

Kenya BPO Market Report 2026

Market sizing, growth trajectory and sector structure for Kenya's BPO/GBS industry — including the services share of GDP and the 100,000-jobs-by-2030 target.

Contents

3	Executive summary
5	1. Market size & growth Sizing the GBS/BPO sector and its path to 2030
7	2. Employment & the 100k target The workforce today and the road to 100,000 jobs
9	3. Sector structure Sub-sectors and the move up the value chain
11	4. The wider economy & talent Services GDP, macro context and the talent base
13	5. Policy, infrastructure & investment SEZs, connectivity, FDI and global standing

Executive summary

Kenya's Global Business Services (GBS) and BPO industry has moved from emerging to accelerating. The market is valued at roughly **\$700 million in 2025**, grew **18.8% between 2023 and 2024**, and is projected to reach **\$1.5 billion by 2030** — with the international BPO segment alone forecast to approach **\$1 billion**.

Behind that growth is a young, English-speaking workforce, a services sector that already accounts for **55.3% of GDP**, and a government treating digital services as a national priority. The current GBS workforce of about **36,000** is targeted to reach **100,000 by 2030**, supported by the Ajira Digital programme and a pipeline of more than 10,000 ICT graduates a year.

Policy has caught up with ambition. In August 2023 Kenya removed the 30% local-equity requirement for ICT companies, enabling fully foreign-owned operations, and new SEZ categories now offer a **10% corporate tax rate** for the first decade. Foreign direct investment passed **\$2 billion for the first time in 2025**. This report sizes the opportunity, maps the sector, and sets out the policy and infrastructure that underpin it.

About the data: Figures are drawn from KNBS (Economic Survey 2025), KenInvest, BPOAK and Genesis Analytics, as understood for 2025/26. Sources differ on some definitions (total GBS vs. BPO-only) and on job targets; where they do, this report uses the most consistent published figures and notes the alternatives.



SECTION ONE

Market size & growth

Sizing Kenya's GBS/BPO sector and its trajectory to 2030.

Market size & growth

Kenya's total GBS market is estimated at about **\$700 million in 2025**, split between a domestic segment of roughly **\$442 million** and an international segment of about **\$267 million**; the broader BPO sub-sector is valued near **\$430 million**. The sector expanded at an **18.8% annual rate between 2023 and 2024**, comfortably ahead of the wider economy, and an accelerated scenario assumes up to 30% per year as SEZ incentives take effect.

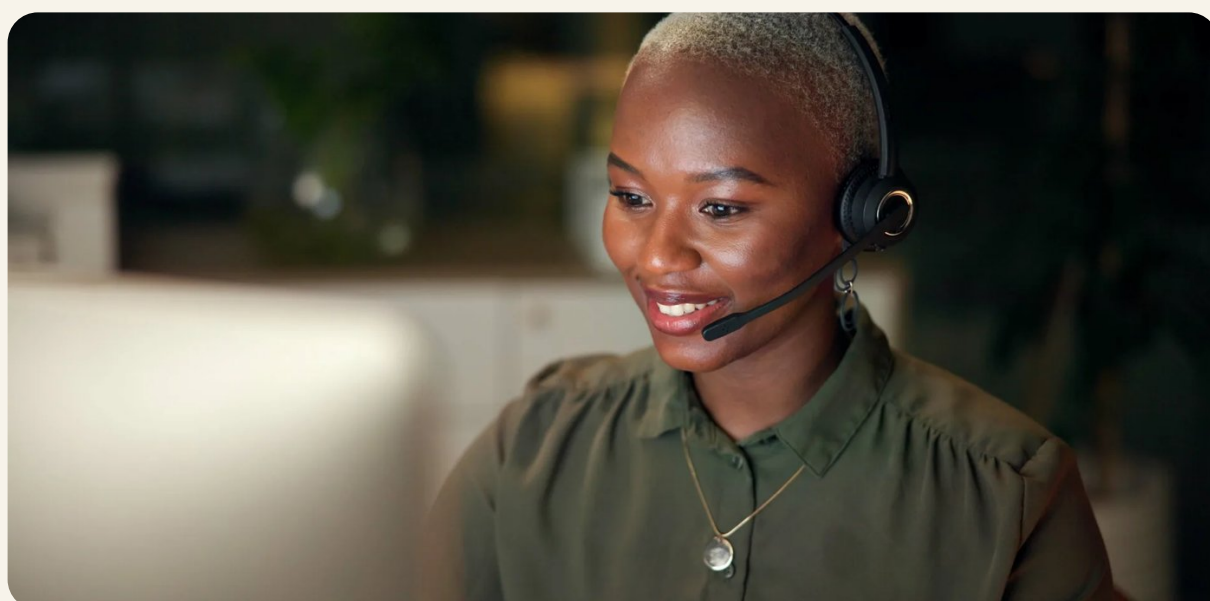
Kenya GBS / BPO market segmentation (USD millions)

Component	2021	2023	2025 (est.)	2030 (proj.)
Total GBS market value	450	580	700	1,500
International GBS value	110	165	267	700
Domestic GBS value	340	415	442	800
BPO sub-sector value	180	240	430	1,000
Number of active firms	~200	~250	300+	500+

The forecast to 2030

On a base case, Kenya's total GBS market reaches **\$1.5 billion by 2030** and the BPO sub-sector approaches **\$1 billion**; an accelerated case puts the BPO market as high as **\$1.5 billion**. The number of active firms is expected to pass 500. Growth is being driven by three forces at once: the SEZ tax regime lowering the cost of formal operations, the removal of foreign-ownership limits opening the door to multinationals, and a structural shift in global demand toward Africa as buyers diversify away from concentration in a small number of Asian hubs.

For context, the global BPO market was about **\$280.6 billion in 2023**, heading toward **\$415.7 billion by 2025** — a market in which India alone holds a 55% offshore share. Kenya currently accounts for only about 3.4% of Africa's \$8 billion BPO market, which is precisely why its growth runway is so long: a small base, a credible value proposition, and a policy tailwind.



SECTION TWO

Employment & the 100k target

The workforce today and the path to 100,000 jobs by 2030.

Employment & the 100,000-jobs target

Kenya's GBS workforce stands at about **36,000 people in 2025** (precisely 36,394 on the GBS measure). The headline ambition is to reach **100,000 jobs by 2030** — a target the country's ICT graduate output is judged sufficient to meet.

36k

GBS workforce, 2025

100k

Jobs target by 2030

15–20%

BPO attrition (low for sector)

Capacity to scale

The sector can absorb up to **17,000 new agents a month** without diluting quality, with typical training lead times of just **3–6 weeks**. Attrition runs at a sector-low **15–20%**, well below the 31–45% common in some Asian hubs — a direct consequence of an “education surplus” in which degree-holders take internationally facing roles and stay in them. Low attrition is not a soft metric: it protects institutional knowledge on long-running accounts and lowers the re-hiring and re-training costs that quietly erode offshore savings elsewhere.

The **Ajira Digital programme** — a partnership between government, KEPSA and the Mastercard Foundation — aims to train one million young people for digital and BPO work, and has already established hundreds of constituency innovation hubs. Alongside it, programmes such as Generation Kenya report an 85% placement rate, feeding a steady pipeline of work-ready candidates into the sector.

Note on targets: Sources cite more than one goal. The **100,000-by-2030** figure (Genesis Analytics) is this report's headline; the government's broader Vision 2030 ambition references up to **300,000 direct BPO jobs** and, more widely, one million digital and BPO jobs. The figures reflect different scopes rather than direct contradictions.



SECTION THREE

Sector structure

Sub-sectors and the move up the value chain.

Sector structure

Kenya's sector is no longer just call centres. The market is shifting decisively from traditional voice work toward higher-value "project" and "operational" services — managed cloud infrastructure, content moderation and complex back-office processing.

The sub-sectors

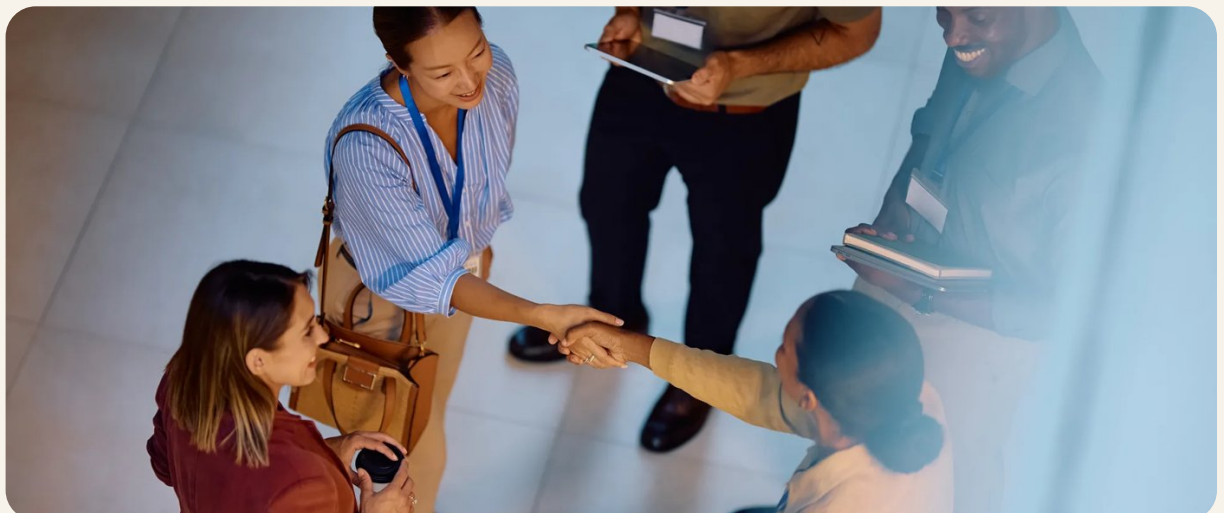
The fastest-growing areas map to Kenya's graduate strengths. **Customer experience (CX)** remains the volume base, but **finance and accounting** outsourcing draws on a deep IFRS-trained talent pool; **legal process outsourcing** uses common-law-trained paralegals and lawyers; and **software development and IT support** tap the 8,600+ computing graduates produced each year. The standout growth story is **data services for AI** — data annotation, labelling and content moderation — where Kenya now ranks in Africa's top five for AI-skills growth and hosts a cluster of human-in-the-loop providers serving global technology firms.

Kenya BPO/KPO sub-sectors

Segment	Examples
Customer experience	Voice, chat, email, omnichannel support
Finance & accounting	Bookkeeping, AP/AR, IFRS reporting, payroll
Legal process	Paralegal, research, transcription, conveyancing support
Technology	Software development, QA, IT help desk
Data & AI	Annotation, labelling, content moderation

Moving up the value chain

This mix matters for buyers because it changes what Kenya competes on. Where high-volume voice is a race to the lowest cost, knowledge-process work competes on quality, qualifications and English — areas where Kenya is genuinely differentiated rather than merely cheap. Industry analysts increasingly describe the country as a "new up-and-comer" capable of moving beyond front-line roles into technical support, analytics and AI-enablement, which is exactly where margins and client stickiness are highest.



SECTION FOUR

The wider economy & talent

Services share of GDP, macro context and the talent base.

The wider economy & talent

The BPO sector sits inside a services-led economy. Services accounted for **55.3% of GDP in 2024**, having held above 55% for three years, and ICT output reached **KSh 701.3 billion**. The wider economy — **KSh 16.2 trillion** in 2024 — grew 4.7% with inflation easing to 4.5% and the shilling stabilising after its 2023 lows.

Macro context (2024)

Indicator	Value
GDP	KSh 16.2 trillion (4.7% real growth)
Services share of GDP	55.3%
ICT sector output	KSh 701.3 billion
Inflation	4.5% (down from 7.7% in 2023)

The talent base

Kenya produced **123,928 university graduates in 2024** (up 24% year on year), including **8,627 in computing/ICT** and 28,005 in business and administration, from a system of 78 universities. The country has the third-largest B2-level English-speaking pool in Africa at **642,000**, more than **40,000 ICPAK-certified accountants**, and 87% of its population under the age of 35.

Crucially, the domestic economy cannot yet absorb all of this output — youth unemployment is high and graduate supply outstrips formal job creation. For international buyers this “education surplus” is the core of the value proposition: degree-holders are available for roles that elsewhere require only secondary education, delivering higher productivity, faster onboarding and stronger retention than the price alone would suggest.



SECTION FIVE

Policy, infrastructure & investment

SEZ incentives, connectivity, FDI and Kenya's global standing.

Policy, infrastructure & investment

Policy and incentives

In **August 2023** Kenya removed the 30% domestic-equity requirement for ICT companies, allowing fully foreign-owned subsidiaries. The Business Laws (Amendment) Bill 2025 created SEZ categories specifically for BPO and services, where corporate tax is **10% for the first ten years and 15% (or 25%) thereafter** versus the standard 30%, alongside VAT and import-duty exemptions and expedited work permits. The flagship **Konza Technopolis** is being built as a dedicated, plug-and-play BPO ecosystem 64 km south of Nairobi.

Infrastructure

Kenya is served by up to **eight undersea fibre cables** landing at Mombasa, a national backbone extended toward 100,000 km, and internet penetration above **85%** in the main corridors. A **renewable-heavy grid — around 80%, led by geothermal** — gives operators a genuine ESG and “green BPO” advantage that is increasingly material to enterprise buyers with net-zero commitments.

Investment and standing

In 2025 FDI inflows grew more than 15% to exceed **\$2 billion for the first time**, with Europe — led by the UK and Netherlands — the dominant source. Kenya is the **highest-ranked African nation on the Network Readiness Index (70th)**, ranks 11th on the Ataraxis Outsourcing Index, and scores in the “high” band for English proficiency. Taken together, the policy reform, the connectivity, the clean-energy edge and the investment momentum make Kenya a credible, scalable destination rather than a speculative one.

Explore the full market picture

Outsourcing.ke tracks the data, talent and policy shaping Kenya’s BPO market. See the full set of reports and guides at outsourcing.ke.



[Learn more at outsourcing.ke](https://outsourcing.ke)

Figures reflect data understood to be current for 2025/26 from KNBS, KenInvest, BPOAK and Genesis Analytics. For general information only; verify against primary sources before relying on specific figures.



Kenya BPO Market Report 2026

Kenya outsourcing market intelligence — data, guides and analysis for UK businesses building offshore teams.