

**G:ENESIS**



*harambee*  
YOUTH EMPLOYMENT ACCELERATOR



**RWANDA GLOBAL  
BUSINESS SERVICES  
CASE STUDY & SPECIAL  
COUNTRY REPORT**

# TABLE OF CONTENTS

## Rwanda Global Business Services Case Study & Special Country Report

Introduction	3
Key Highlights	4
Rwanda's GBS/BPO Sector Creation	7
Country Snapshot	8
The Business Case	10
Talent and Skills	11
Average and Experience Level Salaries	13
Available GBS/BPO Capabilities	15
Key Operator Profiles	16
Enabling Environment	19
Transport Infrastructure	24
Air Transport Infrastructure	24
Transport for Agents	24
Immigration and Visas	25
ICT and Connectivity	27
Electricity Reliability	29
Kigali Innovation City	30
Conclusion	31
Annexure	32

# INTRODUCTION

**Murakaza neza! Welcome! This is the traditional, warm reception you would receive as an investor or visitor to Rwanda.**

Attracted by the country's economic and political stability, strong education system, harmonious talent and commitment to progressive reform, multinational corporations are quickly establishing operations in Rwanda. Nowhere is this more apparent than in the Global Business Services (GBS) sector, where Rwanda is emerging as a delivery location of excellence.

In fact, Rwanda is ranked 10th globally in the technical help desk support category of the 2022 GBS World Competitiveness Index - Digital and ITO. Rwanda's strategic direction towards digitization and creating a knowledge-based economy are salient factors leading to this recognition.

As such, its people have become a national asset and key determinants of GBS expansion through their growing technical business process capabilities – a talent pool that is largely untapped.

These contributions have positioned this small enclave in the heart of Africa as a rising GBS star and regional powerhouse.

# KEY HIGHLIGHTS



**4 MILLION**  
Youth Population (est.)



**US\$86.5 MILLION**  
2021 Domestic & International  
GBS/BPO Revenue



**62 000**  
Total B2 English-speaking  
Addressable Talent Pool



**484 000**  
Total Addressable  
Talent Pool



**4 613**  
Domestic & International  
GBS/BPO Workforce



**1 700**  
\*Monthly Ramp-speeds for  
New B2 English Level Hires



**10TH**  
Global rank for the technical help  
desk support category in the 2022  
GBS World Competitiveness Index -  
Digital and ITO

## Key Business Case Drivers



**Bilingualism  
in English &  
French**



**Adaptability of Key  
Sector Players to  
Re-learn & Grow**



**GBS Market  
Earmarked as  
a Priority  
Sector**



**Oneness and  
Unity in the  
Workforce**



**Established as a  
Boutique Services  
Location**



**Enhanced investment  
incentives through  
Rwanda's New  
Investment Code**

# KEY HIGHLIGHTS

## Competitive Salaries



**US\$199**

Average Monthly Intermediate Level Contact Center Agent Salary



**US\$367**

Average Monthly Intermediate Level Helpdesk Agent Salary

## Key Established Operators



CCI Global



Tek Experts Rwanda



iSON Xperiences Rwanda



SolvIT



AdFinance



Deriv

## Key Sector Stakeholders



Rwanda Development Board (RDB)



Harambee Youth Employment Accelerator



Rwanda Information Society Authority (RISA)



Mastercard Foundation



Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)

## ICT Infrastructure



**1**

Undersea cable, SEACOM, Connected via Tanzania and Kenya



**29%**

Growth of Rwanda's ICT Sector in 2020, One of the **Fastest-growing ICT Sectors in Africa**



**700KM**

Rwanda's Fibre Optic Backbone

**30 MBPS**

Average Download Speed

**US\$45** PER MONTH

for 50 Mbps Average Fibre Internet Cost

**US\$0.12**

per min Average VoIP Cost

**KIGALI INNOVATION CITY**

Mixed use innovation city

Sources: Rwanda Mission of the Ministry of Infrastructure; Submarine Networks; MTN; Airtel; Liquid Home

## Transport Infrastructure

**12 000 KM**  
Road Network

**KIGALI INTERNATIONAL AIRPORT**

Serves Domestic, Regional & International Flights to **31** Destinations in **22** Countries

**US\$0.28**

- **US\$1.09**

Average transport Fees by Moto Taxi

**US\$0.27**

- **US\$0.57**

Average Transport Fees by Bus

**PUBLIC TRANSPORT REFORMS**

Have Vastly Improved Public Transport Reliability & Efficiency

**US\$0.57**

- **US\$2.14**

Average transport Fees by Bus Taxi

**RWANDA'S COST-COMPETITIVE, TALENTED AND EAGER-TO-LEARN WORKFORCE IS REFLECTED ACROSS ALL GBS/BPO OPERATORS' SUCCESS STORIES.**

**TEK EXPERTS:**

“I have always relied on my technical skills but realized I’d need to work on my communication skills to succeed in my career. The English program and technical training I’ve received have set me up for success. I’m excited to work with an international company and have the chance to interact with many people which is not typical in the IT field.”



**- Didier Nkundimana,  
Customer Success Manager**

**TEK EXPERTS:**

“Performance has been the main factor behind Tek Experts growth in Rwanda. Each of our Engineers is committed to driving their own performance through continually learning, seeking feedback and growing personally. Through elev8 (our sister company dedicated to digital training and learning) Tek Experts Rwanda has the ability to invest and grow the skills and bridge talent gaps. This way, we retain our Engineers, supporting them to develop and grow to the next level of complexity, boosting performance and personal achievement in the process.”

**- Gary Bennett, Country Manager for Tek  
Experts Rwanda**



# RWANDA'S GBS/BPO SECTOR CREATION

EST. MARKET VALUE:  
US\$29 MILLION  
EST. WORKFORCE:  
1 545



ISON XPERIENCES OPENS A DELIVERY SITE IN RWANDA



RWANDAN GOVERNMENT TURNS TO GBS/BPO SECTOR TO REDUCE UNEMPLOYMENT, WHEREBY THE STRATEGIC IMPORTANCE AND URGENCY LEVELS TO DEVELOP THE SECTOR WERE MARKED AS 'HIGH'



EST. MARKET VALUE: US\$62 MILLION  
EST. WORKFORCE:  
3 284

SOLVIT IS ESTABLISHED



IMPLEMENTATION OF THE ICT SECTOR STRATEGIC PLAN



DERIV OPENS AN OFFICE IN KIGALI TO SUPPORT THEIR AFRICAN CLIENTS



3 NEW INTERNATIONAL OPERATORS OPEN SITES IN RWANDA: TEK EXPERTS, TECHAFFINITY & AMALITECH ESTABLISH SITES IN RWANDA



EST. ANNUAL MARKET REVENUE:  
US\$86.5 MILLION  
EST. WORKFORCE:  
4 613



CCI GLOBAL ENTERS THE MARKET

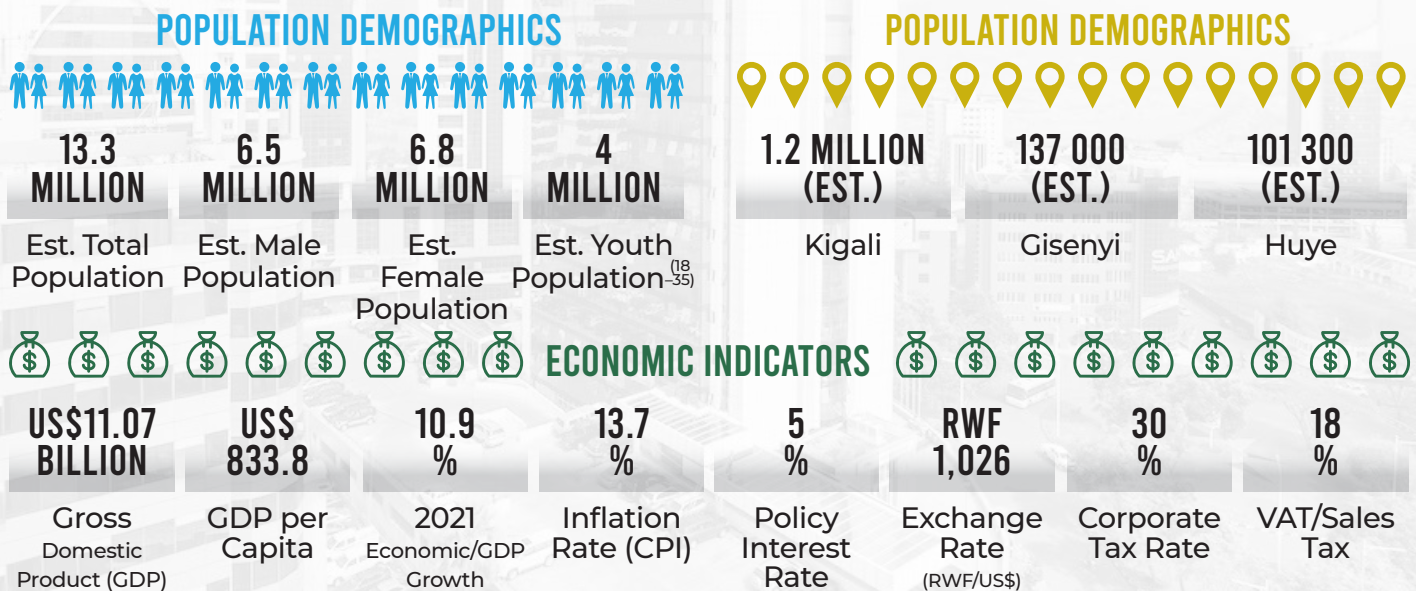
# COUNTRY SNAPSHOT

Rwanda is a small, landlocked country in the East Africa region with a population of over 13 million people. The country borders the Democratic Republic of Congo, Tanzania, Uganda and Burundi. Due to vital economic and structural reforms, as well as guarding political stability, Rwanda has made incredible strides in economic growth over the last two decades.

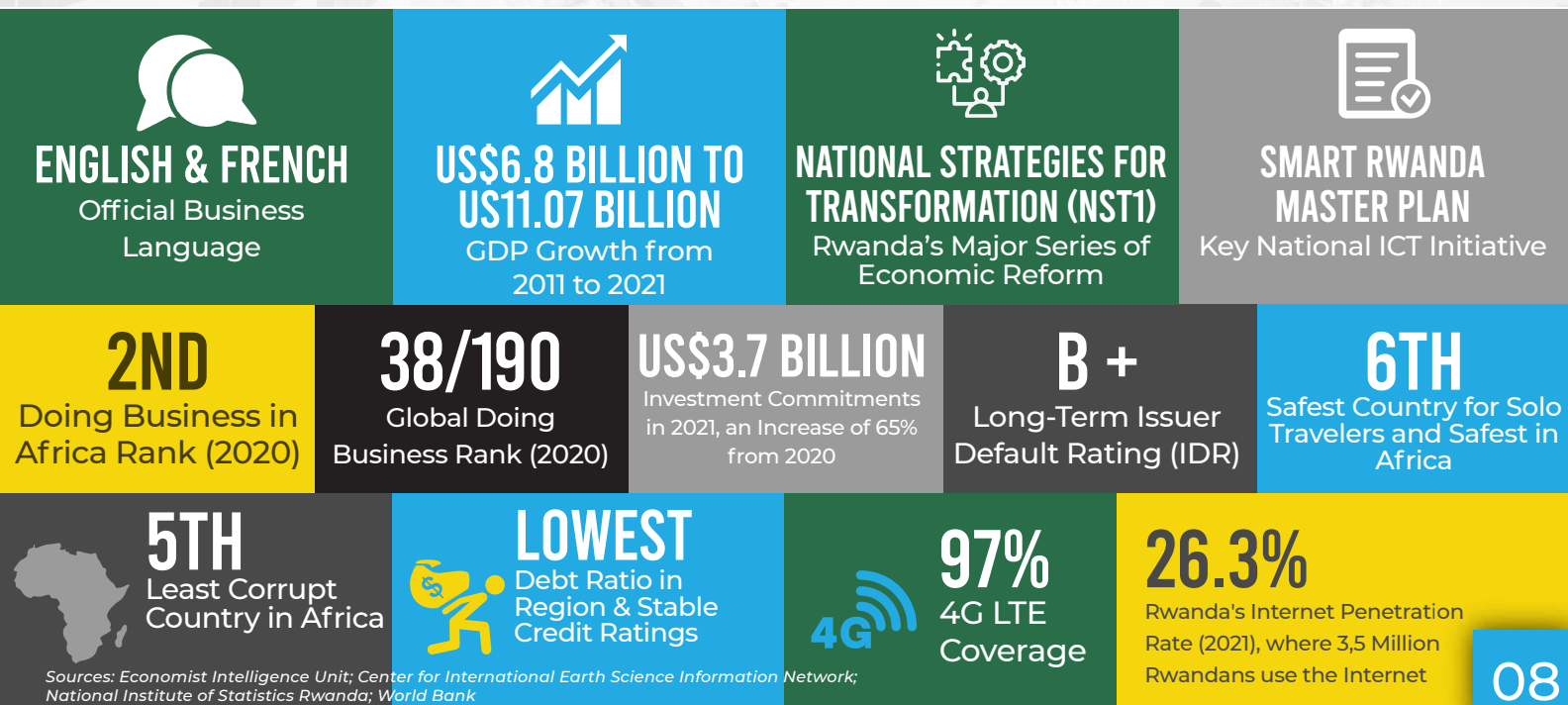
## Rwanda at a Glance

<b>13.3 MILLION</b>	<b>KIGALI</b>	<b>ENGLISH, FRENCH, KINYARWANDA AND SWAHILI</b>	<b>RWANDAN FRANC (RWF)</b>	<b>6.34% AVERAGE</b>	<b>GMT + 2</b>	<b>2.5%</b>
Total Population	Capital City	Major Languages	National Currency	Economic Growth <small>(2011-2021)</small>	Time Zone	Population Growth

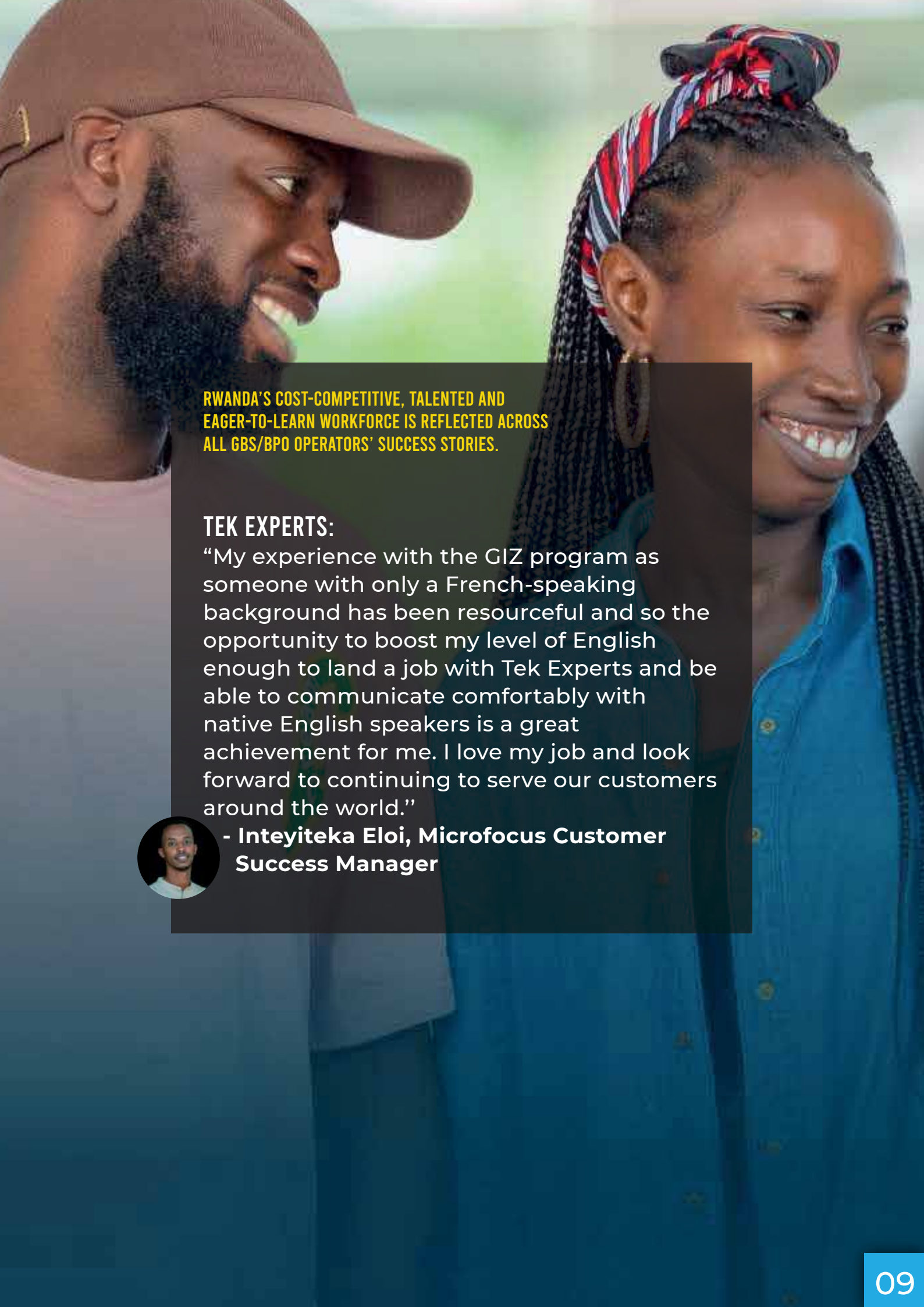
## Granular Country Data



## Business & Investment Data







**RWANDA'S COST-COMPETITIVE, TALENTED AND EAGER-TO-LEARN WORKFORCE IS REFLECTED ACROSS ALL GBS/BPO OPERATORS' SUCCESS STORIES.**

**TEK EXPERTS:**

“My experience with the GIZ program as someone with only a French-speaking background has been resourceful and so the opportunity to boost my level of English enough to land a job with Tek Experts and be able to communicate comfortably with native English speakers is a great achievement for me. I love my job and look forward to continuing to serve our customers around the world.”



**- Inteyiteka Eloi, Microfocus Customer Success Manager**

# THE BUSINESS CASE

**With many of its citizens possessing excellent bilingual skills in English and French, Rwanda's talent has the ability to service Anglophone and, if nurtured, some Francophone markets.** Rwanda has over 1 million fluent English-speakers, 750,000 fluent French-speakers and 400,000 that are bilingual in English/French. As such, Rwanda is uniquely placed to service a broad array of global source markets, presenting the country as an attractive GBS/BPO location for global buyers and operators.

**The flexibility, adaptability and willingness of key sector players to learn, grow, re-learn and continue to scale (reflective in both public and private sector operators) is a favorable factor in fostering sustainable growth in Rwanda's GBS/BPO sector.** A synthesized, cooperative sector ecosystem between public and private stakeholders enable a free-flowing feedback loop highlighting best practices, potential constraints, solutions and opportunities. Consequently, a healthy learning environment for GBS/BPO development is sustained creating maneuverability for continued growth.

**The sector has been earmarked by government as a priority sector and the Rwanda Development Board (RDB) is an active government GBS/BPO champion.** RDB has taken a coordinated approach in developing the country's GBS/BPO sector by consulting and working closely with development agencies (the Deutsche Gesellschaft für Internationale Zusammenarbeit or GIZ), youth employment accelerators and work readiness drivers (Harambee) and private GBS/BPO operators. This stakeholder ecosystem, lead by RDB, sets out the roles of each industry stakeholder, identifying opportunity gaps and developing and implementing solutions to fast-track the sector's growth trajectory.

**Directions taken by key stakeholders resonate throughout Rwanda's unified nation, which permeates to the workforce - when they move, they all move together in one direction.** Unity in Rwanda's workforce enables a receptiveness that allows sector stakeholders to steer the GBS/BPO sector in a specific direction with relative ease. Additionally, a harmonious unison between Rwanda's operators and workforce, as well as other sector stakeholders, instills a culture of cooperation. For instance, 90.8% of Rwandans are vaccinated for COVID-19, one of the highest vaccination rates globally. In this way, GBS/BPO industry objectives and growth gains can be achieved at a faster pace and more efficiently, achieving sector goals.

**Rwanda is quickly establishing itself as a boutique services location catering for medium and mid-sized CX/contact center and tech support BPO/ITO operators.** To incentivize GBS/BPO investors to build CX/contact center sites from the ground-up and to retain those investments, Rwanda has focused on attracting regional and global medium-to-midsized BPO and ITO operators. Special incentives have been key in attracting these service providers, such as the reduction in Corporate Income Taxes (CIT). This has enabled Rwanda to create jobs in the sector while concurrently providing investment "stickability".

**In addition, Rwanda has implemented the "New Investment Code", which introduces a new set of investment incentives applicable to key priority sectors, including ICT and BPO.** These incentives also apply to skills development initiatives, which can be funded by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ). To ensure these incentives are optimized, the RDB provide investment facilitation services to prospective investors.

# TALENT AND SKILLS

## Inside Rwanda's well-functioning GBS/BPO ecosystem is a largely untapped talent pool.

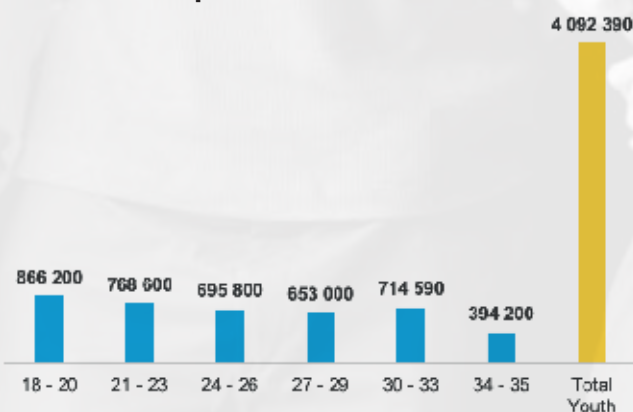
With an average age of 20 years and where 70% of the population is under the age of 30, Rwanda has a significant youth population that can be leveraged for GBS/BPO scalability.

To understand how much of Rwanda's youth can service international GBS/BPO English-speaking source markets, it is required to calculate the country's total addressable talent pool that have at least a B2 level of English-speaking capability.

The youth population, unemployed and underemployed youth, qualification holders, current GBS/BPO workforce growth and B2 English-speaking capabilities are key variables to find this "magic number".

Currently, there are a total of 4 million youth between the ages of 18 and 35, the majority of which are in the 18-20 age bracket.

## Est. Youth Population:



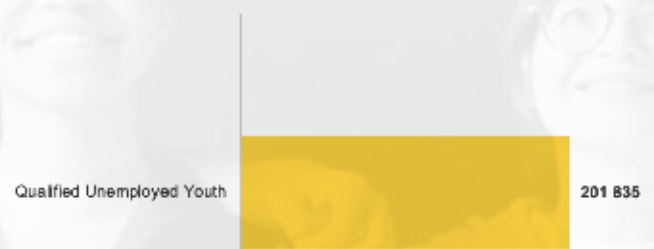
Sources: World Population Review; Worldometers.info



## Est. Qualified Unemployed Youth:

Although Rwanda has made progressive gains in its socio-economic trajectory, the youth unemployment rate is a significant 21%, on average, across the country. Today, there are over 731,000 youth that are in the labor force, but yet to find employment.

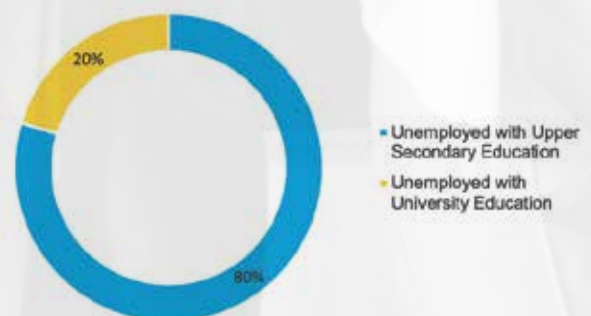
Of those unemployed youth, over 201,000 have an upper secondary (high school), TVET, teaching diploma or a university qualification, making them eligible for GBS/BPO hire.



Source: National Institute of Statistics Rwanda 2021 Labour Force Survey

Around 22% of unemployed youth have an upper secondary or high school qualification, while 5.6% have a university degree. In total, 27.6% of unemployed youth with a qualification have the level of education required for GBS/BPO hire.

## Qualified Unemployed Youth by Education:



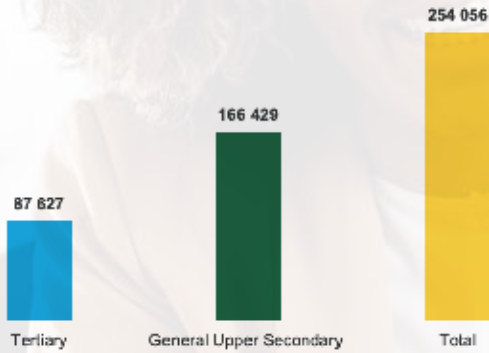
Source: National Institute of Statistics Rwanda 2021 Labour Force Survey

# TALENT AND SKILLS

Moreover, there are over 315 000 underemployed youth in Rwanda. These are youth that are part of the labour force that are not working a full day and are available to work additional hours given an opportunity for more work.

Of the 315 000 underemployed youth, 27.8% or 87 627 have a tertiary qualification and 53% or 166 429 have attained a general upper secondary education. In total, there are over 254 000 underemployed youth that are eligible for GBS/BPO hire.

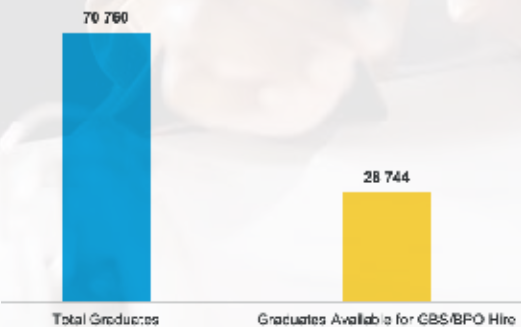
## Est. Qualified Underemployed Youth:



Sources: National Institute of Statistics Rwanda 2021 Labour Force Survey; Genesis GBS

Each year, over 70 000 Rwandan youth qualify with either an upper secondary or university degree. Over 28 000 of these graduates cannot find employment after graduating and therefore could avail themselves for GBS/BPO hire.

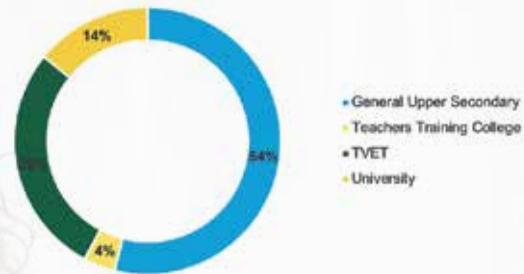
## Est. Number University & Upper Secondary Graduates Available for GBS/BPO Hire:



Source: Rwanda Ministry of Education 2020/2021 Education Statistical Yearbook

Most of these graduates have a general upper secondary qualification (54%), followed by TVET (28%), university (14%) and teachers training college (4%) qualifications.

## Breakdown of Graduates by Qualification Type:



Source: Rwanda Ministry of Education 2020/2021 Education Statistical Yearbook

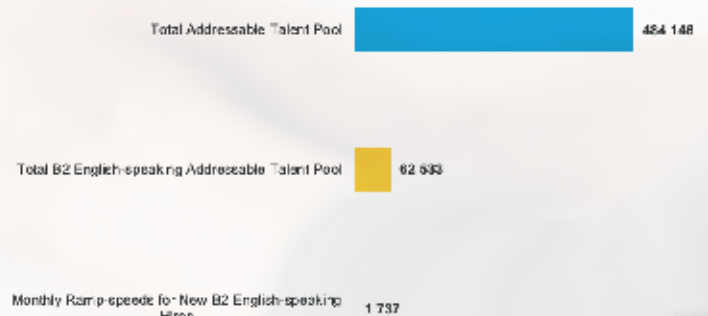
The growth in GBS/BPO full-time employees (FTEs) must be factored in when calculating the total B2 English-speaking addressable talent pool. As of 2021, there are over 4 613 FTEs employed in Rwanda's domestic and international GBS/BPO sector.

Factoring the numbers of qualified unemployed youth, underemployed youth, unemployed graduates and GBS/BPO FTE growth, Rwanda's total addressable talent pool is 484 146.

Over 62 000 of these candidates are considered to possess a B2 level and higher English-speaking capability, suitable to communicate to international English-speaking customers fluently. However, many of these candidates may still require work readiness training and elocution coaching.

Each month, existing and new GBS/BPO operators can hire up to 1 700 candidates without depleting the talent pool.

## Est. Total Addressable B2 English-speaking Talent Pool



Source: Genesis GBS

# AVERAGE AND EXPERIENCE LEVEL SALARIES

The attractiveness of Rwanda's deep GBS talent pool is heightened by the competitive salary costs for contact center and ITO roles.

RWANDA CALL CENTER SALARIES (EST.)	ENTRY LEVEL	INTERMEDIATE LEVEL	SENIOR LEVEL
CALL CENTER AGENT	103 000 RWF   \$99 PM	208 000 RWF   \$199 PM	418 000 RWF   \$369 PM
CALL CENTER TEAM LEADER/SUPERVISOR	188 000 RWF   \$180 PM	409 016 RWF   \$392 PM	418 000 RWF   \$623 PM
CALL CENTER MANAGER	388 958 RWF   \$373 PM	845 53 RWF   \$810 PM	1 339 983 RWF   \$1,284 PM



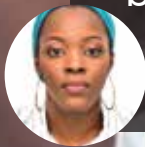
RWANDA ITO SALARIES (EST.)	ENTRY LEVEL	INTERMEDIATE LEVEL	SENIOR LEVEL
HELPDESK AGENT	197 000 RWF   \$189 PM	383 000 RWF   \$367 PM	453 000 RWF   \$434 PM
SOFTWARE DEVELOPER	309 000 RWF   \$299 PM	528 000 RWF   \$506 PM	936 000 RWF   \$897 PM



**RWANDA'S COST-COMPETITIVE, TALENTED AND EAGER-TO-LEARN WORKFORCE IS REFLECTED ACROSS ALL GBS/BPO OPERATORS' SUCCESS STORIES.**

**TEK EXPERTS:**

“My experience with the GIZ program was amazing, I love that I have been given such opportunity as a person with disability. With Tek Experts and Elev8, I have been able to improve my technical & soft skills on daily basis.”



**- Fatuma Zahra Rujugiro, Technical Support Engineer**

**CCI GLOBAL:**

“Africa is the new frontier in Global Business Services (GBS) and Rwanda is emerging as a regional leader, due to their talented and willing-to-learn workforce. Combined with their warmth, nothing but quality outcomes are achieved – something that is strongly resonating through the international GBS market.”



**- Martin Roe, Group Chief Executive Officer, CCI Global**

# AVAILABLE GBS/BPO CAPABILITIES

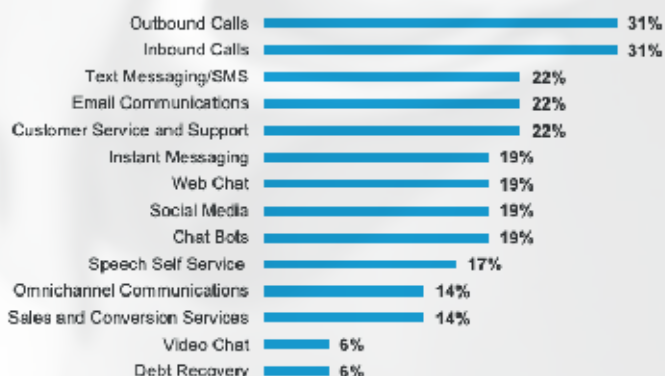
**The availability of English-proficient talent is driving Rwanda's budding GBS/BPO sector.** This is evident in the contact center and digital contact center CX, IT outsourcing and finance and accounting (F&A) horizontal services.

The following charts represent the granular GBS/BPO services delivered in Rwanda as a percentage of the total GBS/BPO services delivered by Rwandan operators.

Inbound and outbound calling constitute 31% of the portfolio of contact center services delivered by Rwanda's domestic and international GBS/BPO operators. Text messaging/SMS, email, instant messaging, social media and web chat make up 19% to 22% of digital contact channels serviced.

More complex contact center services, including debt recovery (6%), video chat (6%) and omnichannel communications (14%), are gradually emerging out of Rwanda to the domestic and international GBS/BPO markets.

## Rwanda Contact Center and Digital Contact Center CX Capabilities:



Rwanda's has a strong focus in ITO, with Technical Support (33%) and Software Development (30%) being the two dominant capabilities among the country's ITO operators.

Technical support has shown notable growth in Rwanda over the last three years, delivered by a third of GBS operators in the country.

The intra-regional expansion of Amalitech and the global expansion of Tek Experts are strong examples of Rwanda's burgeoning technical support capabilities.

## Rwanda ITO Capabilities:



Like ITO, F&A delivery is also growing in its range of expertise and prevalence, notably in tax and accounting management (25%). Internal auditing (19%) and F&A strategy (17%) are among the top three F&A capabilities delivered from Rwanda, primarily to the domestic market.

Due diligence (3%) and mergers and acquisitions (3%) are nascent, yet emerging F&A capabilities offered by Rwandan F&A providers.

## Rwanda Finance & Accounting (F&A) Capabilities:



# KEY OPERATOR PROFILES

## Tek Experts Rwanda

After their operations scaled successfully in Nigeria, Tek Experts formed a delivery site in Kigali, Rwanda in September 2021. Predominantly delivering technical support services to global tech clients, Tek Experts Rwanda initially hired 53 workers, which has rapidly swelled to 186 (October 2022).

Located in Kigali's business hub and emerging technology hotspot region, Tek Experts 2 500 sqm facility is connected to modern telecommunications and internet infrastructure, enabling seamless global delivery of technical support services.

The set up of the premises, sourcing of talent, the connection to ICT infrastructure, training and other establishment processes were successfully carried out within the constraints of the COVID-19 pandemic.

The country's high level of safety enable Tek Experts Rwanda to offer 24/7 support. Their "following-the-sun" model covers source market geographies at all times, ensuring solid business continuity for their clients.

Moreover, the digital skills training company, elev8, a YNV group subsidiary, has training facilities within the premises, where it delivers a range of onsite digital upskilling programs to Tek Expert Rwanda employees.

### A Tek Experts Rwanda Success Story:

#### Challenge:

- A global technology firm required the delivery of complex enterprise technology support to its customers in a short amount of time.

#### Solution:

- Tek Experts Rwanda sourced, onboarded, trained and deployed a team of tech support agents to deliver complex enterprise technology support.

#### Result:

- Within 6 months, the team exhibited exceptional performance in terms of technical competency and customer satisfaction scores.
- As such, the client doubled the allocation of business to Tek Experts Rwanda in the short space of 6 months.

## iSON Xperiences Rwanda

Established in 2013 and with a team of 220 agents, iSON Xperiences Rwanda primarily services the domestic telecoms Rwandan market. A wide range of contact center services are delivered to three leading African telecoms companies, mainly inbound customer service and outbound sales.

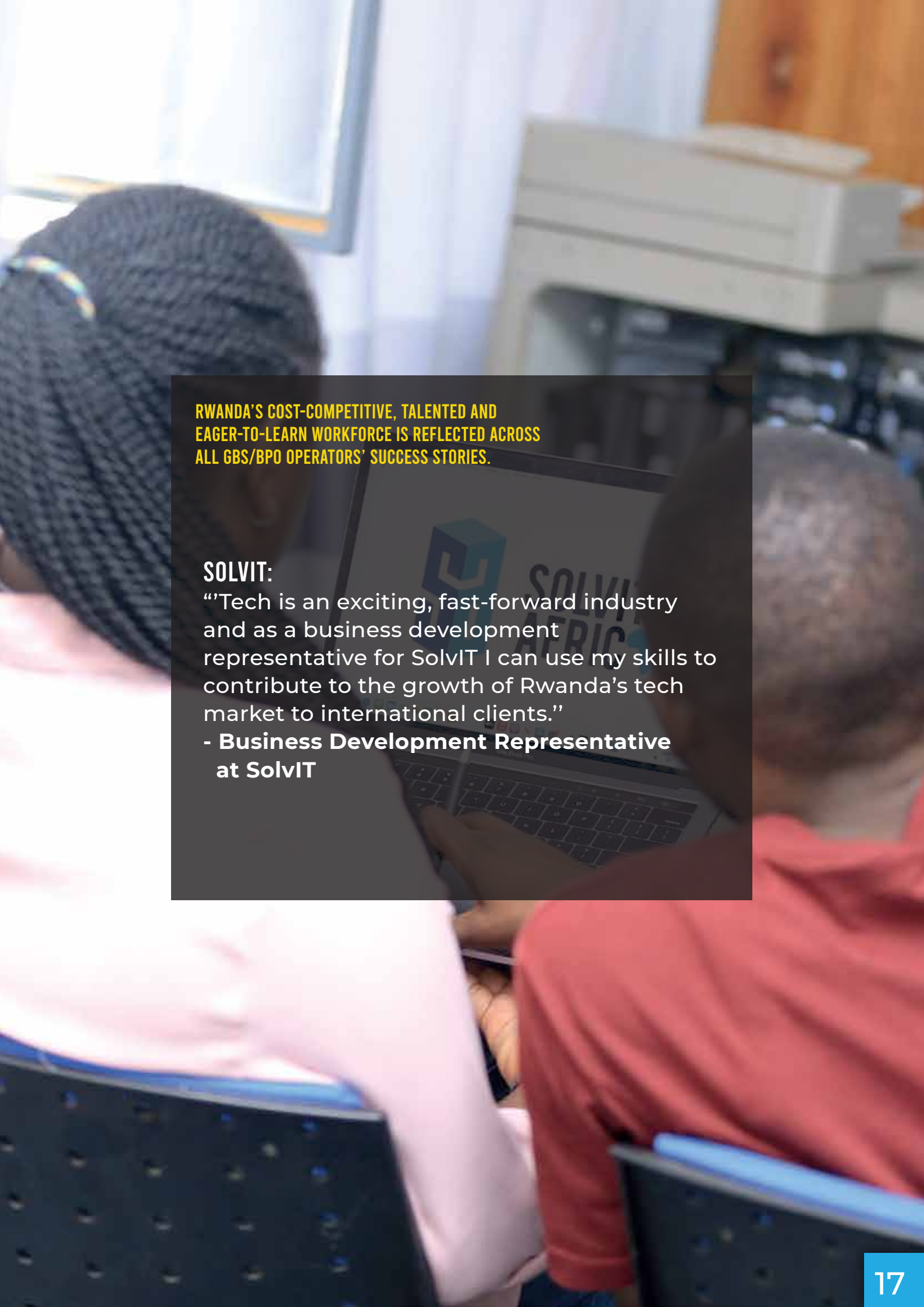
90% of agents deliver BPO services in Kinyarwanda, while the remaining 10% deliver to English and French speakers. However, iSON Xperiences Rwanda is looking to expand its reach beyond the borders of Rwanda to the US and European markets.

### An iSON Xperiences Rwanda Success Story:

MTN Rwanda transferred the management of its outsourced contact center to iSON Xperiences Rwanda in 2016. Competitive price points and evidenced delivery of exceptional CX to its current clients were some of the key push factors that led to MTN Rwanda allocating its contact center services to iSON Xperiences.







**RWANDA'S COST-COMPETITIVE, TALENTED AND EAGER-TO-LEARN WORKFORCE IS REFLECTED ACROSS ALL GBS/BPO OPERATORS' SUCCESS STORIES.**

**SOLVIT:**

“Tech is an exciting, fast-forward industry and as a business development representative for SolvIT I can use my skills to contribute to the growth of Rwanda’s tech market to international clients.”

**- Business Development Representative  
at SolvIT**

# KEY OPERATOR PROFILES

## SolvIT

Bringing together a network of tech talent, SolvIT provides talent sourcing services, specifically in software development, for IT and digital service providers looking to operate from Rwanda. To boost talent capabilities and competencies, SolvIT also offers a range of training, apprenticeship and intern opportunities.

One of the international clients SolvIT provides outsourced talent to is US-based software development firm, TechAffinity, that services major global brands.

SolvIT employs 35 workers with the potential to reach 100 over the next year.

### A SolvIT Success Story:

The company's founder, Joseph Semafara, a computer science graduate who could not find opportunities in the job market, established SolvIT as a computer hardware repair store. He then extended the business to provide computer repair training from individuals to schools. Training was extended to a range of more complex IT services, such as software development and coding.

The business then hired the people it trained and deployed them to local companies looking for IT and digital talent. SolvIT's client portfolio now crosses over the borders of Rwanda, servicing regional and international clients.

## AdFinance

With a presence in Rwanda, Burundi, Burkina Faso and Mauritius, AdFinance provides a range of needs-based finance software solutions and ITO/BPO services to microfinance institutions (MFIs). The company also offers a range of professional services, including core banking implementation, training and information system design.

The firm's multidisciplinary team is embedded with various competencies, including software development, banking, accounting, information systems and MFI practices.

More than half of AdFinance's team is situated in Rwanda, delivering software development, technical support and other support functions.

### An AdFinance Success Story

#### Challenge:

- Most Africans do not have access to basic financial and banking services.
- MFIs do not have the capacity to digitize their services and enable greater access to its customers.

#### Solution:

- AdFinance developed and deployed the Core Banking Solution product, an integrated Information System designed for MFIs.
- The AdFinance Mobile Banking Module was developed and deployed to MFI customers, enabling access to interact directly with the core banking system through their mobile phones.

#### Result:

- MFIs are able to provide digitalized financial services to their customers.
- A wider range of Africans now have access to financial and banking services they were previously excluded from through use of their mobile phones.



# ENABLING ENVIRONMENT

## Key government and sector stakeholder players and roles/profiles

### Rwanda Development Board (RDB)

Built on global expertise and modelled on international best practice, RDB is a government Investment Promotion Agency with the core mandate to attract, retain and facilitate investments into the national economy. RDB's role in Rwanda's GBS/BPO ecosystem includes:

- Promoting Rwanda's GBS/BPO value proposition to the international market.
- Facilitating GBS/BPO investments,
- Providing advisory services to buyers, investors and operators.
- Developing and leading skills development initiatives.
- One Stop Center investment services.

Visit RDB's website: [www.rdb.rw](http://www.rdb.rw)



### Rwanda Information Society Authority (RISA)

RISA, affiliated to the Ministry of ICT and Innovation, is a government institution mandated to plan and coordinate Rwanda's National ICT Development Agenda. A champion of Rwanda's digital transformation, RISA's overarching objective is to digitize the Rwandan economy and services. RISA's role in Rwanda's GBS/BPO ecosystem is to facilitate the conception and implementation of ICT policies that drive the development of ICT infrastructure - crucial in supporting the growth of GBS/BPO activity.

Visit the RISA's website: [www.risa.rw](http://www.risa.rw)



# ENABLING ENVIRONMENT

## Key government and sector stakeholder players and roles/profiles

### Harambee Youth Employment Accelerator

Harambee is a non-profit initiative that aims to tackle youth unemployment in Rwanda through customised solutions supported by data, innovation, partnerships and on-the-ground experience. As a key stakeholder in Rwanda's GBS/BPO ecosystem, Harambee is responsible for sharing insights into labor dynamics and providing youth unemployment solutions in Rwanda. Additionally, Harambee assists GBS/BPO organizations to source, train and deploy talent.

To achieve these objectives, Harambee partners with eight key public and private stakeholders:

1. Individual businesses
2. Government agencies
3. Local and international donors
4. Industry sector associations
5. Youth-serving organisations
6. Assessment specialists
7. Behaviour change experts
8. Technology providers
9. Education and Training Institutions (University of Rwanda, Kepler/Southern New Hampshire University, Akilah/Davis College and Mt. Kenya University)

Visit the Harambee website:  
[www.harambee.rw](http://www.harambee.rw)



### Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)

GIZ is a German development agency providing services in international cooperation for sustainable development and international education to developing economies. In Rwanda, GIZ focuses on three priority areas to grow and support Rwanda's GBS/BPO sector, including:

- Improving the quality and range of vocational training, as well as providing needs-based support to local businesses.
- Facilitating political decentralization and building an organized civil society.
- The provision of digital knowledge platforms and support mechanisms to central public institutions involved in ICT to develop Rwanda as a digital knowledge and service economy.

GIZ's Rwandan profile can be reached here:  
[www.giz.de/en/worldwide/332.html](http://www.giz.de/en/worldwide/332.html)



# ENABLING ENVIRONMENT

## Key government and sector stakeholder players and roles/profiles

### Mastercard Foundation

The Mastercard Foundation is a non-governmental organization with a focus on increasing financial inclusion and access to youth learning in Africa. Within Rwanda's ecosystem, the organization focuses on expanding access to quality education to build Rwanda's talent pipeline. As part of its holistic view of building skilled national workforces, the Mastercard Foundation has established the Centre for Innovative Teaching and Learning in ICT - a five-year initiative to grow the use of ICT in secondary education across African countries, including Rwanda.

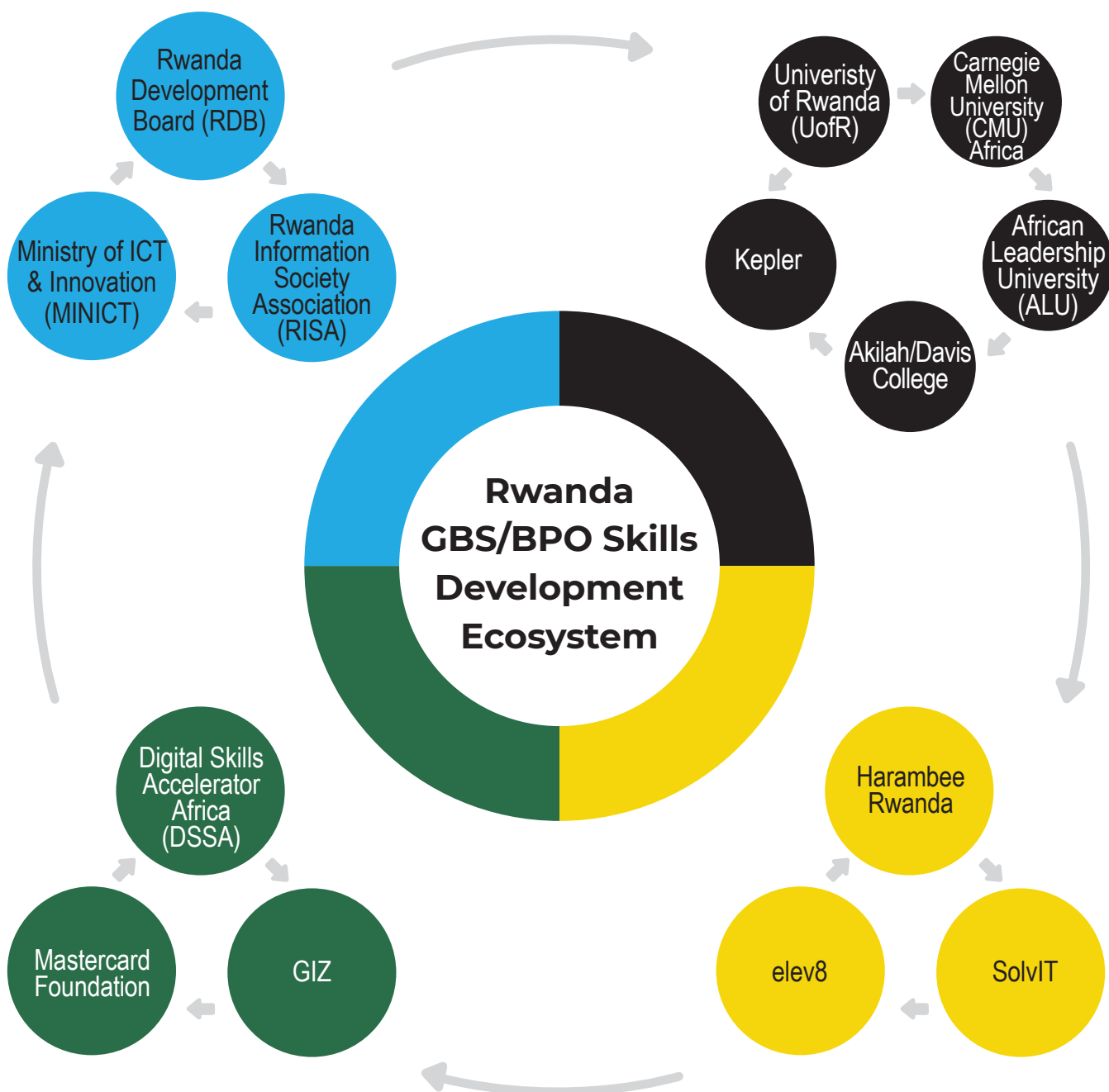
Mastercard Foundation's Rwanda landing page can be found here:  
<https://mastercardfdn.org/our-work/where-we-work-in-africa/rwanda/>

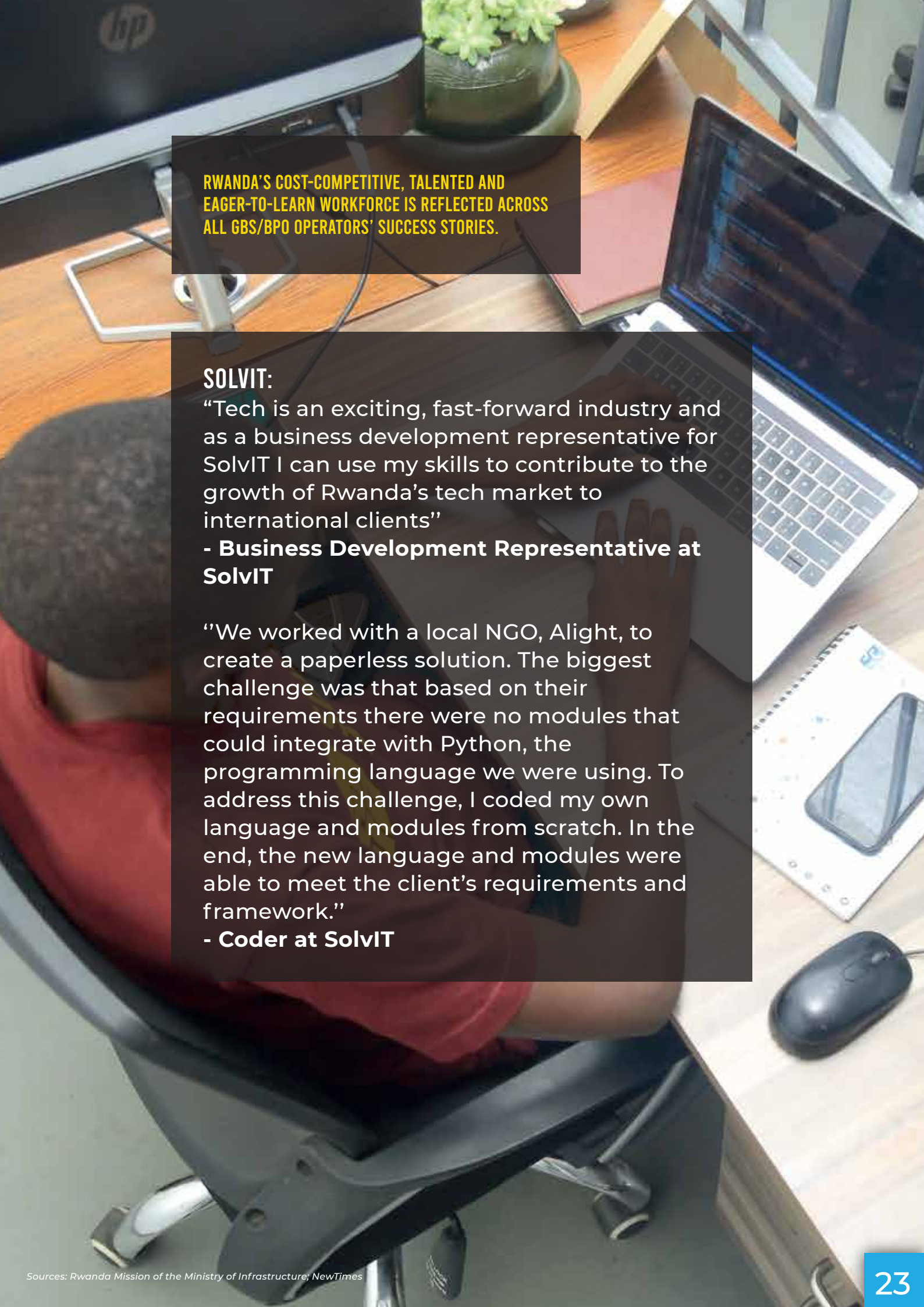


# ENABLING ENVIRONMENT

## Rwanda's GBS/BPO Ecosystem

Rwanda has an intricate, synergized GBS/BPO ecosystem that facilitates skills development and subsequent sector growth. There are four individualized, yet coordinated segments, including national, private, non-profit and institutionalized education, that are interlinked to form a single mega GBS/BPO ecosystem. Each segment focuses on building skills competencies within their mandates.



A high-angle photograph of a person sitting at a wooden desk in an office. The person is wearing a red shirt and is looking at a laptop. On the desk, there is a black mouse, a white notebook with a smartphone on it, and a small potted plant. A large black text box is overlaid on the image, containing text about Rwanda's workforce and two quotes from SolvIT employees.

**RWANDA'S COST-COMPETITIVE, TALENTED AND EAGER-TO-LEARN WORKFORCE IS REFLECTED ACROSS ALL GBS/BPO OPERATORS' SUCCESS STORIES.**

**SOLVIT:**

“Tech is an exciting, fast-forward industry and as a business development representative for SolvIT I can use my skills to contribute to the growth of Rwanda’s tech market to international clients”

**- Business Development Representative at SolvIT**

“We worked with a local NGO, Alight, to create a paperless solution. The biggest challenge was that based on their requirements there were no modules that could integrate with Python, the programming language we were using. To address this challenge, I coded my own language and modules from scratch. In the end, the new language and modules were able to meet the client’s requirements and framework.”

**- Coder at SolvIT**

# TRANSPORT INFRASTRUCTURE

## Getting to Rwanda

Rwanda's transport infrastructural landscape has morphed significantly over the last decade, assisting in providing capacity to the country's budding GBS/BPO sector.

## Airport Transport Infrastructure

**KIGALI INTERNATIONAL AIRPORT IS LOCATED 10 KM FROM KIGALI CITY CENTER**

**KIGALI INTERNATIONAL AIRPORT SERVES DOMESTIC, REGIONAL AND INTERNATIONAL FLIGHTS TO 31 DESTINATIONS IN 22 COUNTRIES**

**DIRECT INTERNATIONAL FLIGHTS TO THE UK, UAE, BRUSSELS AND AMSTERDAM AND NEW DIRECT CONNECTIONS TO NEW YORK**

**856,000 PASSENGERS TRAVELLED THROUGH RWANDA IN 2020 AND IS EXPECTED TO REACH 2.1 MILLION BY 2024**

**THE NEW KIGALI (BUGESERA) INTERNATIONAL AIRPORT WILL BE COMPLETED BY THE END OF 2022 WITH A CAPACITY OF 4.5 MILLION PASSENGERS PER YEAR**

Public transport has grown in organization, reliability and sophistication over the last two decades in Rwanda.

## Transport for Agents



**MOTO TAXIS ARE THE MOST CONVENIENT FORM OF TRANSPORT IN RWANDAN CITIES AND TOWNS**

**ELECTRONIC TICKETING SYSTEMS, MOBILE PHONE-BASED BOOKING SYSTEMS, AUTOMATED FARE COLLECTION SYSTEM, FREE WIFI INTERNET FOR INTER-CITY BUSES AND TAXI PARKS ARE SOME OF THE IT BASED INITIATIVES THAT HAS MODERNIZED RWANDA'S PUBLIC TRANSPORT**

**OUT OF THE BUSES THAT OPERATE IN KIGALI, 90% ARE CITY BUSES (80-SEATER) WHILE THE COASTERS (30 SEATERS) ARE DESIGNATED FOR THE PROVINCES.**

**TRANSPORT FEES BY MOTO TAXI ARE AS FOLLOWS:**  
**MINIMUM PRICE OF US\$0.28**  
**MAXIMUM PRICE OF US\$1.09**

**TRANSPORT FEES BY BUS ARE AS FOLLOWS:**  
**MINIMUM PRICE OF US\$0.27**  
**MAXIMUM PRICE OF US\$0.57**

**TRANSPORT FEES BY MINIBUS TAXI ARE AS FOLLOWS:**  
**MINIMUM PRICE OF US\$0.57**  
**MAXIMUM PRICE OF US\$2.14**



# TRANSPORT INFRASTRUCTURE

## Immigration Visas

The Rwandan government has made significant reforms in the country's Visa process and requirements and making it relatively easier for foreign nationals to enter Rwanda.

**TRAVELLERS FROM ALL COUNTRIES CAN OBTAIN A VISA ON ARRIVAL AT KIGALI INTERNATIONAL AIRPORT AND ALL LAND BORDERS**



**AFRICAN UNION, COMMONWEALTH AND LA FRANCOPHONIE**



**MEMBER COUNTRIES OF THESE INTERNATIONAL ORGANIZATIONS THAT RECEIVE A VISA UPON ARRIVAL WITH ZERO FEES**



## FEES AND DURATION OF VALIDITY

**US\$50**

Single Entry  
Tourist Visa,  
Valid for 30 Days

**US\$30**

Single Entry  
Conference Visa,  
Valid for 30 Days

**US\$50**

Multiple Entry  
Business Visa,  
Valid for 1 Year

**US\$100**

East African Tourist  
Visa (EATV)  
including Rwanda,  
Kenya and Uganda,  
valid for 90 Days



**RWANDA'S COST-COMPETITIVE, TALENTED AND EAGER-TO-LEARN WORKFORCE IS REFLECTED ACROSS ALL GBS/BPO OPERATORS' SUCCESS STORIES.**

**TEK EXPERTS RWANDA:**

“The engineers there (Tek Experts Rwanda) have a real pride working with international customers and organizations. They talk about their pride and how their family is proud of what they do. This isn't just a job for them, it's something they love doing and are proud to do”

**- Micro Focus**

# ICT AND CONNECTIVITY

**ICT is seen by the Rwandan government as the central pillar of Rwanda's transformation to a knowledge-based economy and growth of its GBS/BPO sector.** In fact, the Rwandan treasury has allocated a budget to ICT development as a percentage of its GDP that is in line with OECD countries.

It comes as no surprise that Rwanda has one of the fastest-growing ICT sectors in Africa, growing by 29% in 2020 and contributing 3% to the national GDP. Growth is expected

to be accelerated further by the implementation of the ICT Sector Strategic Plan, with key objectives in far-reaching broadband coverage, digitization of government services and the provision of digital literacy across all education levels. Successful intra-regional coordination has made it possible for Rwanda, a land-locked nation, to be connected to the undersea cable system via Uganda, through Kenya and Tanzania.

## Undersea Cables Connecting Rwanda to the Global Connectivity Grid

UNDERSEA CABLE	CAPABILITY
SEACOM	5.6 TBPS



As such, Rwanda has been able to facilitate the laying of a fibre optic backbone of 7 000 kilometers. Rwanda's internet connection capacities are comparable and, in some cases, exceeds those of other middle-income

economies. Recording average download speeds of 30 Mbps, Rwanda is among the top 10 African economies with the fastest and most reliable internet speeds.

## Communications & Telecoms Infrastructure

INFRASTRUCTURE	CAPABILITY
INTERNET	FIBRE OPTICS, WIRELESS, 4G LTE, 4G, 3G, DSL
MOBILE	4G LTE, 4G & 3G. 15.26 MBPS DOWNLOAD
FIBRE	30 MBPS DOWNLOAD; 22.65 MBPS UPLOAD

# ICT AND CONNECTIVITY

The robust ICT infrastructure has played a vital role in pushing down communications and telecoms costs and strengthening connectivity reliability in Rwanda. Voice over Internet Protocol (VoIP),

mobile communications, mobile data and fibre internet connectivity have become increasingly more affordable, providing sufficient connectivity supply for GBS/BPO operations.

## Communications & Telecoms Costs and Reliability

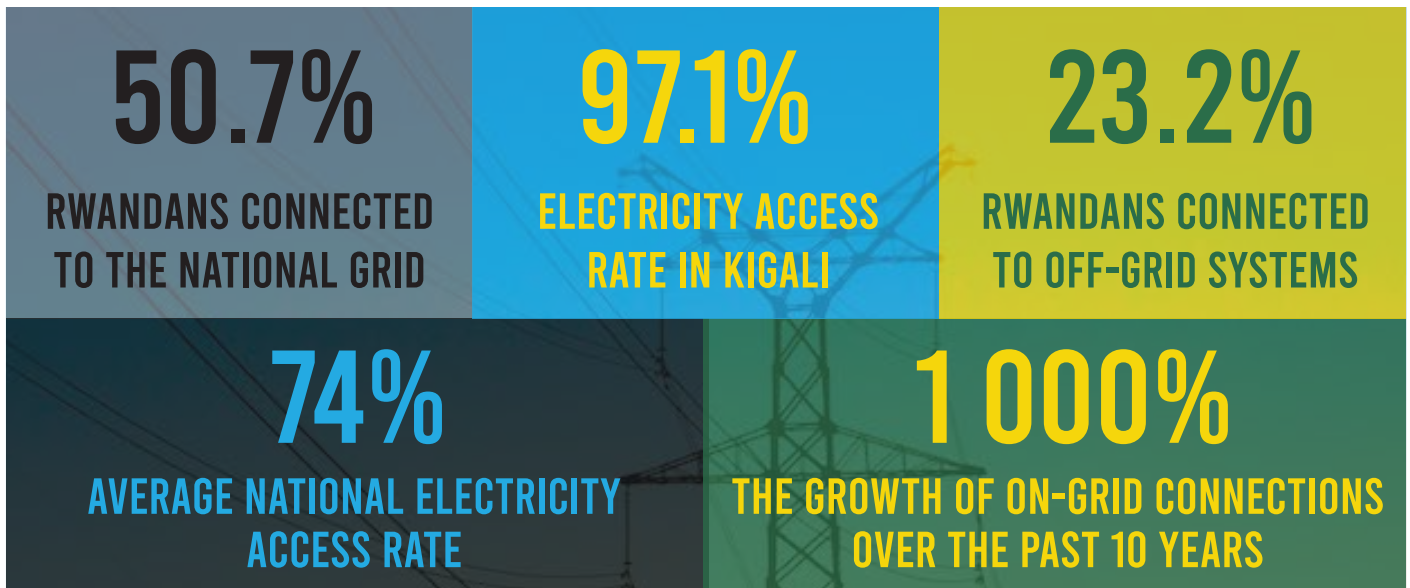
AVAILABLE SERVICE	POOR	SATISFACTORY	GOOD	PRICING
VOIP			✓	US\$0.12 PER MIN
MOBILE COMMS			✓	LOCAL: US\$0.002 PER MIN INTERNATIONAL: US\$0.26 PER MIN
MOBILE DATA			✓	US\$1.25 PER 1 GIG
FIBRE			✓	US\$39 P/M FOR 50 MBPS

# ELECTRICITY RELIABILITY

One key factor supporting the growth of Rwanda's GBS/BPO sector is the reliability of the electricity connection, especially in Kigali. Rwanda has made significant investments in improving its electricity infrastructure in recent years. These efforts have paid off, with

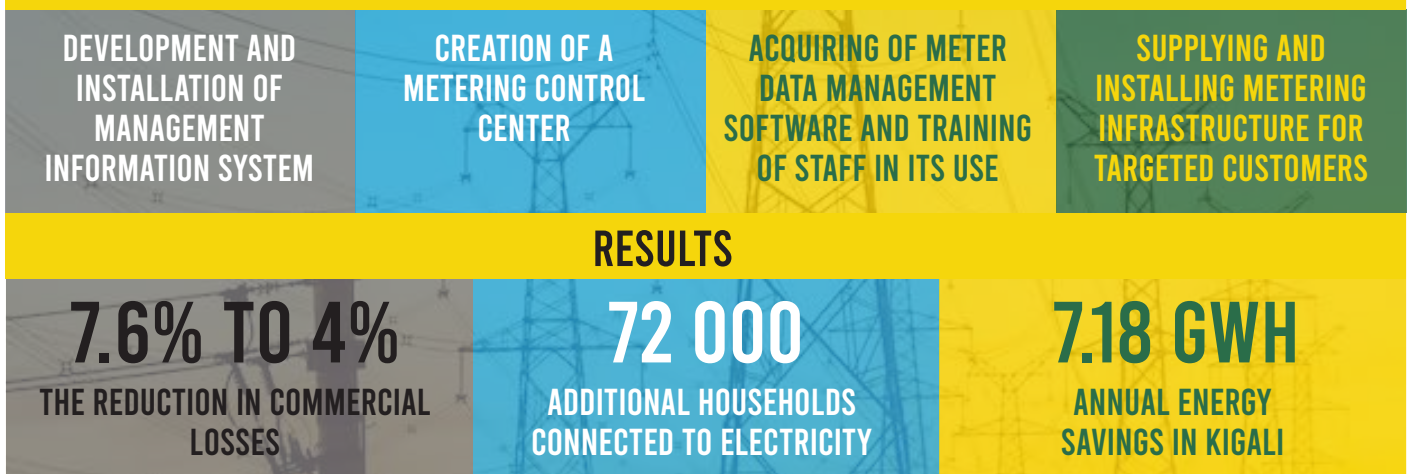
the country now having one of the most reliable power supplies in Africa. This is a major advantage for GBS/BPO operators, as it greatly reduces the risk of power outages disrupting operations.

## Rwanda's Electricity Reliability Overview

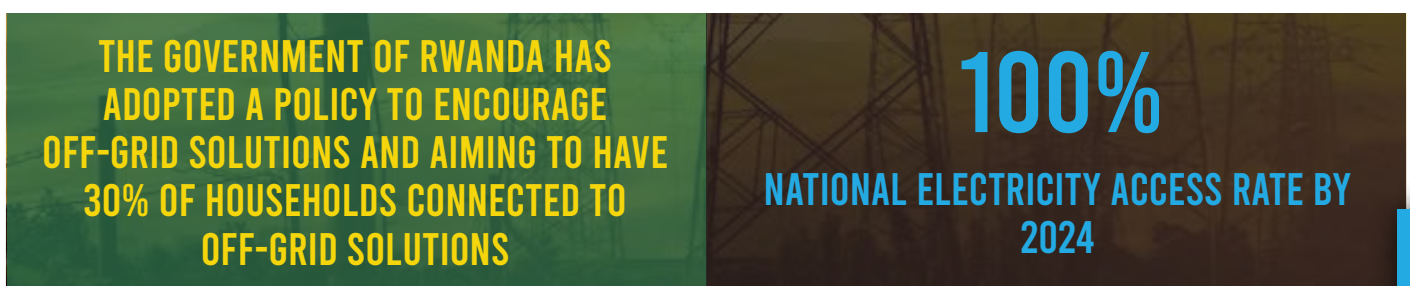


## Rwanda Electricity Sector Strengthening Project (2015-2021)

### ELECTRICITY SECTOR CAPACITY STRENGTHENING



## Government of Rwanda's Energy Capacity Goals



# KIGALI INNOVATION CITY

A further boost to Rwanda's ICT and GBS/BPO value proposition is the ongoing development of the Kigali Innovation City (KIC), a mixed-use innovation city to be located on 60 hectares of land within the Kigali Special Economic Zone. With a focus on ICT and innovation, KIC will provide a supportive and connected ecosystem for pan-African start-ups, financial investors, innovation development and academia.

## The KIC features

- o Academia including Carnegie Mellon University Africa (CMU), University of Rwanda - Center for Biomedical engineering & E-Health, African Leadership University (ALU) and the African Institute of Mathematical Sciences (AIMS) Rwanda. Currently, CMU, ALU and AIMS Rwanda are operational.
- o Commercial space for offices, research labs and incubators
- o Supporting facilities for retail, hospitality and accommodation services
- o Attractive tax incentives for construction



The KIC presents GBS/BPO operators, investors and buyers opportunities to leverage newly-qualified talent and sophisticated physical and ICT infrastructure.

## KIC Key Impacts

**4,000**  
**EXPECTED ANNUAL**  
**UNIVERSITY**  
**GRADUATES**

**50,000**  
**EXPECTED**  
**JOBS**  
**TO BE CREATED**

**US\$150 MILLION**  
**EXPECTED VALUE**  
**OF ANNUAL ICT**  
**EXPORTS**

# CONCLUSION

Rwanda is a country on the rise with immense potential in the GBS/BPO sector. With its harmonious workforce, competitive salaries and excellent physical and ICT infrastructure, Rwanda's global services delivery is gaining exponential traction.

Sharpening the country's GBS value proposition is its 43,000-strong pool of potential and trainable English-speaking workers that can be tapped by medium-to-mid-sized international operators and investors to scale operations.

Moreover, Rwanda's favorable investment environment and customizable GBS incentives make it an ideal place to do business, all of which were developed within a cooperative, synergized stakeholder ecosystem.

As such, Rwanda is poised to become a leading destination for global business buyers looking to outsource their business functions and operators to leverage this advantageous operating environment.

**G:ENESIS**



## DEFINITION OF B2 ENGLISH-SPEAKING TALENT

English level B2 is the fourth level of English in the Common European Framework of Reference (CEFR), a definition of different language levels written by the Council of Europe. In everyday speech, this level might be called “confident”.

The official level descriptor is “upper intermediate”. At this level, students can function independently in a variety of academic and professional environments in English, although with a limited range of nuance and precision.

## METHODOLOGY OF B2 ENGLISH-SPEAKING TALENT POOL

This derived from a formula formulated by Genesis GBS, where youth that are unemployed but have a secondary school and tertiary qualification, annual secondary school leavers that enter the labour force and tertiary education graduates that are not immediately absorbed into the labour market were factored together. The estimated B2 English-speaking talent pool growth potential was calculated by multiplying the total addressable talent pool by Rwanda’s English-speaking population percentage. This gave the final estimated English-speaking growth potential in Rwanda.

However, this pool of talent is still required to go through work readiness and other pre-employment training.