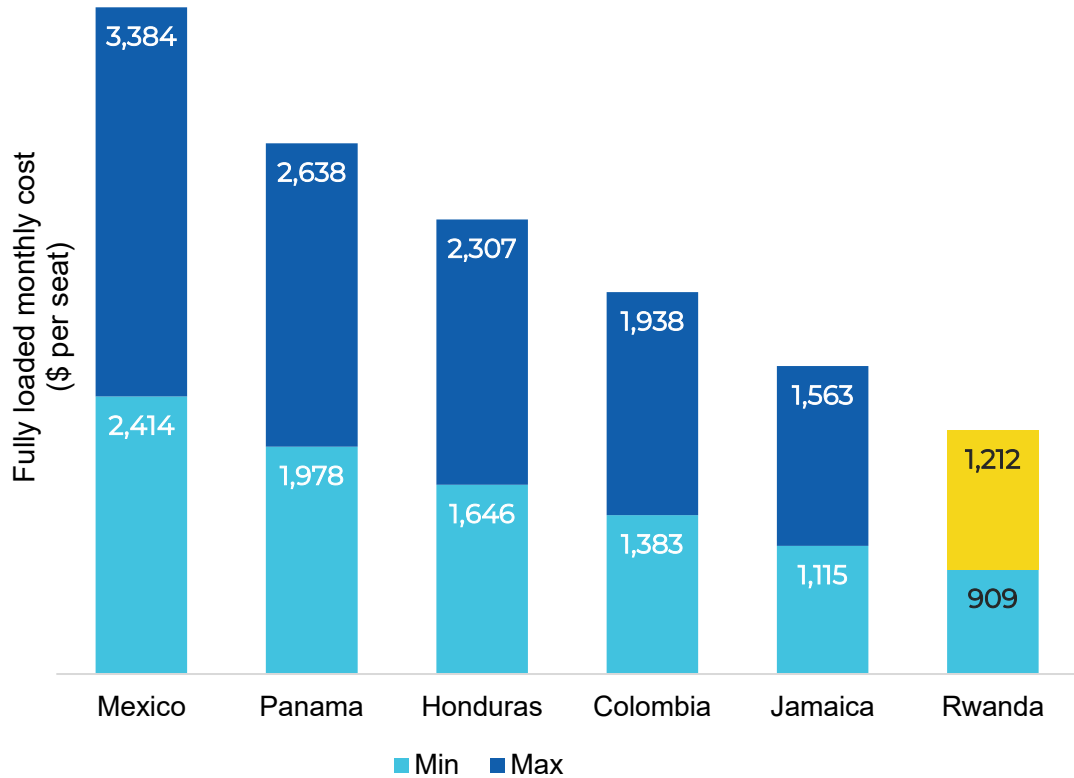


High-Growth, Sophisticated GBS/BPO Hub

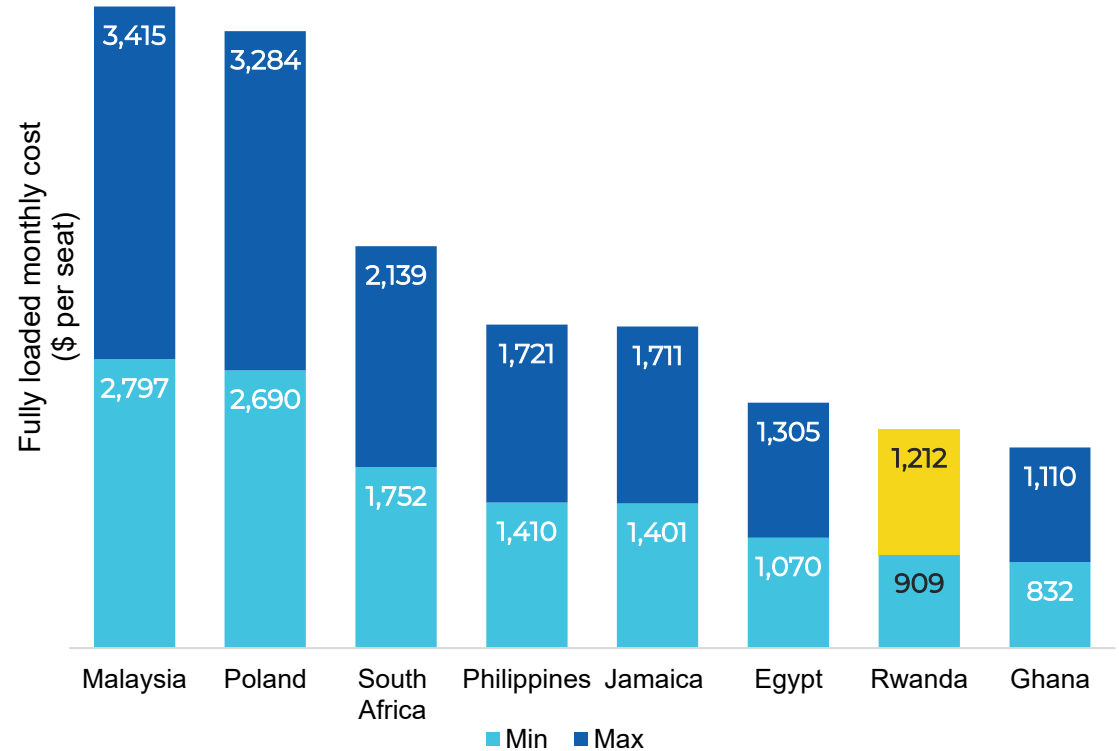
Exceptionally Competitive Costs & Delivery Models Advantage (2/2)

Competitor and source market digital/ITO OPEX comparisons

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.)













High-Growth, Sophisticated GBS/BPO Hub

Ideal Launchpad for Pilots, Scale-ups, and Long-Term Delivery

Rwanda is well-positioned for both pilot-stage operations and scalable, long-term delivery models. Its expanding capabilities in IT support, software development, and AI position it as a sophisticated hub for agile, high-value delivery in Africa.

Strategic Advantage	Supporting Data / Proofpoint	Implication / Investor Takeaway
<p>Ideal for Entry and Expansion</p>	 <p>Market maturity allows for pilots, scale-ups, and long-term delivery</p>	<p>Flexible entry models allow staged investments</p> 
<p>Sector Enables Scaling Pilots to Full Operations</p>	 <p>GBS/BPO sector grew from 6 companies in 2019 to 38 by end-2024 with 1,500 jobs added in 2024 alone</p>	<p>Proven capability and ideal scaling environment for rapid GBS/BPO company growth</p> 
<p>Flexible Co-Sourcing & Delivery Models</p>	 <p>Ecosystem supports dedicated centres and hybrid partnerships</p>	<p>Ideal for buyers wanting operational control without full setup</p> 
<p>Track record of small-scale to strategic growth</p>	 <p>Many GBS/BPO operators have scaled successfully from <50 to 500+ seats in Rwanda over 24–36 months*</p>	<p>Rwanda is field-tested and talent ready for long-term delivery</p> 

* TeKnowledge formerly; Tek Experts scaled from ~50 engineers at launch in Oct-2021 to over 500+ engineers by 2023, achieving this growth in just 24 months through a Rwanda Development Board partnership. CCI Global launched in Kigali and within two years initiated a hiring campaign for 500 call-centre agents, signalling rapid scaling to the 500-seat range. iSON Xperiences expanded its Kigali operations to 300+ employees, demonstrating strong ramp-up though not yet at 500 seats.



Young, Committed and Business-Ready Talent Pool





Young Business-Ready Talent Pool

Scalable Talent & Youth-Powered Workforce

With 89% of its GBS/BPO workforce under age 35 and over 2,000 B2-level English speakers available monthly, Rwanda offers a youth-powered and scalable talent pool. Structured training programmes ensure a continuous pipeline of work-ready, digitally competent professionals.



*CCI Rwanda indicated low attrition rates at 6-10% and Ison Xperience indicated low attrition at 5-7%. See slide 50 & 54 for more details



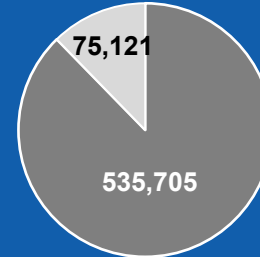
Young Business-Ready Talent Pool

Scalable Talent & Youth-Powered Workforce

Rwanda's GBS/BPO advantage lies in its young, bilingual, and coachable talent pool, backed by rapid skilling pathways and strong upward mobility. This positions the country as a high-value, sophisticated delivery hub ready to scale inclusive digital services for global clients.

Talent Pool

Rwanda's total estimated youth (ages 18-35), unemployed graduates and GBS/BPO full-time addressable talent pool is **535,705**

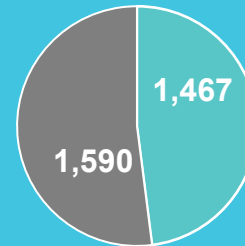


- Total Addressable Talent Pool
- Total B2 English-speaking Addressable Talent Pool

Over **75,121** of these candidates are considered to possess a B2 level

Women Workers

Rwanda's GBS/BPO workforce is **predominantly** made up of women workers

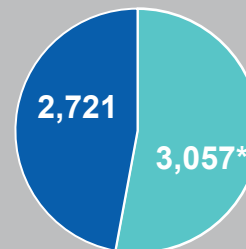


- Est. GBS International Female Workers
- Est. GBS International Male Workers

48% Percentage of Rwanda's GBS/BPO Workforce Consisting of Women

Youth Workers

Impact sourcing is a recruitment model that employs socioeconomically disadvantaged individuals to deliver high-quality services to domestic and international clients.



- Estimated BPO and GBS International Workforce
- Estimated BPO and GBS International Youth Workforce

89% Percentage of Rwanda's GBS/BPO Workforce Consisting of Youth Workers



Young Business-Ready Talent Pool

Scalable Talent & Youth-Powered Workforce

Evidence of the impact of Rwanda's young, motivated talent can be found in global awards where the country is recognized as **Outstanding in Technical & Helpdesk Support** and **Proficient in Customer Service & Support** in the 2024 GBS World Competitiveness Index.

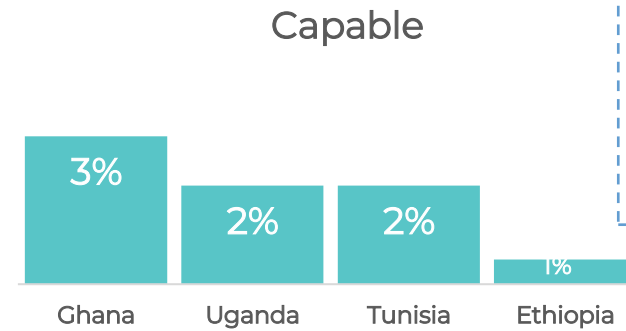
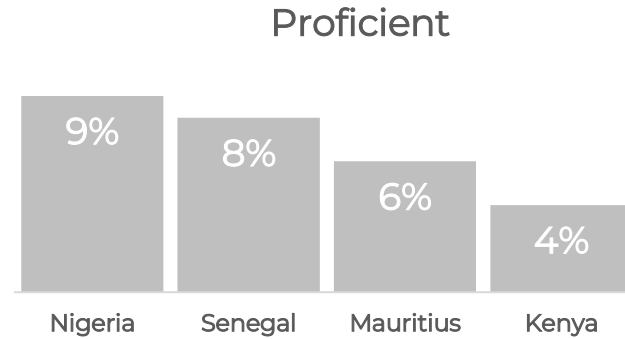
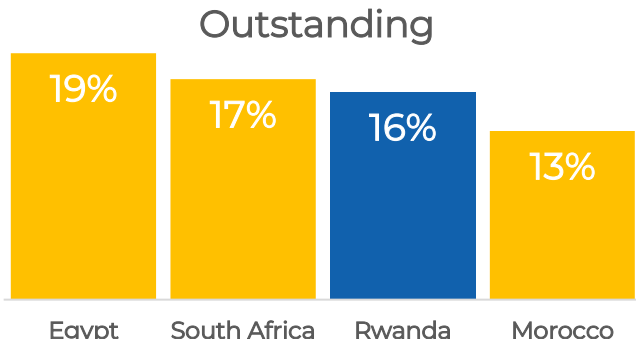


10th globally

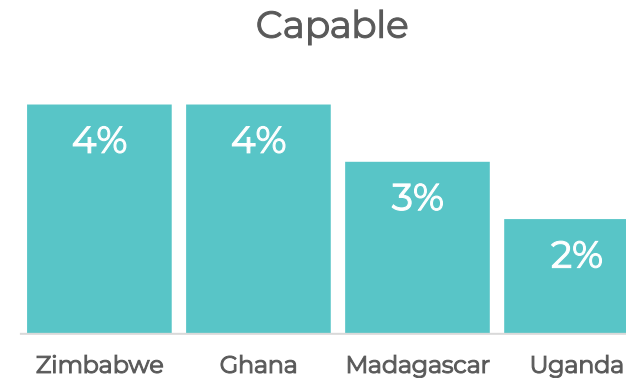
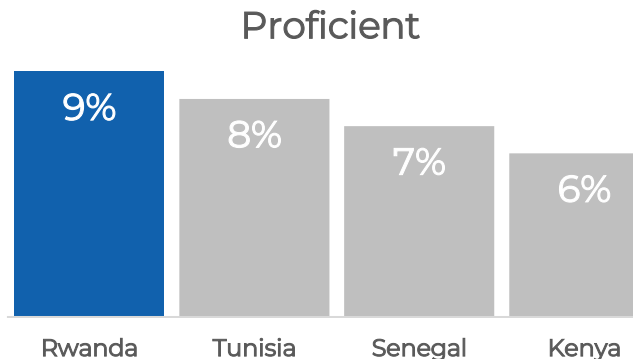
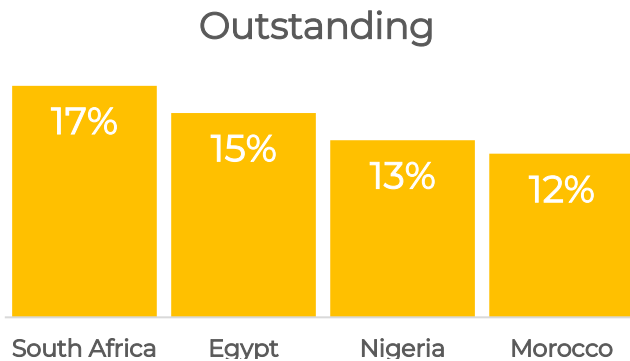
for Technical & Helpdesk Support by



African Region: Technical & Helpdesk Support



African Region: Customer Service and Support

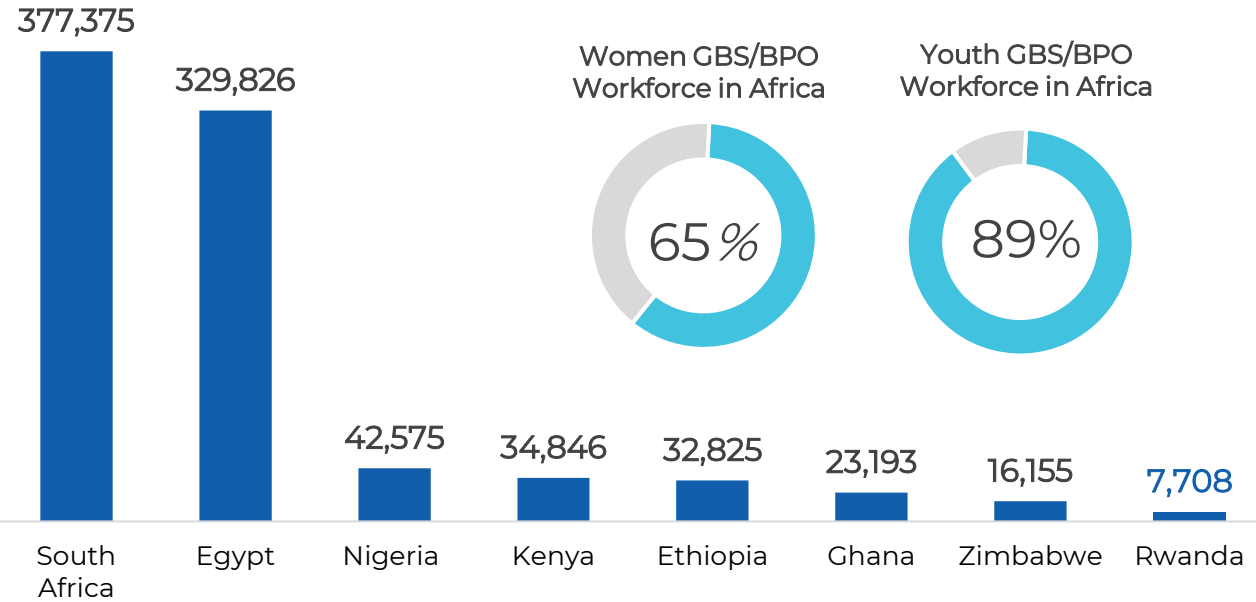


Source: 2024 GBS World Competitiveness Index

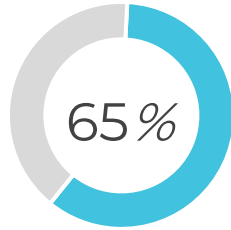


Young Business-Ready Talent Pool

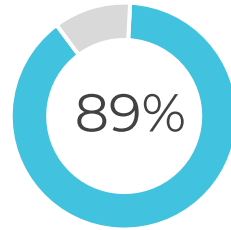
Scalable Talent & Youth-Powered Workforce



Women GBS/BPO Workforce in Africa

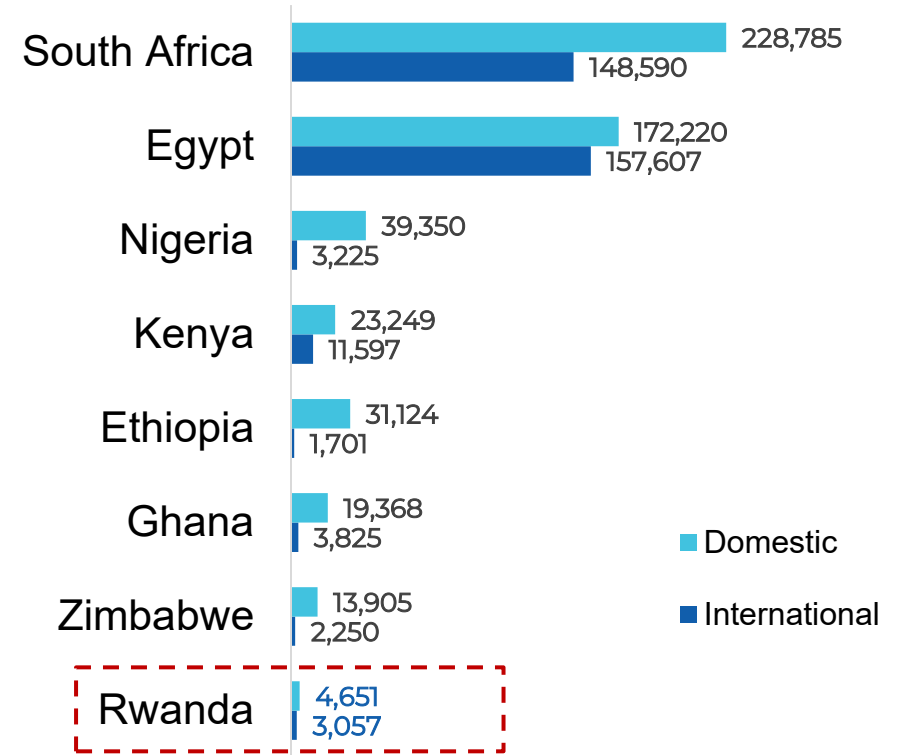


Youth GBS/BPO Workforce in Africa



Includes domestic and international outsourced and shared services operations

Workforce Numbers in Key African Delivery Markets



Rwanda is among the emerging GBS/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).

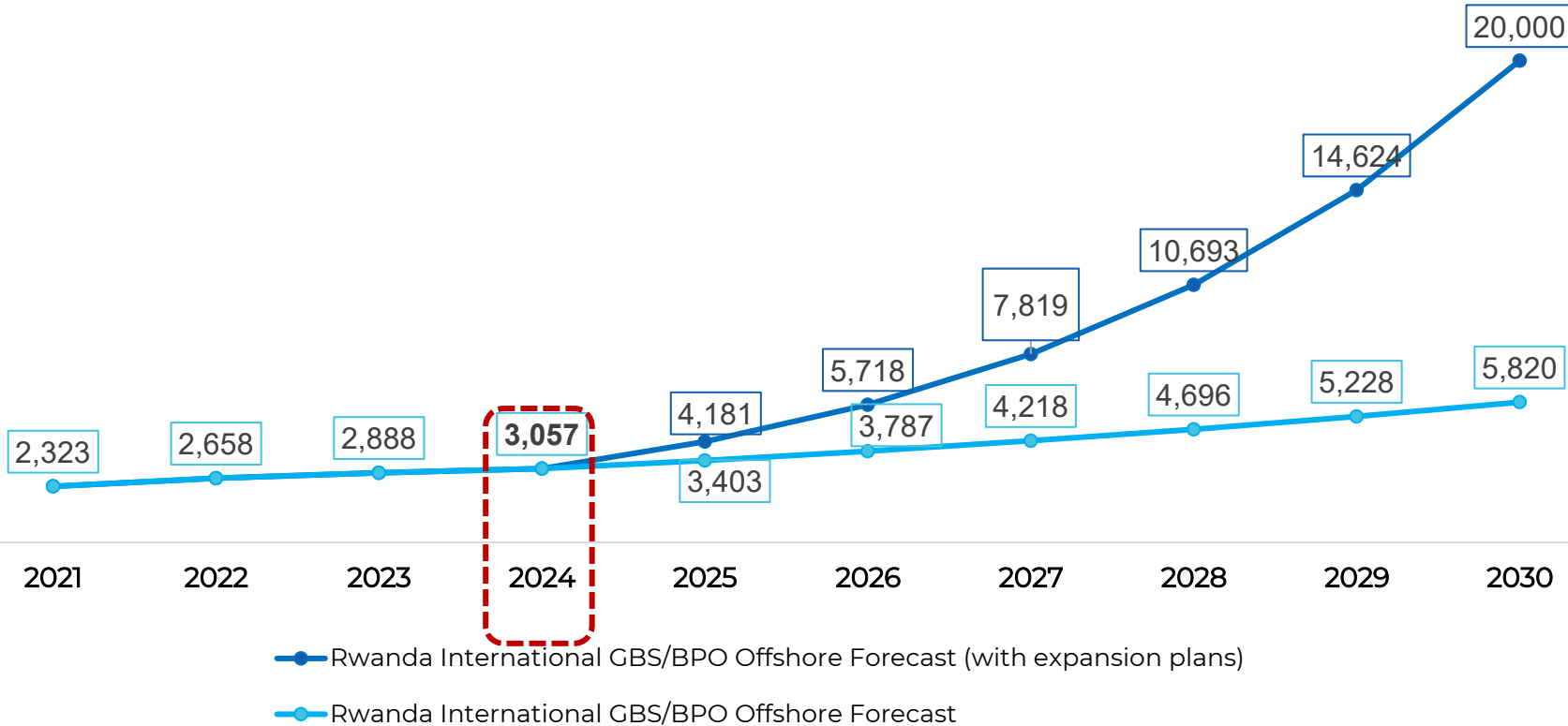


Young Business-Ready Talent Pool

Scalable Talent & Youth-Powered Workforce

At its current trajectory, Rwanda's international* GBS/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 industry target of 20,000 jobs is achieved by 2030 this would translate into a CAGR of 33.7%.

Rwanda International GBS/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.

Strategy to reach Rwanda's 20,000 GBS jobs target by 2030:

Strategy focuses on a multi-pronged expansion approach:

- **Lead Agency:** Rwanda Development Board (RDB), with support from MINICT.
- **City Expansion:** Grow beyond Kigali into Tier 2 hubs (Musanze, Muhanga).
- **Talent Pipeline:** Scale skilling and redeployment in CX, IT, finance, legal, and healthcare (RDB, MINICT, Harambee).
- **Impact Sourcing:** Integrate youth, women, and refugees with NGO and donor support.
- **ESG Positioning:** Brand Rwanda as a boutique, ESG-certified outsourcing hub.
- **Incentives & SEZs:** Expand tax breaks, SEZ facilities, and regulatory support.
- **Digital Infrastructure:** Invest in broadband, cloud, and AI readiness.
- **Global Partnerships:** Attract anchor investors and large operators.



Young Business-Ready Talent Pool

Multilingual Advantage & Work Ethic



High English–French bilingualism, combined with a strong culture of professionalism and dependability, gives Rwanda an edge for international service delivery. Future-fit graduates from four STEM-focused universities further strengthen the country's ability to deliver across diverse verticals.

Multilingual Service Capability

400,000+

bilingual base (English & French), with regional accents well received



English

1.5 million

Reputation for Reliability and Loyalty



Employers cite Rwandans' strong work ethic, low absenteeism, and tenure loyalty



French

826,602

Client Service Orientation Embedded in Culture



Known for discipline, respectfulness, and customer-centric behaviour

Supports high CSAT and culturally sensitive customer engagement



Four STEM-Focused Universities



Institutions include University of Rwanda, Kepler, Carnegie Mellon Africa, etc.

Enhances the availability of digital-ready graduates for higher-value work



Professionalism from Day One



Structured onboarding by local service providers ensures immediate readiness

Reduces supervisory overhead and onboarding friction





Young Business-Ready Talent Pool

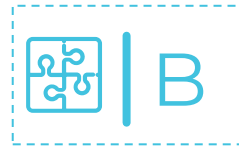
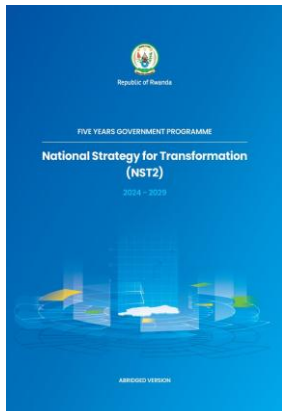
Skills, Training & Workforce Upliftment

Current Training Ecosystem



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.



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, SolMIT, 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.



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.



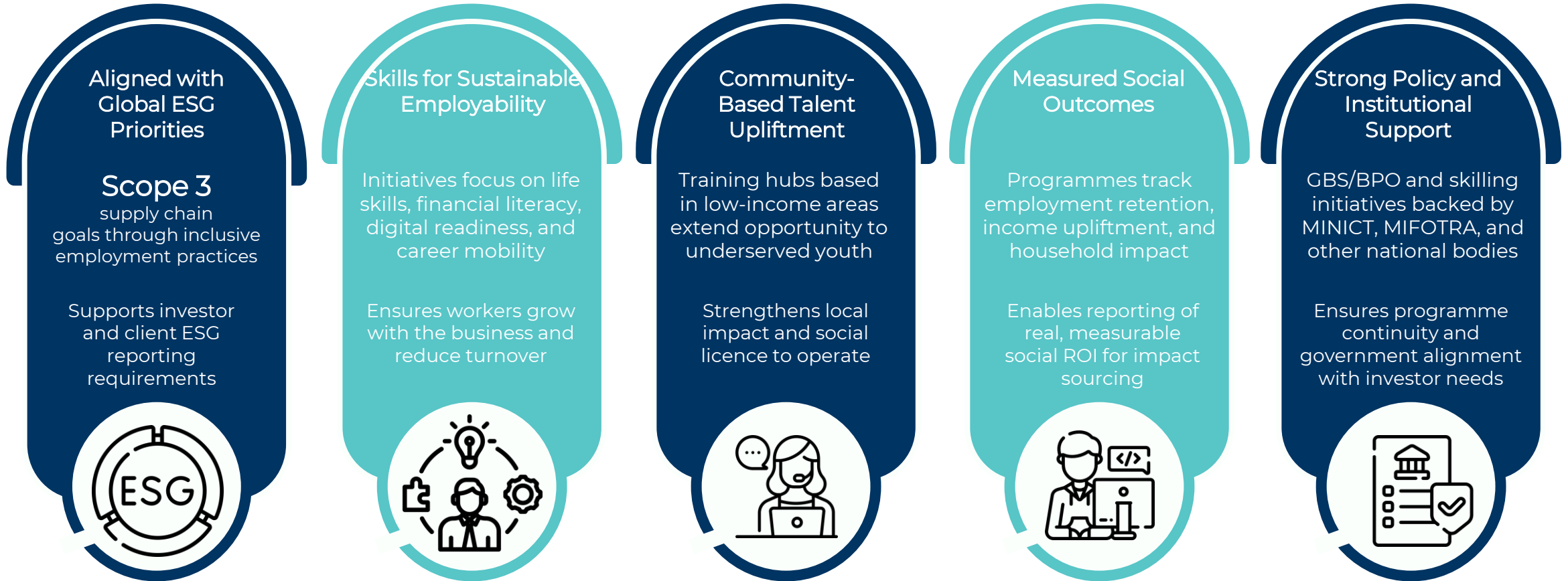


Young Business-Ready Talent Pool

ESG Alignment & Workforce Upliftment



Rwanda supports ESG-aligned delivery through inclusive employment practices and Scope 3 supply chain compliance. Demand-driven skilling programmes such as CareerBox and Harambee equip underserved groups with work-readiness skills while helping employers meet their impact and performance goals.





Young Business-Ready Talent Pool

AI Leadership and Talent Development

Rwanda is positioning itself as a regional AI leader through bold strategy, strong infrastructure, and targeted skills development through its early AI adoption, transforming key sectors and building a future-ready, highly skilled workforce

1. Rwanda's AI Vision and Strategic Leadership

- Approved **National AI Policy (2023)** focused on inclusive growth, innovation, and responsible AI.
- Aims to become "Africa's AI Lab" with at least 6% of GDP from AI-driven sectors.
- Emphasizes AI ethics, education, and inclusive adoption across sectors.

2. Building Digital and Innovation Infrastructure

- Investment in **broadband, data centers, and cloud capacity**.
- Flagship projects like **Kigali Innovation City, Rwanda Innovation Fund, and AI Scaling Hub** (Gates Foundation, 2025).
- Public-private partnerships with Microsoft, Huawei, and local incubators like kLab and Norrsken Kigali.

3. Human Capital and Skills Development

- **Rwanda Coding Academy and Carnegie Mellon University Africa (CMU-Africa)** training next-gen AI engineers.
- Programs like **African Masters in Machine Intelligence (AMMI)**.
- National AI Skills Program and AI literacy integrated into primary and secondary education.

4. AI in Healthcare

- AI-assisted **telemedicine, diagnostics** (e.g., ultrasound), and **smart medical supply chains**.
- Startups like **Viebeg** use AI to optimize hospital procurement.
- Focus on improving rural health access and reducing maternal mortality.

5. AI in Finance and FinTech

- **National FinTech Strategy (2025–2029)** to drive AI use in digital finance.
- AI used in credit scoring, fraud detection, and mobile payments.
- Fintech innovation driving demand for local AI/data science talent.

6. AI in Education

- AI-powered grading tools piloted in primary schools to improve learning outcomes.
- National push for **coding clubs, hackathons, and teacher AI training**.
- Institutions like **RCA and CMU-Africa** provide mentorship and global exposure.

7. AI in Agriculture and Smart Services

- AI delivers **farming advice via mobile phones** for smallholders.
- Government using AI in **smart city management, traffic optimization, and public service automation**.
- Emphasis on practical, scalable, and local-context AI solutions.

8. Global Partnerships and Leadership Role

- Rwanda hosts **Centre for the Fourth Industrial Revolution and Africa's first AI Scaling Hub**.
- Collaborations with **UNESCO, GIZ, Singapore, and The Future Society** on ethical AI governance.
- Leading regional dialogues on **AI policy, regulation, and cross-border collaboration**.



Smart Infrastructure and Global Connectivity





Smart Infrastructure and Global Connectivity

Nationwide Digital Backbone & Transport Network

End-to-end infrastructure supports seamless service delivery - from 96% 4G LTE coverage and advanced cloud platforms to plug-and-play office space in SEZ zones. Reliable transit options and international flight access further enhance Rwanda's operating environment.

Extensive 4G & Fibre Connectivity



96% 4G LTE population coverage; extensive fibre via SEACOM and Liquid Intelligent Technologies

Ensures high-speed, stable connectivity for **24/7 digital service delivery**



Plug-and-Play Real Estate Availability



Move-in-ready GBS/BPO facilities and high-grade offices in Kigali and SEZs

Accelerates setup timelines and lowers CAPEX requirements



Cloud & Data Hosting Infrastructure



Tier 3 data centres and growing cloud ecosystem support IT-enabled services

Enables secure, scalable digital services infrastructure



Kigali's Smart City infrastructure



Includes city-wide free Wi-Fi, smart lighting, traffic sensors, and air-quality monitoring

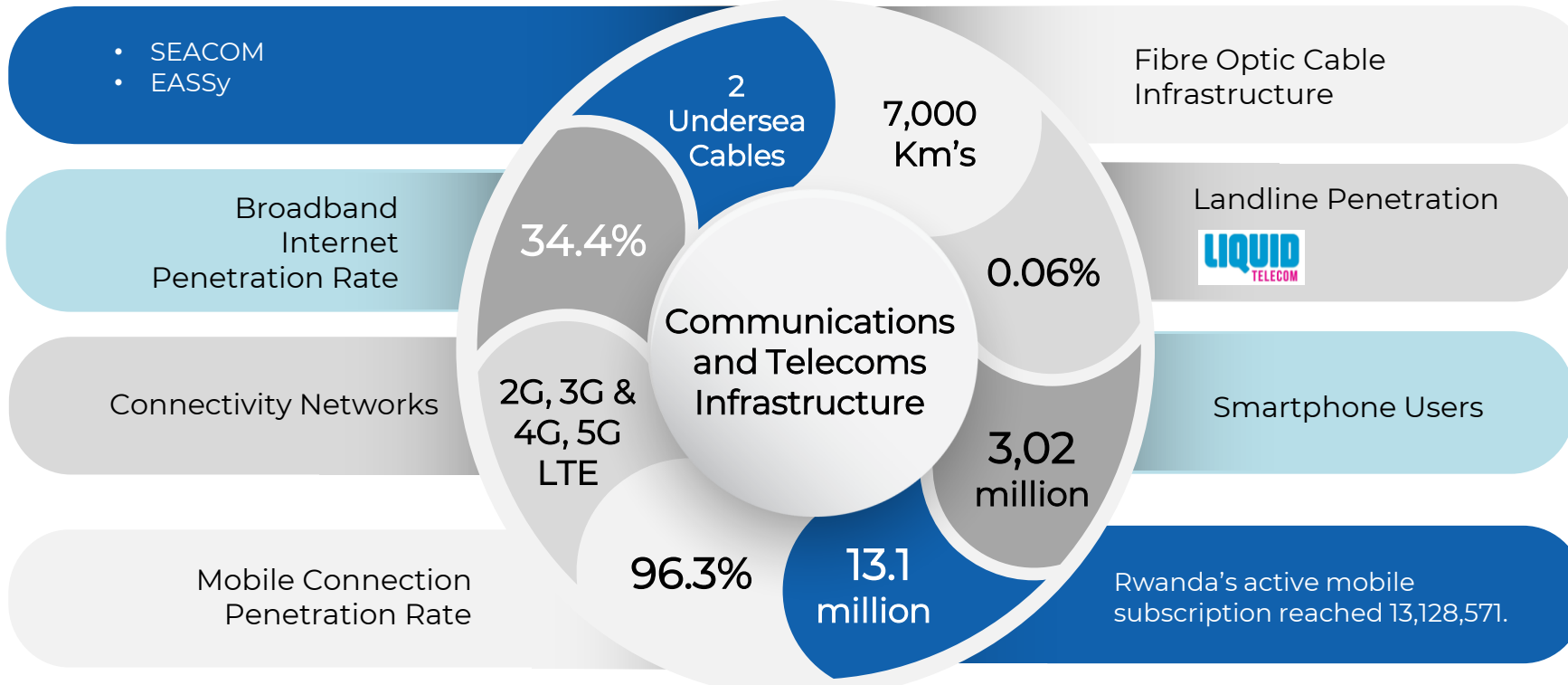
Demonstrates Kigali's readiness to support high-quality, digitally-enabled services





Smart Infrastructure and Global Connectivity

Nationwide Digital Backbone & Transport Network



RISA is at the forefront of all ICT project implementation, research, infrastructure and innovation within the ICT sector in Rwanda. Currently, it is an affiliated institution to the Ministry of Technology. It implements government projects that aim at digitizing services in Rwanda

Communications and Telecoms Costs and Reliability

Services available	Poor	Satisfactory	Good	Pricing
Internet services			Good	250 mbps \$40 - \$50 per mbps 1000 mbps \$20 - \$25 per mbps
VoIP			Good	\$0.19 per minute
Mobile comms			Good	\$0.04 per minute (local) \$0.05 - \$0.29 per minute (international)
Fixed line			Good	\$0.03 - \$0.04 per minute
Fibre			Good	\$100 - \$170 per month
Wireless			Good	\$147 for 90 GB of data per month



Smart Infrastructure and Global Connectivity

Commercial Property Market and Plug-and-Play Office Space

Rwanda offers a mature, expanding real estate ecosystem in Kigali and a promising decentralization strategy through secondary cities. These dynamics create cost-effective and scalable options for investors seeking flexible GBS/BPO delivery models, particularly those targeting impact sourcing, regional resilience, and bilingual service delivery.



Commercial Property Market

Rwanda's real estate market is anticipated to grow by **3.57% annually between 2025 and 2029**, reaching approximately \$110.10 billion by 2029.

Office Space:

Kigali is Rwanda's commercial powerhouse, concentrating the majority of formal office, retail, and mixed-use developments in well-serviced urban zones.

Average Office Rentals Rates

Grade	Ave. Monthly Rent	Location	Occupancy Rate
Grade A	\$16 per m ²	Kigali CBD, Kimihurura	>80%
Grade B	\$12 per m ²	Kacyiru, Nyarutarama	>80%

Key Developments:

Kigali Green Complex, Kigali Innovation City, Gahanga Business Park, Bugesera International Airport



Potential GBS/BPO Facilities

Kigali is well-positioned for **immediate GBS/BPO scale-up**, with **co-working hubs**, like Norrskan, Westerwelle, Impact Hub support start-ups and flexible teams.

Tier 2 Cities

Gradually unlocking commercial potential and "poles of growth" to decongest Kigali

Most Viable Tier 2 Cities for GBS Facilities

- Muhanga (Viability: High-Medium)**
 - Closest to Kigali (approx. 45 min), with some new office space and strong infrastructure. Ideal for satellite operations tapping into Kigali's talent and southern markets.
- Musanze (Viability: Medium-rising)**
 - Third largest city (approx. 476,500) with active CBD redevelopment, good infrastructure, and a growing startup scene. Suited for tourism-linked services.
- Huye (Viability: Medium)**
 - University town with strong bilingual talent and reliable infrastructure. Limited space, but suitable for small, knowledge-based operations.



Smart Infrastructure and Global Connectivity

Globally Accessible & Worker-Friendly Transit Systems

Rwanda's transport infrastructure is reliable, cost-efficient, and globally connected. The strategic expansion of air and road assets, coupled with regional integration efforts and affordable daily commute options, reinforces Rwanda's workplace readiness and delivery stability—essential enablers for a growing GBS/BPO sector.



Air Transport Infrastructure

Kigali International Airport, about 5–12 km from the city centre, serves domestic and international routes with direct flights to **London, Paris, and Brussels**. To boost capacity, Rwanda is constructing Bugesera International Airport, 40 km from Kigali.

Average Flight Times to and from Key International Source Markets

US: 17 hours 3 minutes

UK: 9 hours 3 minutes

Europe: 7 hours 55 minutes

Australia: 14 hours 25 minutes

Asia: 9 hours 7 minutes



Road Transport Infrastructure

7,797 Kms

Total Road Infrastructure Network

Rwanda has good road links to Uganda, Tanzania, Burundi, and DR Congo. Rail lines to Mombasa and Dar-es-Salaam are developing.

Road Transport Fees*

Transport Fees By Mototaxi



Minimum Price of **\$0.31**
Maximum Price of **\$4,0**

Transport Fees by Bus



Minimum Price of **\$0.19**
Maximum Price of **\$4.6**

*Bus and taxi fares in Rwanda vary by distance and route type; prices provided are indicative and may differ depending on the journey.



Digitally-Enabled and Future-Ready for Next-Gen Services

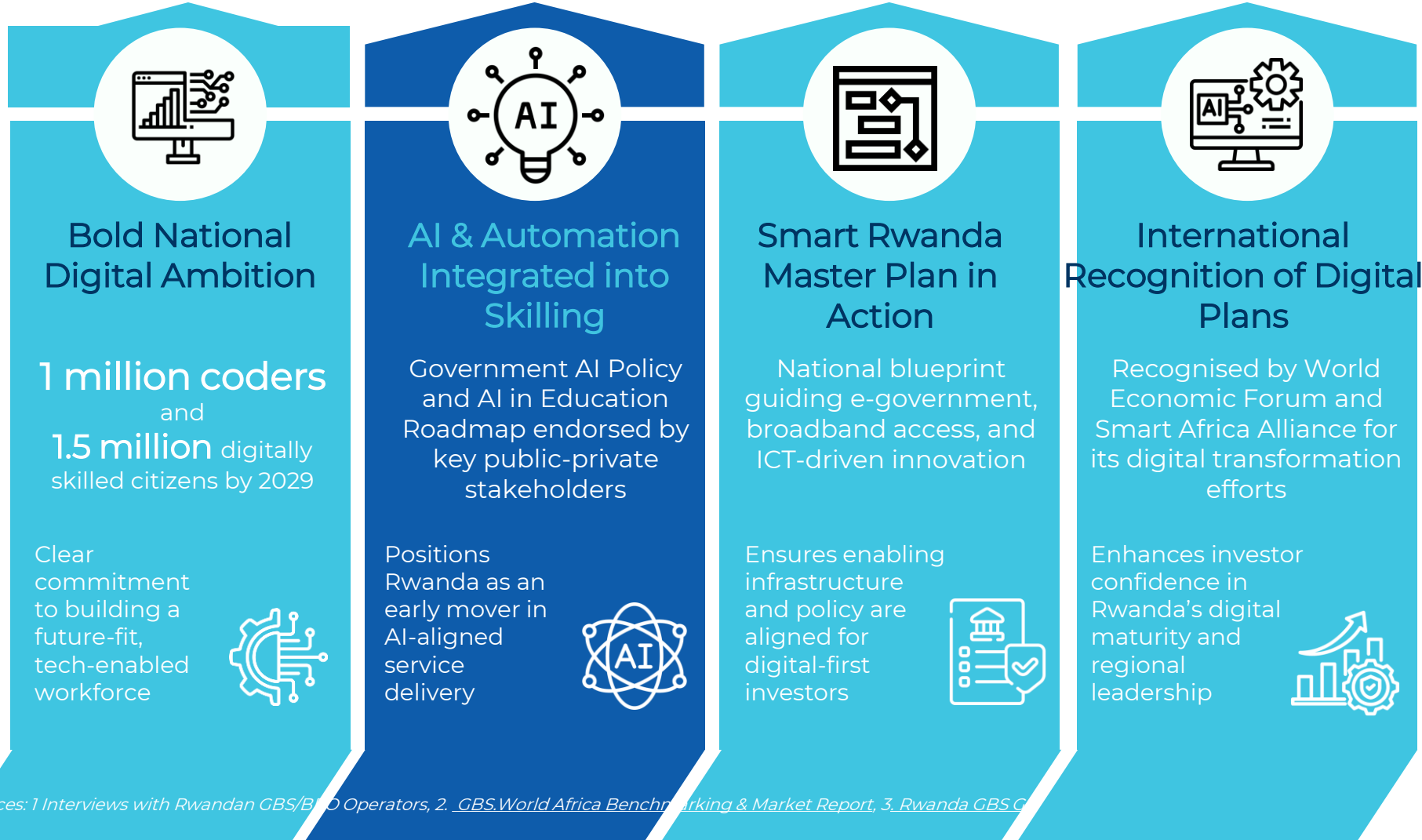




Digitally-Enabled and Future-Ready for Next-Gen Services

Government-Backed Commitment & AI-Ready Strategies

A national vision to digitally upskill 1.5 million citizens and train 1 million coders by 2029 is already underway. Coding hubs, innovation accelerators, and TVET institutions form the backbone of Rwanda's emerging digital workforce ecosystem.



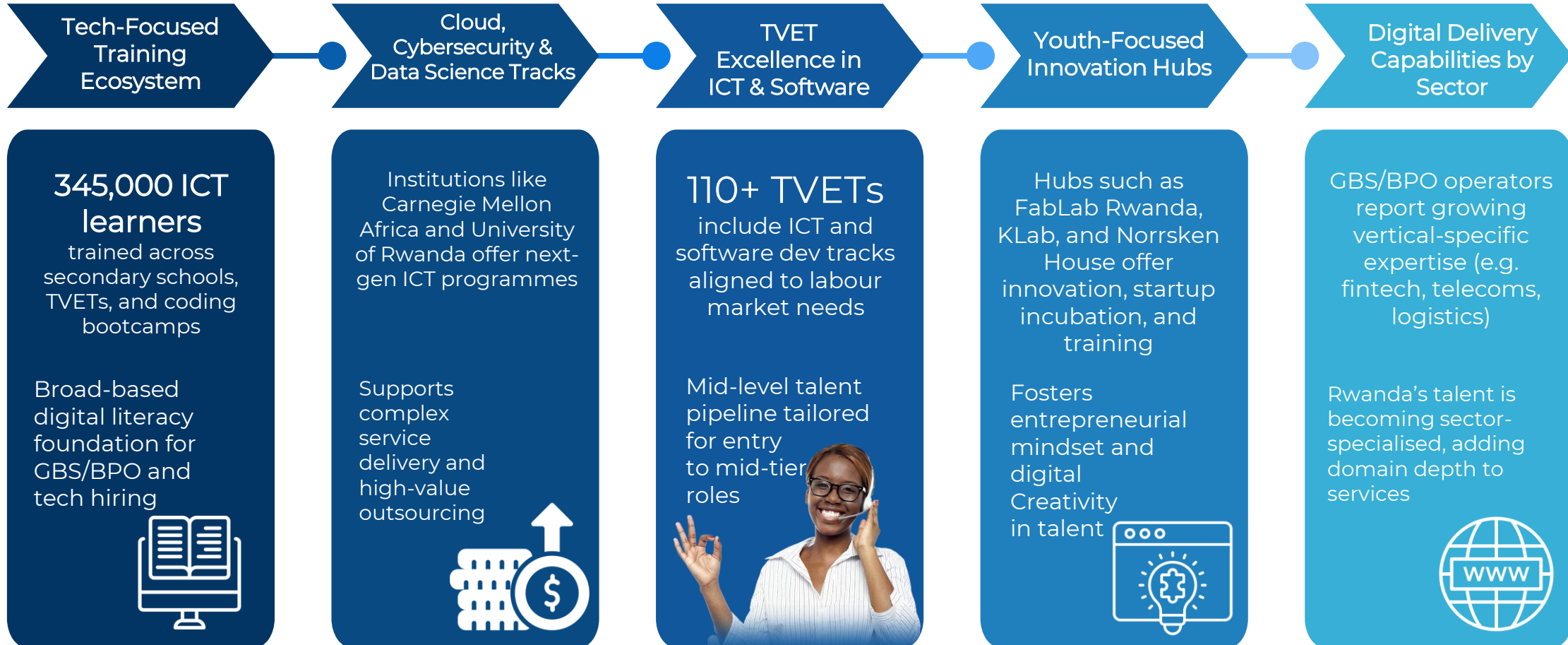
Sources: 1 Interviews with Rwandan GBS/BPO Operators, 2. GBS World Africa Benchmarking & Market Report, 3. Rwanda GBS C



Digitally-Enabled and Future-Ready for Next-Gen Services

Globally Recognised Institutions and Digital Skilling Initiatives

Rwanda's digital skilling strategy integrates AI, automation, and future-ready capabilities. World-class institutions are cultivating in-demand talent in cloud, cybersecurity, and data analytics—preparing the workforce to deliver across tomorrow's digital economy.







Digitally-Enabled and Future-Ready for Next-Gen Services

Globally Recognised Institutions and Digital Skilling Initiatives (1/2)



Rwanda has an extensive and growing pool of ICT learners; about 345,000 in total; spanning formal higher education, technical/vocational training, intensive coding bootcamps, and broad digital literacy initiatives. This cohort includes everyone from university students specializing in computing, to youth in technical colleges learning IT support, to citizens gaining basic digital skills.

Training Pathways	Number of Learners (approx.)	Detailed Breakdown in Rwanda-specific context
<p>Higher Learning Institutions (HLIs) (universities and colleges)</p> 	<p>Estimated 10, 000 students</p>	<ul style="list-style-type: none"> • Enrolled in ICT-related degree programs (Computer Science, IT, Information Systems, etc.) • All public and private HLIs offer ICT courses, though ICT students comprise only approximately 10% of total university enrollment.
<p>Technical and Vocational Training (TVET) Centers</p> 	<p>Estimated 8,000-10,000 trainees</p>	<ul style="list-style-type: none"> • Pursuing ICT-focused trades in technical secondary schools and polytechnics. ICT students make up roughly 10% of TVET enrollment (total TVET enrollment was approx. 83,458 in 2021/22). • Common programs include Networking, IT support, and basic software development. Many ICT support technicians and network technicians are trained at the TVET level

Source: 1. National Institute of Statistics of Rwanda: Statistical Yearbook 2023; 2. MINEDUC; 3. RDB: State of Skills Report 2022; 4. RDB: ICT Skills Snapshot 2022; 5. MINICT; 6. SheCanCODE; 7. Digital Literacy Programme; 8. RISA: Digital Ambassadors Program





Digitally-Enabled and Future-Ready for Next-Gen Services

Globally Recognised Institutions and Digital Skilling Initiatives (2/2)



Rwanda has an extensive and growing pool of ICT learners; about 345,000 in total; spanning formal higher education, technical/vocational training, intensive coding bootcamps, and broad digital literacy initiatives. This cohort includes everyone from university students specializing in computing, to youth in technical colleges learning IT support, to citizens gaining basic digital skills.

Training Pathways	Number of Learners (approx.)	Detailed Breakdown in Rwanda-specific context
<p>Coding Bootcamps and Accelerators</p> 	<p>Estimated 2,000+ participants</p>	<ul style="list-style-type: none"> Rwanda has a growing ecosystem of coding bootcamps, including Klab & FabLab, ALX, WeCode, and SheCanCODE, which have trained a few thousand youths in software development. kLab has incubated 300+ startups, hosted 80+ active ventures, and trained thousands of youth through its Startup Academy, bootcamps, and hackathons. FabLab Rwanda supports 10+ hardware prototypes annually, trains youth in digital fabrication via Fab Academy, and has expanded to 3 regional labs. The women-focused SheCanCODE bootcamp has graduated over 800 female programmers since 2016. The Rwanda Coding Academy, a specialized secondary school, admits about 60 top students annually for advanced programming coursework.
<p>Digital literacy Programmes (community and school-based)</p> 	<p>Estimated 300,000 people</p>	<ul style="list-style-type: none"> Secondary students in Rwanda are now required to attain a Digital Passport (computer proficiency) as a graduation requirement. In 2023–24, the first year of the Digital Literacy Program trained 89,223 participants, including 76,388 students, 11,465 teachers, and 1,370 school leaders. Since 2017, the Digital Ambassadors Program (DAP) has reached over 3.26 million citizens across all districts with basic ICT skills training.

Source: 1. National Institute of Statics of Rwanda: Statistical Yearbook 2023; 2. MINEDUC; 3. RDB: State of Skills Report 2022; 4. RDB: ICT Skills Snapshot 2022; 5. MINICT; 6. SheCanCODE; 7. Digital Literacy Programme; 8. RISA: Digital Ambassadors Program.; 9. FabLab; 10. KLab



Digitally-Enabled and Future-Ready for Next-Gen Services

Globally Recognised Institutions and Digital Skilling Initiatives

These institutions form a diverse and robust talent pipeline of 40 recognised Higher Learning Institutions in Rwanda, including 31 universities and 9 polytechnics/colleges. They collectively produce a steady stream of graduates ranging from high-volume coders and engineers to advanced AI and analytics specialists, thereby positioning Rwanda as a talent-rich hub for global GBS/BPO, digital services, and technology-driven outsourcing.



University of Rwanda (UR)

- **Overview:** Rwanda's largest public university, home to multiple STEM colleges (Engineering, ICT, Agriculture, Health Sciences).
- **Graduates:** In 2024, UR awarded 80,476 degrees, with 64% (approx. 51,500) in STEM fields.
- **Graduates annually:** Roughly 50,000 STEM graduates per year.
- **Digital readiness:** Curricula include computer science, electrical engineering, data science, agritech; supported by strong research activities (85% of publications from STEM).

Source: 1. University of Rwanda, 2. Carnegie Mellon University, 3. ALU Education; 4. MINEDUC.



Carnegie Mellon University Africa (CMU-Africa) – Kigali

- **Overview:** A branch campus of Carnegie Mellon (since 2011), offering advanced master's programs in IT, Electrical & Computer Engineering, and AI.
- Graduates:**
- 2023: Approx. 158 master's graduates
 - 2025: 12th cohort; scalable year-over-year (typically 60–160 grads)
 - **Annual output:** Approximately 100–160 STEM master's graduates.
 - **Digital readiness:** These graduates are highly qualified for advanced roles (software engineering, AI, cybersecurity) and many enter international tech and research jobs.



African Leadership University (ALU) – Kigali

- **Overview:** Innovative Pan-African university focused on entrepreneurial leadership and software engineering.
- Graduates:**
- 2024: Recorded 431 graduates (mix of BSc Computer Science and other disciplines)
 - Operating cohort: Approx. 2,942 enrolled; 76% employment post-graduation
 - **Annual output:** Around 400–500 graduates, with a significant proportion in software engineering.
 - **Digital readiness:** Emphasizes internship-based, mission-led learning aligned with practical tech and leadership skills.



Kepler College Rwanda

- **Overview:** Non-profit, competency-based higher education provider offering U.S.-accredited bachelor's degrees, with a strong focus on digital literacy, project-based learning, and employability for underserved youth.
- Graduates:**
- 2023–2024: Approx. 146 graduates (54% women); cumulative over 1,700 since inception
 - Operating cohort: Approx. 500 students enrolled across Kigali and Kiziba campus
 - **Annual output:** Approx. 140–200 graduates per year, with emphasis on digital and business skills
 - **Digital readiness:** Focus on English fluency, digital tools, project management, data analysis, and soft skills; 90% employment within 6 months through career coaching and work-integrated internships.



Digitally-Enabled and Future-Ready for Next-Gen Services

Globally Recognised Institutions and Digital Skilling Initiatives (1/2)

Rwanda is fast becoming Africa’s digital services hub, with top-tier AI readiness and fully digitised governance; offering investors a seamless, future-ready delivery environment.


AI-Readiness – Rwanda Leading on African Stage

Strategic Advantage


Supporting Data / Proof Point

Implication / Investor Takeaway

Ranked 2nd
African Government
AI Readiness



Only Mauritius, South Africa, and Rwanda scored over 50% in Oxford Insights’ 2024 Government AI Readiness Index





Shows strong policy and infrastructure foundation for AI-enabled service delivery

First national AI strategy in Sub-Saharan Africa



Rwanda’s AI strategy (2023) among the first in region, co-developed with UNESCO & WEF support




Signals early market advantage in AI-led operational models



Digitally-Enabled and Future-Ready for Next-Gen Services

Globally Recognised Institutions and Digital Skilling Initiatives (2/2)

Rwanda is fast becoming Africa's digital services hub, with top-tier AI readiness and fully digitised governance; offering investors a seamless, future-ready delivery environment.

Government – Leading in Digital Governance

Strategic Advantage


Supporting Data / Proof Point

Implication / Investor Takeaway

Jumped 10+ Ranks
UN E-Government Index significant rise



Moved from “middle” to “high” EGDI category in 2022 (0.5489)




Reflects strong adoption of digital services across government

Robust national e-gov services



Systems support online functionalities such as work-permit, tax, land registries, and unified government portals




Offers investors seamless government interaction with digital-first efficiency



Robust Industry Support from Diverse Stakeholders





Robust Industry Support from Diverse Stakeholders

Strong Public-Private Collaboration & Ecosystem Development

The success of Rwanda's GBS/BPO sector is underpinned by the strong private-public collaboration. This is spearheaded by The Rwanda GBS Growth Initiative that advocates the development of the sector and nurturing skills and talent development, while enabling Rwanda as a collective to achieve sustainable, social and just development.

Since its launch in 2023, the Rwanda Global GBS Growth Initiative has overseen the expansion the sector to 38 companies, created over 3,500 jobs (nearly half for women), attracted major international players such as TeleTech, Ojemba, and Moyo Consulting, introduced a standardized BPO training curriculum with its first graduates, produced investor resources and sector reports, and established Rwanda's presence on the global stage through summits and partnerships, positioning the country as a competitive, fast-growing GBS hub.



**RWANDA GLOBAL
BUSINESS SERVICES
GROWTH INITIATIVE**




Launch of GBS Growth Initiative

Through strategic partnerships the initiative aims to foster a conducive environment for GBS sector growth, job creation, and sustainable economic development




Deep Ecosystem Collaboration

The Rwanda Development Board (RDB), GIZ and MINICT support the sector's growth and innovation strategy with ecosystem-wide engagement





Robust Industry Support from Diverse Stakeholders

Workforce Readiness & Social Impact Enablement

Inclusive hiring is central to Rwanda's GBS/BPO model, with clear targets to ensure at least 70% youth, 50% women, 10% refugees, and 5% persons with disabilities in the workforce. This people-centred approach positions Rwanda as a purpose-driven, impact-sourcing hub aligned with global social procurement trends.

Inclusive by Design

High participation of women, youth, refugees, and persons with disabilities (PWDs)



Impact Sourcing Embedded in Ecosystem

Recognised by global buyers for delivering ethical, purpose-led outsourcing



Strong NGO & Private Sector Collaboration



CareerBox* and Harambee deliver scalable, demand-led skilling and placement pathways

Refugee Integration in BPO Talent Pools

130,000

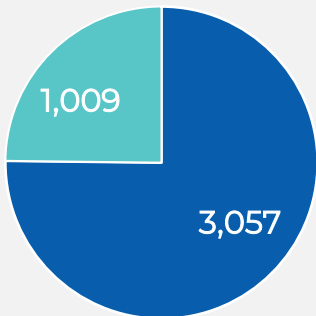
refugees hosted in Rwanda with growing inclusion in CX and IT training programmes

Gender-Forward Hiring Practices

Local providers often exceed 50% female representation in CX and support roles



- Estimated GBS International Workforce
- Estimated GBS International Impact Sourcing Workers



Impact sourcing is a recruitment model that **employs socioeconomically disadvantaged individuals** to deliver high-quality services to domestic and international clients.

Key Benefits:

- ✓ De-risks hiring and ensures job-ready talent tailored to business needs
- ✓ Opens access to motivated, underutilised talent with resilience and adaptability
- ✓ Supports gender equity KPIs and creates diverse team structures

*CareerBox Rwanda primarily trains for CCI Global but is not exclusive to it. It prepares youth for a range of entry-level digital jobs based on employer demand.



Robust Industry Support from Diverse Stakeholders

Streamlined Investment Support & Business Confidence

Strong governance and a pro-investment environment underpin Rwanda's GBS/BPO appeal. Ranked first in Africa for low corruption and second for ease of doing business, the country ensures regulatory clarity, institutional support, and reduced investor risk



Top-Tier Business Environment

1st in Africa
and 17th globally
2024 World Bank B-READY Report

Predictable, investor-friendly regulatory framework



#4 in Africa for Low Corruption

4th in Africa
on Transparency International's
Corruption Perception Index (CPI) 2024

Builds investor trust in governance, compliance, and contract sanctity



GBS-Specific Policy in Place

The Rwanda GBS Growth Initiative (2023) includes a roadmap for job creation and sector scaling

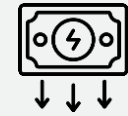
Signals tailored support and long-term commitment to the sector



SEZ & Investment Incentives

Fiscal benefits for GBS/BPO firms located in Kigali Innovation City and other SEZs

Reduces cost of doing business and improves investor returns



High-Level Institutional Coordination

RDB, MINICT, and Ministry of Labour collaborate to fast-track digital and investment reforms

Minimises red tape and improves ease of entry and scaling





Robust Industry Support from Diverse Stakeholders

Streamlined Investment Support & Business Confidence

Member of the World Intellectual Property Organization and adheres to the Paris, Brussels, and Berne conventions, as well as the Hague Agreement.

Strong legal framework ensuring the protection of intellectual property and investment rights.

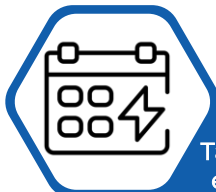
Rwanda has signed and ratified the Multilateral Investment Guarantee Agency (MIGA) Convention.

Provides mediation avenues for disputes involving investors and government entities.)

Established an international arbitration center in 2012 for resolving business-related disputes on both national and international levels.

Guaranteed legal frameworks fostering a safe environment for foreign direct investments.

Key Investment Guarantees



Tailored incentives for early entrants in the GBS market and priority industries



0% corporate income tax for investments exceeding \$50 million with a 7-year tax holiday



Prompt value-added tax refunds to enhance cash flow



Robust Industry Support from Diverse Stakeholders

Streamlined Investment Support & Business Confidence



1

2

3

4

5

6

7

8

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

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)

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

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.)

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

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

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

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*

*Mitigation in place to address potential risk: A ready pipeline of bilingual, pre-screened talent; developed through coordinated up-skilling partnerships (including Harambee, Education First, DSAA/elev8); is actively maintained for rapid deployment into GBS roles. The GBS Growth Initiative also oversees ongoing skills-matching coordination, ensuring strong alignment between training outcomes and employer needs



Robust Industry Support from Diverse Stakeholders

Streamlined Investment Support & Business Confidence

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 workforce 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.



Robust Industry Support from Diverse Stakeholders

Streamlined Investment Support & Business Confidence



Ministry of ICT and Innovation (MINICT)

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



Robust Industry Support from Diverse Stakeholders

Streamlined Investment Support & Business Confidence

Consumer Regulations



Governed by Rwanda Inspectorate, Competition and Consumer Protection Authority (RICA), the Competition and Consumer Protection Policy ensures is the country's overarching consumer and competition policy that aims to ensure that consumers are treated fairly and prevents concentrated competition of a few big market players.

Legislative Environment

Act:
The Companies Law

Detail:
Deals with companies, their registration, responsibilities of company directors, rights of shareholders and other matters.

Act:
Income Tax Act, 2018

Detail:
Streamlines the administration of taxes on income and addresses gaps and gray areas in interpretation associated with the repealed income tax law.

Act:
The Labor of 2018

Detail:
The Labor Law Of 2018 regulates employment and labor issues in Rwanda.

Act:
Intellectual Property Law

Detail:
Creates rights in intellectual property for creators, inventors, innovators, industrial designers and authors and sets out how those rights are to be obtained and enforced and the limits to those rights.

Act:
Commercial Arbitration and Conciliation Law

Detail:
Determines the procedures of arbitration and conciliation to be adopted to resolve commercial disputes.

Act:
Special Economic Zones Regulation

Detail:
Sets out licensing requirements for 'developer' and 'operator' licenses for Rwandan special economic zones.



Robust Industry Support from Diverse Stakeholders

Streamlined Investment Support & Business Confidence

Government Structure



Rwanda operates as a **republic** with a **semi-presidential system**. The **President** is the **head of state**, while the **Prime Minister** is the **head of government**.

Legislative Bodies



Rwanda's parliament consists of **80 members** elected for **five-year terms**, and the **senate has 26 members**, also elected for **five-year terms**. The last elections were held in September 2018.

Legal System



Rwanda's legal system incorporates elements from **German** and **Belgian civil law systems** and **customary law**. The country has not accepted compulsory ICJ jurisdiction..

Rwanda Government Overview



Rwanda Macroeconomic Overview



Economic Growth



Rwanda's economy has shown **consistent growth post-pandemic**: 8.2% in 2022, 10.9% in 2023, and 8.9% in 2024

Trade and Currency



Major **export markets** include China, Germany, and the United States. The Central National Bank of Rwanda manages the economy, with the **Rwandan franc** as its currency as of November 2022.

Regional Integration and Agricultural Economy



Rwanda joined the **East African Community** in 2007 and is part of a plan for monetary union. Farming is the primary occupation, but the government is pushing for a knowledge-based economy and digital advancements.



Case Studies and Key Findings from GBS/BPO Operators





Case Studies and Key Findings from GBS/BPO Operators

Customer Services and Impact

Rwanda is already servicing high-profile clients across Europe (Germany, Netherlands, Spain, UK), North America, and Africa, with offerings ranging from CX and content moderation to AI, ERP, and full-scale software solutions. Rwanda's GBS/BPO sector is clearly not theoretical - it is already delivering measurable value to global companies.

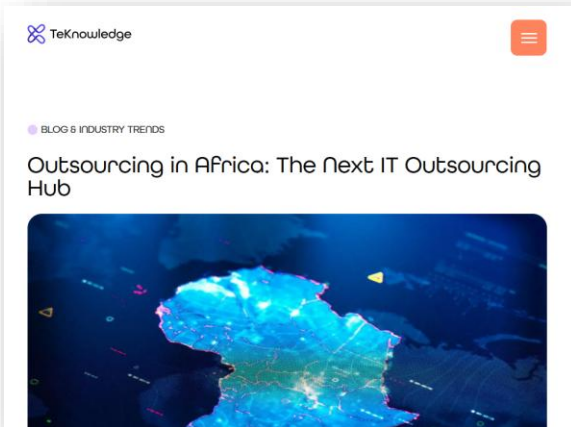
 <h3>CCI Rwanda</h3> <ul style="list-style-type: none"> Clients/Regions: UK & US customer support campaigns Services: Voice-based customer experience (CX), technical helpdesk, customer service Impact: Over 1,000 youth employed (95% first-time workers), 55% women, structured promotion pathways Key Features: Impact sourcing model, low attrition (6-10%), large-scale expansion plan to 1,500 staff 	 <h3>TeKnowledge</h3> <ul style="list-style-type: none"> Clients/Regions: Global clients across Europe and North America requiring AI-integrated support and IT solutions Services: Tech support, cybersecurity, AI/CoPilot integration, digital upskilling Impact: Reduced issue resolution from 2.5 hours to 45 minutes; 49% women workforce; 70% of leadership are women Key Features: DEI-driven growth, advanced AI tools, workforce reskilling into higher-value roles 	 <h3>iSON Xperiences</h3> <ul style="list-style-type: none"> Clients/Regions: Offshore clients in retail, tech sector and e-commerce clients, in UK, US and EU markets. Services: Customer experience (CX), content moderation, data annotation AI support Impact: Multilingual bot deployment. Low attrition (5-7%), inclusive hiring of disadvantaged youth and PWDs, Key Features: Cloud-based AI tools, NGO partnerships for talent sourcing, proactive use of self-service CX tech 	 <h3>AmaliTech</h3> <ul style="list-style-type: none"> Clients/Regions: European IT clients (via Cologne HQ, Germany) Services: Software development, IT support, customer experience (CX) services Impact: Linked 100+ Rwandan trainees to global clients; over 90% of successful graduates employed at the service centre Key Features: Strong inclusion focus (youth, women, PWDs), founding member of DSAA, reinvests client revenues into training and ecosystem development 	 <h3>Awesomity</h3> <ul style="list-style-type: none"> Clients/Regions: Government of Rwanda, Volkswagen Rwanda (Move), NSFO (Netherlands), Hallo (Spain/Netherlands), Global Climate Services: Custom software development, mobile apps, AI/ML, ERP systems, UX/UI design Impact: Supported over 100,000 rides via VW's mobility app; modernized government and agri-tech systems; delivered scalable digital solutions for European markets Key Features: Agile delivery, global design awards, strong UX expertise, and rapid MVP development
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Case Studies and Use Cases | Case Studies : TeKnowledge (1/2)



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



"60% of initial engineers promoted to advanced roles"

"95%+ client satisfaction scores achieved"

"Scaled from about 50 engineers in 2021 to nearly 200+ by 2022, with continuous upskilling and promotions into leadership roles."

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.



TeKnowledge **CASE STUDY**

Synergizing Success: How a Tech Giant Achieved Operational Brilliance

Impact

Exceptional Performance:

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

Rapid Growth:

- "6,000+ employees across 19+ hubs on four continents; including Rwanda; showcasing considerable global scale and expansion" based on website

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.

"\$75 million in at-risk contracts retained through proactive customer-success interventions."

"24/7 "follow-the-sun" support model ensuring seamless operations across time zones"

"Zero service disruption during COVID-19, backed by strong business continuity planning and WFH enablement."

***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.*



Case Studies and Use Cases | Case Studies: Microsoft (1/2)



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.



RWANDA: Cloud in Public Sector
An Interactive Guide for Legal and Compliance Professionals



Rwanda: Cloud in Financial Services
An Interactive Guide for Legal and Compliance Professionals

“Azure & Office 365 drive secure, cost-saving digital transformation.”

“Microsoft supports Rwanda’s public sector with efficient, compliant cloud solutions”

“Financial institutions gain secure, scalable, regulation-ready platforms.”

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

- Microsoft's education partnerships in Rwanda have reached **3.2 million students** and **65,000 teachers**, with connectivity projects covering around 3,500 schools.
- Local teacher training has upskilled **64 Rwandan educators**, enhancing digital teaching capacity.
- Across Africa, Microsoft's Virtual Academy 4Afrika has provided digital training to **1.6 million learners**, while **1,600+ graduates** have been placed in jobs through Interns4Afrika and AppFactory.
- Microsoft's SME support programs have helped **hundreds of Rwandan businesses** digitise and scale operations.

"65,000+ teachers & 3.2M students reached through Microsoft's education initiative"

"Rwanda's Akaliza Keza Gara joins Microsoft's 4Afrika Youth Advisory Board.."

"65,000+ teachers & 3.2M students reached through Microsoft's education initiative"

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.



Case Studies and Use Cases | Case Studies: Other examples (1/2)



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.

kLab and FabLab (Innovation & Prototyping Hubs)



- **Type & Purpose:** kLab is a digital innovation hub nurturing start-ups, while FabLab extends this to hardware and prototyping, enabling innovators to design, test, and scale products.
- **Backers:** Jointly supported by MINICT, Rwanda ICT Chamber, RDB, JICA, MIT, SolidWorks, and Gasabo3D, with partnerships across academia and private sector.
- **Role in Ecosystem:** Serve as national entry points for entrepreneurship, digital fabrication, and applied skills development, producing dozens of projects annually and inspiring regional expansion of innovation spaces.
- **Success Example:** Through FabLab, Rwandan innovators developed *DMM.HeHe's* smart logistics and e-commerce solutions, which scaled from a student project into one of Rwanda's leading tech firms, now powering digital retail for thousands of local businesses.

Centre for the Fourth Industrial Revolution (C4IR) Rwanda



- **Type & Purpose:** A policy and governance centre established with the World Economic Forum to shape Rwanda's approach to emerging technologies like AI, IoT, and blockchain.
- **Backers:** Formed through partnership between the Government of Rwanda (MINICT, RDB) and the World Economic Forum.
- **Role in Ecosystem:** Acts as a thought leader and regulatory sandbox, piloting AI and data policies, driving Rwanda's national AI strategy, and positioning the country as a continental leader in responsible 4IR adoption.
- **Success Example:** C4IR supported the design of Rwanda's AI Policy (2021) and launched Africa's first Data Policy Sandbox, enabling secure cross-border data flows that make Rwanda a testbed for global tech investors.



Kigali Innovation City (KIC)

- **Type & Purpose:** A mixed-use, smart innovation city within the Kigali Special Economic Zone, designed to host universities, R&D labs, corporates, and start-ups to drive Rwanda's knowledge economy.
- **Backers:** Developed through partnerships with Africa50, Mastercard Foundation, and flagship universities such as CMU-Africa, ALU, and AIMS.
- **Role in Ecosystem:** Serves as Rwanda's flagship innovation precinct, producing 4,400+ STEM graduates annually, aiming for 50,000 new jobs and \$150M in ICT exports.
- **Success Example:** Carnegie Mellon University Africa (CMU-Africa), housed in KIC, has become a continental leader in advanced ICT training, with over 90% of graduates employed in Africa's tech sector within a year of graduation.



Norrskan Kigali House

- **Type & Purpose:** An entrepreneur and social innovation hub, hosting one of Africa's largest startup campuses to scale ventures in fintech, climate tech, healthtech, and impact entrepreneurship.
- **Backers:** Established by the Norrskan Foundation (Sweden), with partnerships that connect Rwandan start-ups to international funders and accelerators.
- **Role in Ecosystem:** Provides co-working, mentorship, and acceleration for high-impact start-ups, making Kigali a magnet for East Africa's entrepreneurial talent.
- **Success Example:** Ampersand (e-mobility start-up) grew from Norrskan Kigali House to become Africa's leading electric motorbike company, now deploying thousands of e-bikes across Rwanda and expanding to Kenya.



Zipline






- **Type & Purpose:** A drone-based medical logistics company providing rapid delivery of blood, vaccines, and essential medicines to remote and rural areas.
- **Backers:** Backed by the Government of Rwanda, international VCs, and development partners who helped scale the first national drone delivery system.
- **Role in Ecosystem:** Positioned Rwanda as a global pioneer in drone regulation and health tech adoption, integrating unmanned aerial vehicles into national logistics.
- **Success Example:** Since launch in 2016, Zipline has completed over 500,000 commercial deliveries in Rwanda, reducing medical supply delivery times by up to 75% and inspiring replication in Ghana, Nigeria, and the U.S.



Case Studies and Key Findings from GBS/BPO Operators

Insights from GBS/BPO Companies in Rwanda

Insights confirm Rwanda's rise as a high-quality, agile GBS/BPO destination. With bilingual talent, rapid hiring, low attrition, and strong government backing, Rwanda is delivering real value in CX, IT, and digital services - proving itself a credible and impact-driven choice for global outsourcing.

Core Themes	Analysis	Supporting Quote
1. Language Advantage & Market Fit 	<ul style="list-style-type: none"> Bilingual (English/French) talent with neutral accents. Ideal for US, UK, Canada, and Francophone Europe. Supports voice and omnichannel delivery from a single hub. 	<p><i>"The spoken English is very good...there is no slang. It's quite relevant to UK and US. You also find French proficiency - suitable for European and Canadian markets."</i> iSON Xperiences</p>
2. Talent Readiness & Impact Sourcing 	<ul style="list-style-type: none"> Fast, scalable youth hiring with job-readiness support. Inclusive focus: women, PWDs, underserved youth. Low-cost, high-adaptability talent pool. 	<p><i>"Whenever my global team asks how quickly I can hire, I tell them I can hire 100 people in five days - Harambee has always been supportive."</i> CCI Rwanda</p>
3. Government Backing and Ecosystem Synergy 	<ul style="list-style-type: none"> Strong policy alignment and investment facilitation. Public-private coordination accelerates onboarding. Strategic focus on digital jobs and GBS/BPO growth. 	<p><i>"The reason for the speed of development... is the collaborative nature of the ecosystem, with government playing a big role in bringing all inputs into one strategy."</i> The Gym</p>
4. Quality-Driven Service Delivery 	<ul style="list-style-type: none"> Emphasis on high-quality over high-volume. AI, ERP, and IT support services scaling fast. Workforce upskilled into tech and digital roles. 	<p><i>"AI reduced average resolution time from 2.5 hours to 45 minutes. We now need fewer staff for basic operations and reallocate them to higher-value roles."</i> TeKnowledge</p>
5. Reliability, Retention & Sector Credibility 	<ul style="list-style-type: none"> Low attrition (6–10%) and strong staff loyalty. Trusted delivery for global clients. Clear path to scale with reliable execution. 	<p><i>"Our attrition rate is around 6–10% annually, which is very low for the sector. Purpose-driven engagement keeps staff motivated."</i> CCI Rwanda</p>



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 1,000 people.



Number of Operations in the Country:	1
Major Points of Presence	Kigali
Operating Years in Rwanda	2
Total Seats/Agents/Knowledge Workers	1,045*
Global Markets Served	Africa, North America, Middle East, Europe, APAC, Africa

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

Vertical Industries Served

- 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





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 Served	Africa, North America, Middle East, Europe, APAC, Africa

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

Vertical Industries Served

- 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



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 Served	Europe, North America, Latin America, Africa, Asia - Pacific

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

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.

Vertical Industries Served

- 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



Robust Industry Support from Diverse Stakeholders

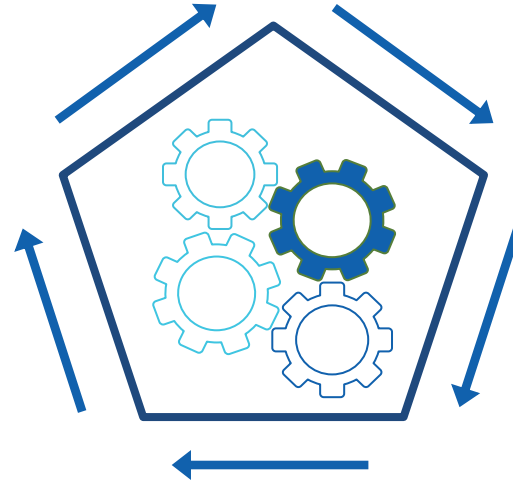
Operational Risks and Challenges

Infrastructure Challenges

The country's **electricity access rate** is **82%**

Only **30%** of Rwanda's roads are paved, complicating transport of goods

Although internet penetration is growing, at **38%**, it **remains a barrier for tech-reliant businesses** and digital expansion



Dependence on Agriculture

Agriculture employs about **60%** of the population and contributes **24%** of GDP, making the economy **highly vulnerable to climate change**

A large portion of the agricultural sector is subsistence-based, **limiting its potential for large-scale production** and exports of farmers are engaged in subsistence farming, **producing for home consumption rather than for commercial purposes**

70%

Landlocked Geography

As a landlocked country, **Rwanda depends on ports in Tanzania and Kenya for international trade**, leading to increased costs and delays

Any **disruption in neighbouring countries'** transport infrastructure or political stability **affects Rwanda's supply chain and trade**

Cost of exporting and importing goods in Rwanda is **40–50% higher** than in coastal countries

Limited Skilled Workforce

There remains a **mismatch between the skills taught and the needs** of the labour market

It is estimated that only **8–10%** of Rwanda's workforce is highly skilled

55% of Rwanda's labour force is **unskilled**, dominated by workers in subsistence agriculture and informal sectors

Financial System Constraints

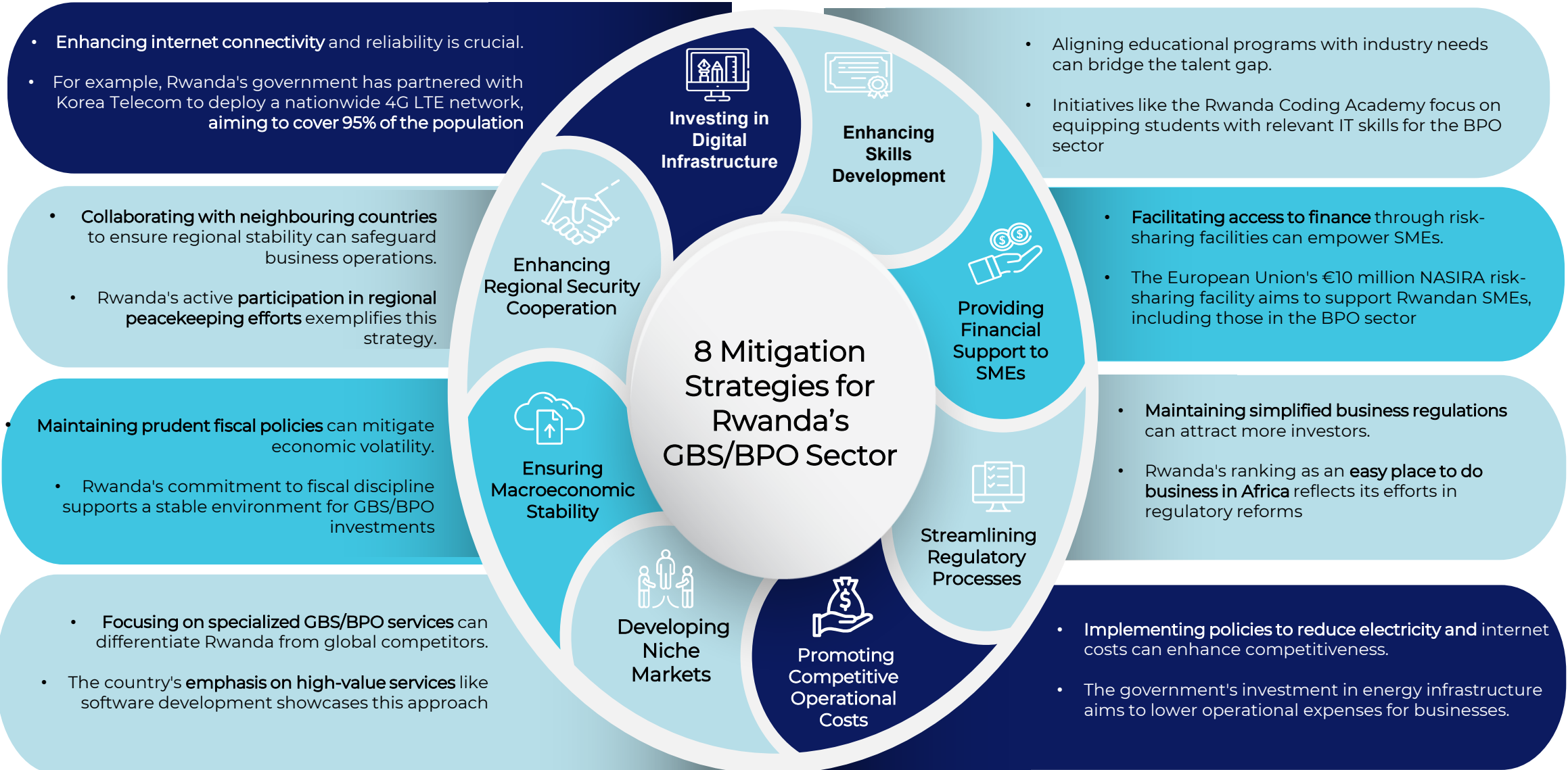
Small and medium-sized enterprises (SMEs), which form the backbone of the economy, struggle to access affordable financing. **Interest rates often exceed 15%**

Businesses reliant on imports face **risks from currency volatility**, especially given the high use of the US dollar in trade



Robust Industry Support from Diverse Stakeholders

Mitigation Strategies





RWANDA GBS/BPO & DIGITAL VALUE PROPOSITION

EXTENDED VERSION

