



▶ LET'S GO AFRICA ◀

AFICTA's initiative to create 1 million jobs throughout Africa by 2020



Agenda

Africa at a glance

Potential African Destinations

Target Sectors

Existing Market Players

Business Development Strategy

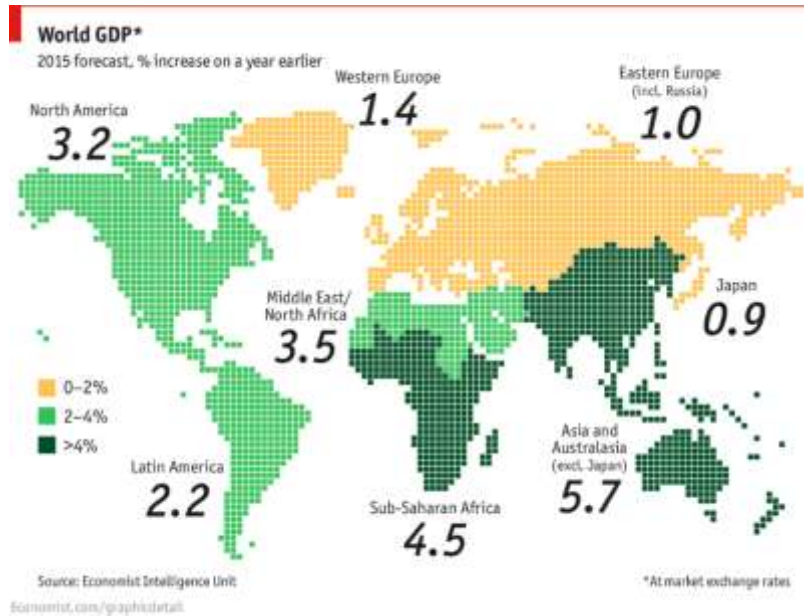
Africa at a glance...



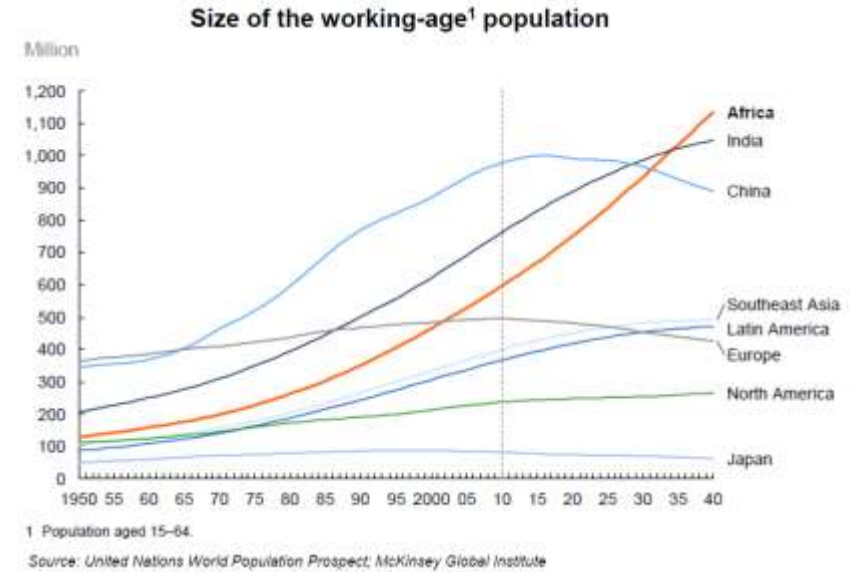
- **4 times** bigger than the US and **1.5 times** than Europe (1.2 billion inhabitants)
- **3 times** larger than the US and Europe (11.7 million square meters)
- Makes up **15%** of the World's population and origin to **25%** of the languages in **54** countries
- Has more people aged under 20 than anywhere in the world and the continent's population is set to double to **two billion** by 2050 and **quadruple** by 2100.
- Has the **longest river** in the world, the Nile (4,132 miles)
- Covers **6 time zones** (UTC-1 to UTC+4)
- Welcomes **50 million** tourists per year

A new Asia in the making...

Africa is one of the fastest growing regions Worldwide with the strongest outlook



Africa's workforce will become the world's largest by 2040



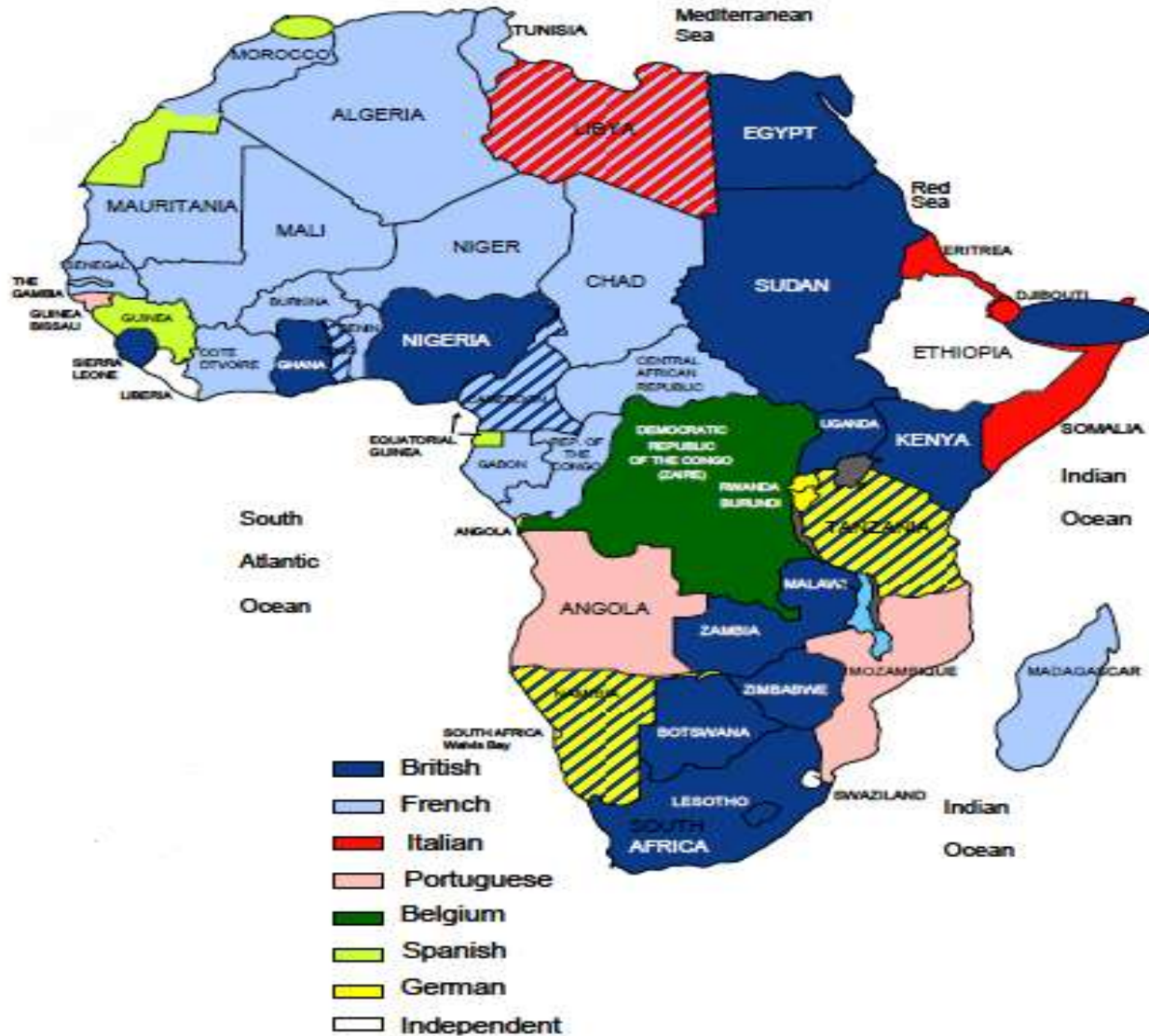
Africa ranked by International consultancy firm EY as the 2nd most attractive investment destination in the World

Africa's relative attractiveness is on the rise

Relative to the following markets, is Africa more or less attractive as an investment destination?



High multilingual potential...



210 million English speakers



100 million French-speakers



20 million speaking other languages



- Large diversity in languages & cultures
- Well educated talent with cultural affinity
- High scalability with over 300 million multilingual individuals
- Clear accent and language flow

Strong assets with immense opportunities...

Strengths

- One of the fastest growing continents in the World
- Strongest attractiveness level in the last 5 years with growing direct investments from large international companies
- Most youthful continent in the World
- Large cities with native language speakers
- Attractive labor markets with untapped resources
- Infrastructure and telecom speedy development
- Competitive cost

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Weaknesses

- Infrastructure and transport backwardness versus Europe and the US
- Telecom costs still high vs countries with more standardized and larger BPO markets (scale effect)
- Modest experience in BPO programs (vs titan BPO destinations like India and Philippines)

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Opportunities

- Alternative locations to traditional BPO offshore platforms in India/Philippines to mitigate business risk
- Potential of hosting multi-lingual platforms for international customers
- Development of innovative and responsible BPO initiatives targeting vulnerable populations (impact sourcing)
- Opportunity to offer specialized services in sharp skill demanding sectors (financial services)

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Threats

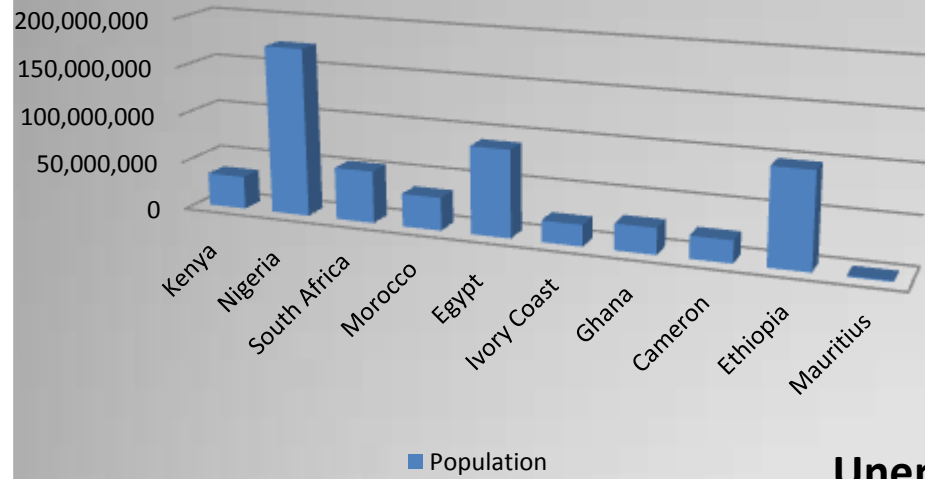
- Bad perception through major stereotypes
- Risk of union rising and constraining labor regulations
- Cost of living rising due to inflation
- Emergence of other low cost offshore destinations in southeast Asia

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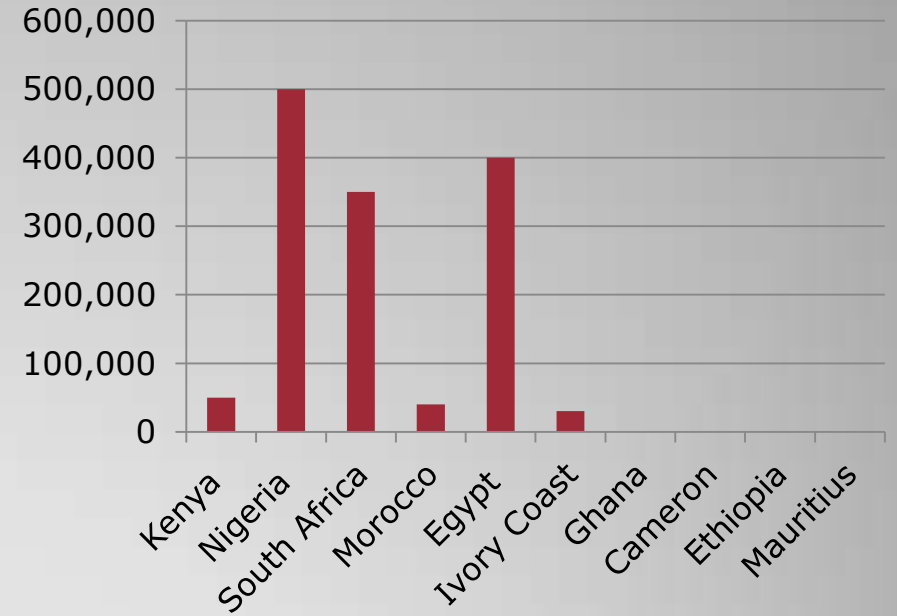
Potential Destinations...

Country	Population	The number of graduates	Unemployment rate	Language
Kenya	34,000,000	50,000	40%	English
Nigeria	174,000,000	500,000	13,3%	English
South Africa	54,000,000	350,000	26,6%	English
Morocco	34,000,000	40,000	8,6%	Arabic & French
Egypt	90,000,000	400,000	12,5%	Arabic & English
Ivory Coast	22,000,000	30,000	5,3%	French
Ghana	27,000,000		2,2%	English
Cameroon	23,000,000		4%	French
Namibia	2,000,000	5000	22%	German
Ethiopia	98,000,000		16,8%	
Mauritius	1,300,000		7,6%	English / French

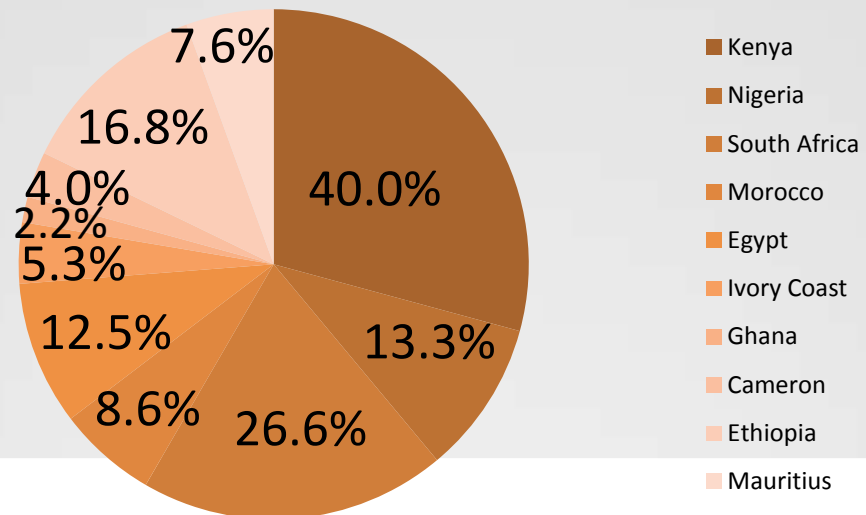
Population



Number of Graduates



Unemployment rate



Mobile Operators companies in Africa

Egypt had 96.89 million mobile users as of July 2013, government figures showed.^[50]
The telecom regulator in Egypt is [National Telecom Regulatory Authority](#) (NTRA).

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job Opportunities
1	Vodafone	39.7 ^[51] (Sep 2014)	Vodafone (54.9%), Telecom Egypt (44.70%), Free Float (0.20%)	2502
2	Orange	33.5 ^[50] (July 2013)	Orange S.A. (98.92%), Free Float (1.08%)	2110
3	Etisalat	22.4 ^[50] (July 2013)	Etisalat (76%), Egypt Post (20%), Other Investors (4%)	1411
Total Estimate Job Opportunities				6,023

Mobile Operators companies in Africa

Ivory Coast In September 2010 the penetration rate was estimated at 68.5% over a population estimate of 21.5 million.^[35]
 The telecom regulator in Côte d'Ivoire is [Autorité de Régulation des Télécommunications/TIC de Côte d'Ivoire](#) (ARTCI).

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job Opportunities
1	MTN	7.723 (Sep 2014) ^[36]	MTN (64.7%), Planor (25.3%), Teylium group (10%)	487
2	Orange	3.817 (Dec 2009) ^[27]	Orange S.A. (85%), Comafrique (15%)	240
3	Moov	2.538 (Q1 2010) ^[22]	Etisalat (100%)	160
-	Koz	2.500 (April 2010) ^[37]	Comium (licence revoked) ^[38]	157
-	GreenN	0.617 (Q1 2010) ^[citation needed]	LAP Oricel (licence revoked) ^[38]	39
-	Warid	Not Yet Available	Warid Telecom (licence revoked) ^[38]	
-	Mobile Cafe	Not Yet Available	Aircomm (licence revoked) ^[38]	
8	YooMee	Not Yet Available	YooMee	
Total Estimate Job Opportunities				1,083

Mobile Operators companies in Africa

Kenya has 31.1 million subscribers in total, or a 76.9% penetration rate.^[73] (September 2013)

The telecom regulator in Kenya is [Communications Authority of Kenya](#) (CA).

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job Opportunities
1	Safaricom	20.8 ^[73] (Sep 2013)	Vodafone (40%) Public Float (60%)	1310
2	Airtel (formerly Zain)	5.5 ^[73] (Sep 2013)	Bharti Airtel (80%)	346
3	Telkom Kenya (formerly Orange)	2.2 ^[73] (Sep 2013)	Helios Investment Partners (70%) ^[74] Kenyan government (30%)	139
Total Estimate Job Opportunities				1,795

Mobile Operators companies in Africa

MOROCCO has 31.311 million subscribers in total, or a 113.57% penetration rate.^[96] (December 2011)
The telecom regulator in Morocco is [Agence Nationale de Réglementation des Telecommunications](#) (ANRT).

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job opportunities
1	IAM	17.126 (dec 2011)	Etisalat (53%), state of Morocco (30%)	1079
2	Méditel	12.035 (dec 2011)	Orange S.A. (49%), FinanceCom+CDG (51%)	758
3	Inwi	7.393 (dec 2011)	Zain Group (31%)	466
Total Estimate Job Opportunities				2,303

Mobile Operators companies in Africa

Nigeria In September 2013 the penetration rate was estimated at 70% over a population estimate of 168.8 million.^[104]
The telecom regulator in Nigeria is [Nigerian Communications Commission](#) (NCC).

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job Opportunities
1	MTN	62.5 ^[105] (Sept 2015)	MTN (41.5%)	3937
2	Airtel (formerly Zain)	31.1 ^[105] (Sept 2015)	Bharti Airtel (20.6%)	1959
3	Glo Mobile	31.3 ^[105] (Sept 2015)	Globacom (20.78%)	1959
4	Etisalat	23.5 ^[105] (Sept 2015)	Etisalat , Mubadala , Nigerian Investors (15.60%)	1480
5	Visafone	2.03 ^[105] (Sept 2015)	Visafone (0.014%)	128
6	Multilinks Telkom	0.01 ^[105] (Sept 2015)	Telkom	
Total Estimate Job Opportunities				9,463

Mobile Operators companies in Africa

South Africa In September 2010 the penetration rate was estimated at 99.6% over a population estimate of 49 million.^[130]
The telecom regulator in South Africa is [Independent Communications Authority of South Africa](#) (ICASA).

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job Opportunities
1	Vodacom	31.520 ^[39] (Mar 2014)	Vodafone (65%)	1985
2	MTN	21.224 ^[36] (Sep 2014)	MTN Group	1337
3	Cell C	6.9 ^[131] (June 2009)	Oger Telecom in process of diluting it's 70% stake to 27% Blue Label Telecoms is planning to acquire a 30% stake in Cell C ^[132]	435
4	Telkom	1.8 ^[133] (March 2014)	Telkom	113
Total Estimate Job Opportunities				3,870

Mobile Operators companies in Africa

Ghana In December 2015 the penetration rate was estimated at 127% over a population estimate of 25.4 million.^[58]
The telecom regulator in Ghana is [National Communication Authority](#) (NCA).

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job Opportunities
1	MTN	16.25 ^[58] (Dec 2015)	MTN (97.7%)	1024
2	Vodafone	7.61 ^[58] (Dec 2015)	Vodafone (70%)	479
3	Tigo	4.85 ^[58] (Dec 2015)	MIC (100%)	305
4	Airtel	4.79 ^[58] (Dec 2015)	Bharti Airtel (75%)	302
5	Glo	1.37 ^[58] (Dec 2015)	Globacom (100%)	86
6	Expresso Telecom	0.13 ^[58] (Dec 2015)	Sudatel (100%)	10
Total Estimate Job Opportunities				2,206

Mobile Operators companies in Africa

- **Cameroon** In July 2011 the penetration rate was estimated at 43% over a population estimate of 19.7 million.[23]

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job Opportunities
1	MTN	10.1 ^[24] (dec 2014)	MTN Group (70%)	636
2	Orange	6.2 ^[24] (dec 2014)	Orange S.A.	391
3	Nexttel	2.0 ^[24] (May 2015)	Viettel Global , Bestinver Cameroon S.A.R.L	126
4	Camtel	new licence in sept 2014	Camtel (government)	
5	YooMee	Not yet available	YooMee	
Total Estimate Job Opportunities				1,153

Mobile Operators companies in Africa

- **Ethiopia** In September 2010 the penetration rate was estimated at 4.6% over a population estimate of 90.8 million. ^[54]
- The telecom regulator in Ethiopia is [Ministry of Communication and Information Technology](#) (MCIT).

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job Opportunities
1	Ethiotelecom	26.2 ^[55]	Ethiopian Telecommunications Corporation	1651

Mobile Operators companies in Africa

- **Mauritius** The country has 0.78 million subscribers in total, or a 60% penetration rate.^[94] (September 2007)
- The telecom regulator in Mauritius is [Information and Communication Technologies Authority of Mauritius](#) (ICTA).

Rank	Operator	Subscribers (in millions)	Ownership	Estimate Job Opportunities
1	Orange	0.628 ^[27] (Dec 2009)	Mauritius Telecom group and Orange S.A.	40
2	Emtel	0.437 ^[95] (Dec 2009)	MIC (50%), Currimjee	28
3	MTML	0.2 ^[citation needed] (March 2008)	Mahanagar Telephone Mauritius Limited (MTML)	13
Total Estimate Job Opportunities				81

**Total Estimate Job Opportunities in African Countries
for the Mobile Sector**

29,628

Existing Market Players...

Call Centers in Nigeria

1. CNSSL Contact Centre Limited (CNSSCC)
2. Contact Solutions Limited.
3. Tech Mahindra.
4. Spanco Channel BPO.
5. Huawei BPO Solution.
6. Alliance InfoTech (P) Ltd.
7. RapidBTS Telecoms.
8. Global Site Concept Resources.
9. iCamlight Solutions Limited.
10. LeTenor Technologies Limited.
11. Pinakle Computer Technologies.
12. Coretech Products and Services.
13. Mtn Office.

Call Center in Kenya

1. New Age Telecommunication Limited.
2. German Laptops.
3. Dynamic Systems.
4. Syntax Communications.
5. Meru Homes Ltd.
6. Computer Revolution.
7. Maasai Computer Training Center.
8. Kencall EPZ Ltd.
9. Horizon Contact Center.
10. Call Centre Africa EPZ Ltd.

Call Centers in South Africa

1. Emporium Management Services.
2. All Four Services CC.
3. Amandla Omoya Holdings (Pty) Ltd.
4. Amazing Voice Cc.
5. Blusqare Online.
6. Brandbox Media (Pty) Ltd:Morningside.
7. Ccs-Africa Telecom Cc.
8. CNS Call Centre (Pty) Ltd.
9. Customer Feedback Systems – South Africa (Pty) Ltd.
10. Cv Smith Property Holdings Cc.
11. Damascrus Marketing CC.
12. Darrrt Call Centre Solutions.
13. Darrian Naidoo Contact Centers CC.
14. Emergency Call Centre.
15. Essential Mobile Sollutions (Pty) Ltd.
1. Fossil Call Centre.
2. Globex Direct (Pty) Ltd.
3. 2help1 Direct (Pty) Ltd.
4. Huntrex 136 (Pty) Ltd.
5. Inovo Telecom (Pty) Ltd.
6. Khwani Trading Cc.
7. Luksha Trading (Pty)Ltd.
8. Mango 5 Call Centre Pty Ltd.
9. Masakhane Call Centre Cc.
10. MDMT Marketing & Trading.
11. National Voip Switching Centre.
12. Only Call Cc.
13. Oupa Teke Trading Enterprise CC.
14. Quicktender.
15. Sanlam Call Centre.

Call Centers in Cameron

1. Custom Telephone Systems Inc
2. Folker Communications Limited
3. Al-anon.
4. Prime Communications
5. At&t Store
6. Windstream Communications
7. Texas Communications
8. Bryan 800 Communications Inc

Call Center in Morocco

1. Phone Group
2. Xceed
3. Acticall

Call Centers in Ghana

1. Hardric Engineering Ltd.
2. Dannywarren Ltd.
3. Xpert Computers.
4. ALBECOF.
5. Electrical & Infotech Solutions.
6. FREQ Multi Network.

Call Center in Mauritius

1. Accenture Services (Mauritius) Ltd.
2. CSL BPO Services.
3. Techmode Outsourcing Ltd.
4. Apollo Solutions Ltd.
5. Euro CRM Mauritius Ltd.

Call Centers in Ivory Coast

1. Arvato
2. Yogam Bpo

Offshore Outsourcing

- **United States of America:**
 - Outsources 14 million Job
 - Outsources to different Countries:
 - China & India in the technology Sector
 - India & Philippines in the Call Center Industry
 - Mexico in the Auto Manufacturing Industry

Offshore Destination – case study

- **Philippines:**

- A chosen destination for BPO industry as they have English speakers with good American accent.
- Experts estimate that the BPO industry will generate \$ 25 Billion
- 1,000 BPO Operator existing.
- 1,000,000 jobs are already currently present in Philipines

Ivory Coast & Senegal operations

Ivory Coast



Key Facts & Service Portfolio

- **Founded:** 2014
- **City/Cities:** Abidjan
- **Employees:** 139 / **Seats:** 200 in 1 site (500 seats expansion capacity)
- **Languages:** French & English
- **Services (B2C):**
 - Customer Care (inbound calls, emails)
 - Commercial support (inbound calls, emails)
 - Back Office
- **Main industries serviced:** e-commerce, telecom

Key Facts & Service Portfolio

- **Founded:** 2013
- **City/Cities:** Dakar
- **Employees:** 314 / **Seats:** 370 in 1 site (500 seats expansion capacity)
- **Languages:** French & English
- **Services (B2C):**
 - Customer Care (inbound calls, emails, live chat)
 - Commercial support (inbound calls, emails, live chat)
 - Inbound selling (inbound calls)
- **Main industries serviced:** e-commerce, media

Senegal



Site



Site





“GO” Africa : GLOBAL OUTSOURCING Africa

Is now officially the name of AFICTA’s program for the creation of 1 Million jobs throughout Africa in the offshoring of BPO, KPO and ITO to Africa

Jobs Created in Africa Annually would be as follows:

Total Estimate Job Opportunities Offshore Outsourcing	1,000,000
2017	200,000
2018	400,000
2019	800,000
2020	1,000,000

Budget

- Creating a job costs: \$100
 - Selection
 - Recruitment
 - Training
- To create 1,000,000 jobs need: \$100,000,000

Business Plan

- Forming a committee to own the project with a clear objective of promoting Africa as an outsourcing destination
- Hiring a project manager with full time responsibility and operates with all stakeholders
- Meeting with NGO bodies and associations that promote and develop the BPO business throughout Africa similar to Eitesal Egypt and/or organizations supporting call centers in African countries to boost the industry in the region.
- Meeting with all African Ministries of ICT who are part of this initiative
- Promote Africa as an outsourcing destination
- Participate in the Call Center International summits e.g. IAOP representing African Countries
- Participate in the Mobile World Congress representing African Countries
- Fundraising to support the project

Capacity Building

- Agreements with Universities to support the call centers with their needed calibers
- Participate in the Universities employment fairs
- Hosting events in Universities to promote the call center field and the career path for the agents
- Certifying call centers with internationally recognized certificate like COPC and ISO

Funding the project

- International Donor agencies to be invited to a summit for the program
- Contact the Social & Development Bank in Europe to support in building call centers.
- USAID
- Rokefeller foundation initiative to create jobs in Africa

Thank You