GAUTENG GLOBAL BUSINESS SERVICE VALUE PROPOSITION





GAUTENG DEPARTMENT OF ECONOMIC DEVELOPMENT

GAUTENG PROVINCE
ECONOMIC DEVELOPMENT
REPUBLIC OF SOUTH AFRICA

the dtic
Department: Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

BPESA Business Process Enabling South Africa

investSA ONE STOP SHOP

GGDA GAUTENG GROWTH AND DEVELOPMENT AGENCY

G:ENESIS GLOBAL BUSINESS SERVICES

GGT2030 GROWING GAUTENG TOGETHER

Global trends in GBS/BPO demand

The global GBS/BPO industry helps businesses reduce costs and improve efficiency. Offshoring BPO and IT services to Africa has the opportunity for **job creation scale by exporting services to the world.** The sector **employs almost 43 Million people.** Africa currently provides only 2.5% of this global workforce.

Regional Split of Global IT and Business Workforce, 2022

Region	Workforce Size	Shares
Africa	1.02 million	2.5%
Other	1.9 million	4.5%
Latin America	3.5 million	8%
Europe & UK	9.66 million	22.5%
North America	12.73 million	30%
Asia-Pacific	14.09 million	32.5%
Total	**42.93 million**	

Sources: GBS.World | Genesis GBS | Gartner | Deloitte

$1,01 TRILLION — **Projected global demand for BPO and IT services by the end of 2023**

42.93 MILLION — **Estimated global BPO and IT services workforce in 2023**

8% — **Average compound annual growth rate for the sector since 2018**

© 2023 Copyright Genesis Global Business Services (Pty) Ltd

Global trends in GBS/BPO demand

Customer Support and Sales

High scale potential: voice-based and digital customer service and sales services. Less complex entry-level roles. **Expected global demand growth of 24%[1]**

IT Services

High scale potential: IT helpdesk support, software/web/app development and data analytics/annotation/management. Requires more complex services. **Expected global demand growth of 27%[1]**

HR Management

Accelerating scale potential: recruitment, payroll learning, benefits administration and employee performance/ wellness services. Demand is for more complex positions with low scalable job creation.



Accelerating scale potential: back-office accounting, collections and claims processing. Less global demand and higher probability of automation. **Expected growth of 9%[1]**

Other Business Process Services

Growing scale potential: including, procurement, logistics, research and legal services. These services require smaller pools of high-end talent.

Estimates for 2023-2027, sources: Deloitte, Genesis GBS and Gartner

© 2023 Copyright Genesis Global Business Services (Pty) Ltd

Global trends in GBS/BPO demand

REDUCE COSTS

82% Of global business buyers indicate that **cost reduction** will still be their **main outsourcing objective**

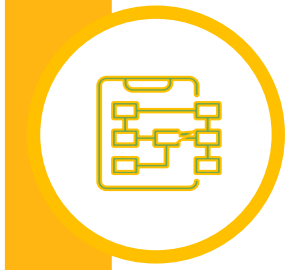


51% Of global business buyers believe **innovative and enabling technology** will help them reduce costs and improve CX





Of global business buyers are looking for greater performance and higher value services that translate into **better CX and Customer Lifetime Value (CLV)** **38%**



Data protection and security quality is still the number one criteria global business buyers look for in their service providers and nearshore/offshore locations **#1**

INCREASE VALUE

Source: 2023 Buy-Side Demand Survey Conducted by Genesis with GBS.World Marketplace Buyers

© 2023 Copyright Genesis Global Business Services (Pty) Ltd

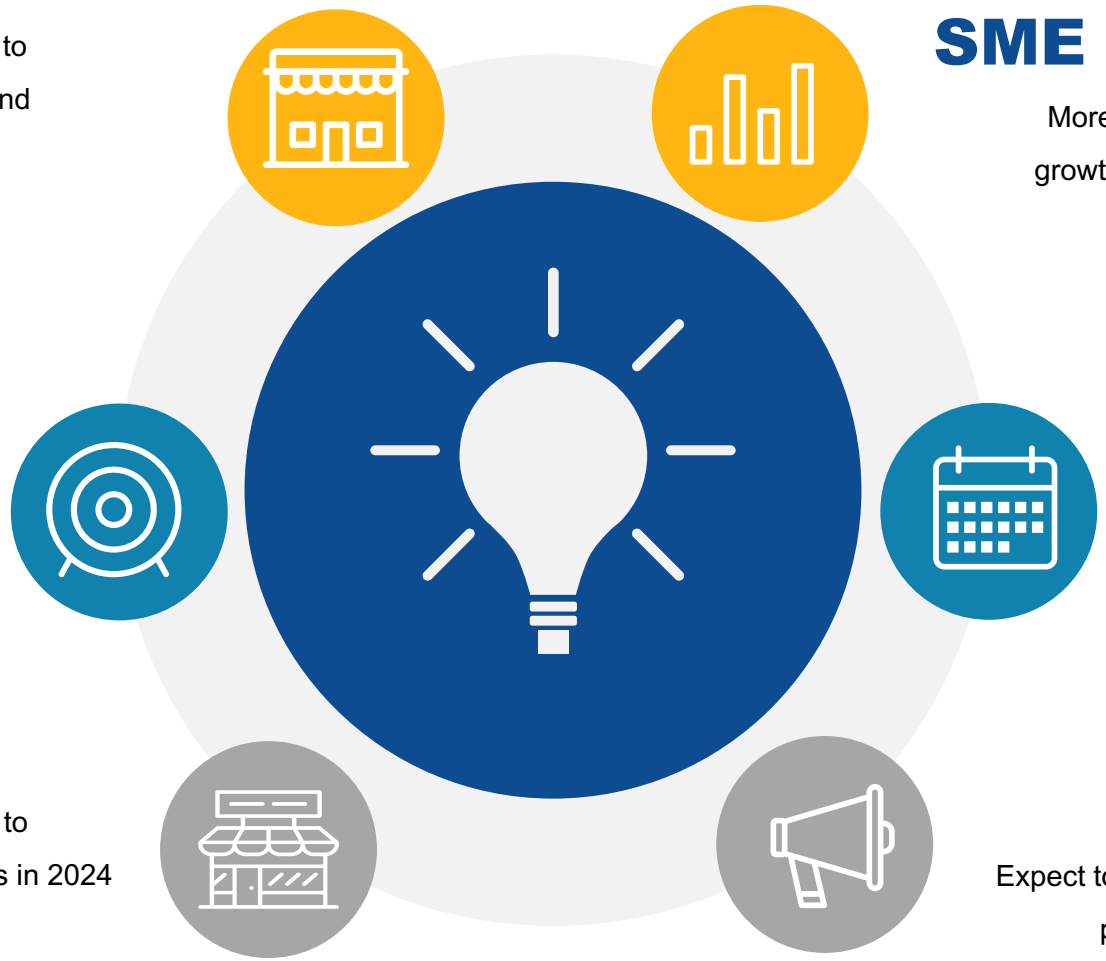
Global trends in GBS/BPO demand

56% Of enterprise buyers are looking to more boutique providers, hubs and small-scale delivery centers

SME M&As

Small and medium BPOs and ITOs will remain targets for mergers and acquisitions from source market players

87% Of small US businesses plan to outsource a business process in 2024



SME & Start-up Growth

More SME BPOs and ITOs will launch, or experience growth, in emerging markets within Africa, Asia, CALA and Eastern Europe

Social Impact

Global buyers and operators in source markets are **embracing impact sourcing hiring practices.**

Growth in MSPs

Expect to see growth in managed service provider (MSP) platforms for SMEs to collectively grow and scale

Source: 2023 Buy-Side Demand Survey Conducted by Genesis with GBS.World Marketplace Buyers

© 2023 Copyright Genesis Global Business Services (Pty) Ltd

The Future of Data Labelling and Its Impact

The future of data labelling holds immense potential to transform various industries, empowering them to leverage AI and machine learning to their fullest potential

Emerging technologies like computer vision and natural language processing **will enhance the accuracy and speed of labelling tasks**, opening doors to new possibilities

With advancements such as active learning, semi-supervised labelling, and the integration of human expertise with automated systems, **data labelling will become more efficient, cost-effective and scalable**





In 2024, the demand for data annotation and labelling services has surged dramatically, driven by the exponential growth of AI and machine learning applications across industries

Ease of Doing Business

The InvestSA One Stop Shop initiative is geared towards providing investors with services to fast-track projects and reduce government red tape when establishing a business

An investor can make an appointment, meet a government representative and **be guided by the representative through the process of setting up a business**

The One Stop **Shop simplifies administrative procedures for issuing business approvals, permits and licences** and thereby **remove bottlenecks** that investors may face in establishing and running businesses

Get your company registered in less than 24 hours

Companies and Intellectual Property Commission

US$7/ R125 — **The price the CIPC charges for the registration of the company**

US$3/ R50 — **For reserving a name using the online system**

US$9/ R175 — **Therefore, at a minimum, the amount you will need to pay to register your business is US$9/R175**

E-Services

Banks

- ABSA, FNB, Nedbank

Mobile App

- No supporting Documents needed

Walk-In Centres

- Available in all 9 provinces
- No supporting Documents needed

2024 GAUTENG GBS/BPO VALUE PROPOSITION

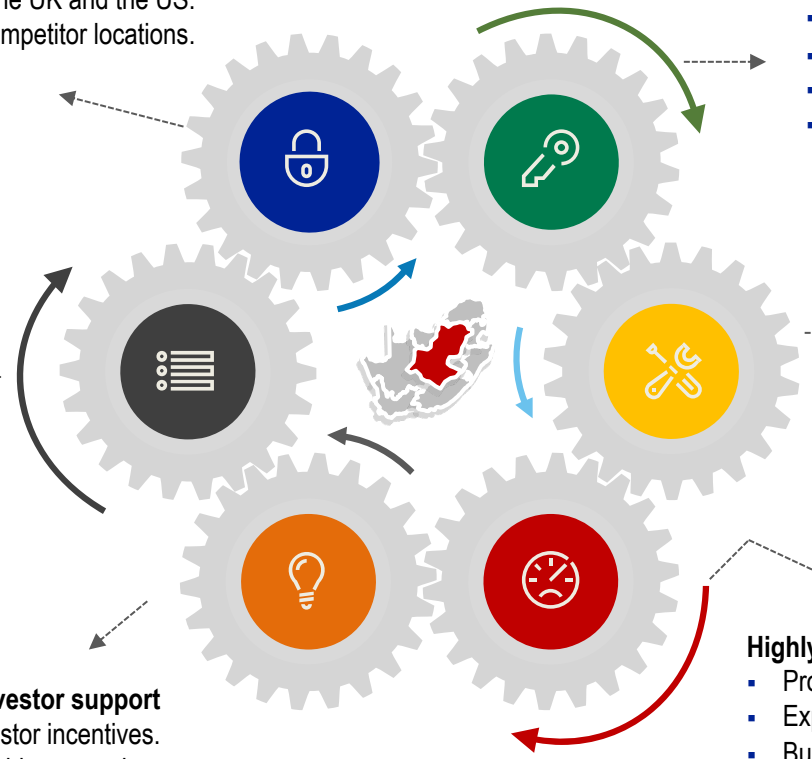
Value proposition overview: Gauteng possesses a large, multi-faceted pool of talent with specialist, niche domain skills, next-gen digital service delivery capabilities and vertical-specific shared services expertise

Multi-faceted, multi-talented skills ecosystem with low operating costs

- Biggest domestic BPO market in South Africa with over 76% market share.
- Largest relevant talent pool in South Africa (including first degree holders).
- Acclaimed B2 English-speaking service personnel with neutral accents and high empathy levels.
- Diverse customer service and digital skills pipeline through impact sourcing.
- Cost of operations are at least 60%-70% lower than those in Australia, the UK and the US.
- 25 to 30% lower opex costs when benchmarked with other competitor locations.

Sophisticated, niche domain skills in back office, HR and F&A

- Highest availability of qualified talent including CAs, CFAs and actuaries.
- World-renowned delivery centres for finance & accounting (F&A)
- Proficient HR, recruitment, and learning services support.
- Strong back-office capabilities in web chat, social media and instant messaging.
- Proven capabilities in demand-driven back-office processing services.



Globally recognised vertical industry shared services expertise

- The business hub for regional headquarters in South Africa and sub-Saharan Africa.
- Reputable vertical specific expertise with largest concentration of co-sourced centres in banking and insurance
- Flourishing retail and technology shared services expertise.
- Notable shared services global delivery centres in legal services.

The national hub of internationally respected legal and credit lifecycle management expertise

- Established debt recovery and credit lifecycle management centres.
- Automated and AI-enabled recovery solutions and technology.
- Respected attorneys, lawyers and legal specialists.
- Recognised service proficiency in globally required ALS services.

Robust enabling infrastructure and investor support

- Strong provincial and national government support with investor incentives.
- Established Tier 1 and 2 and growing Tier 3 cities and towns for scalable expansion.
- First class air and road transport infrastructure with 141 direct flights.
- Great lifestyle, cost-effective living standards and operating environment.
- Sound financial sector ranked 19th by the World Economic Forum.
- Leading-edge enabling technology and communications platforms with global connectivity.

Highly advanced KPO and ITO hubs with intensive digital delivery capabilities

- Proficient medical, research and analytics KPO capabilities.
- Expanding network of software, platform and app development service providers.
- Burgeoning automation capabilities, AI and enabling technology.
- Availability of predictive, prescriptive and social media analytics competencies.
- Notable delivery of data annotation services, leveraging the province's digital talent and ensuring accuracy and efficiency.

National GBS Value Proposition

Significant cost-performance savings and customer lifetime retention

- **60 – 70% lower costs** than Australia, the UK and the US.
- 25 to 30% lower opex costs when benchmarked with other competitor locations.
- Attractive incentives bring costs in line with India, Philippines and Jamaica.
- **18% better customer experience** with greater customer lifetime value (CLV).

Sophisticated infrastructure and enabling environment

- **Ease of travel** and accessibility with 141 direct flights to major global business destinations in Australia, Europe, UK and US.
- Robust ICT infrastructure with **global connectivity**.
- Numerous digital hubs and special technology and economic zones.
- Notable **government support** at national, provincial and sectoral levels.

Sizeable regional and domestic market player

- **Gateway to the African continent** with regional GBS/BPS&O hub and spoke delivery capacity.
- **Largest domestic market in Africa** with deep domain knowledge in BFSI, retail and telecom.
- Availability of skilled talent across multiple business locations and tier 2 cities where work can be delivered at more competitive rates.

Proven track record of resilience, quality and compliance

- **Trusted business continuity** location with uninterrupted service delivery.
- Successful and sustained **hybrid and work-at-home** competencies.
- Strong **data protection, compliance** and regulatory policies.
- Top NPS location with I**SO-certifie**d security, contact centre and quality management processes.



Skilled English language youth workforce

- **Eloquent voice and written English-speakin**g talent with **neutral accents** and elevated levels of empathy.
- Multi-talented, results-driven agents with humble confidence and high **Emotional Intelligence (EQ)**.
- Cultural affinity with Australia, the United Kingdom and the United States.

Digitally-enabled end-to-end customer lifecycle management

- **Globally-recognised, CX contact centres** providing inbound and outbound sales, customer service and after care support **24/7/365**.
- Multi-channel, digital delivery in chat, email, messaging and social media support.
- Evolving **IT-enabled capabilities** in omnichannel customer analytics and next generation capabilities in cloud as-a-service, AI, ML, cyber security, predictive and data analytics.

Vertical-specific domain knowledge and specialist services

- Reputable, **vertical-specific expertise** in banking, insurance, healthcare, retail, telecom, travel and utilities.
- Sophisticated business process capabilities in **F&A, legal, ITO, learning and credit lifecycle managemen**t.
- Proficient medical, research and KPO capabilities with expansion into game development, broadcasting, personalized and social services.

Scalable and diverse pool of impact sourcing talent

- Founder and custodian of African impact sourcing chapter with **1/3 impact sourcing workers.**
- **Scalable and trainable talent pool** with digital and technology adeptness.
- Entrenched Diversity, Equity and Inclusion (DEI) with a **96% multi-ethnic workforce** consisting of **89% youth**, and **65% female**.
- Growing best practice in green contact centre policies and Environmental, Social, and Governance (ESG).

©2022 BPESA and Genesis Global Business Services

Gauteng is the business and economic hub of South Africa and sub-Saharan Africa contributing 31% to the GDP of South Africa and ~6% to the GDP of the African continent



Gauteng boasts the largest provincial economy in South Africa and the 7th largest economy on the African continent (ahead of Kenya and Botswana). The province is home to 29 of the Fortune 500 companies.

Population Demographics

Provincial population:	16,1 million
Current male population:	8,05 million
Current female population:	8,04 million
Youth population aged 18 - 35	5,4 million
Percentage of youth population:	34% aged 18 - 35
Business language:	English

Major Population Areas in Gauteng and South Africa

Gauteng Cities:

City of Johannesburg	4,8 million
City of Ekurhuleni	4 million
Pretoria/Tshwane	4 million
Soweto	1,8 million
Mogale City	438 000

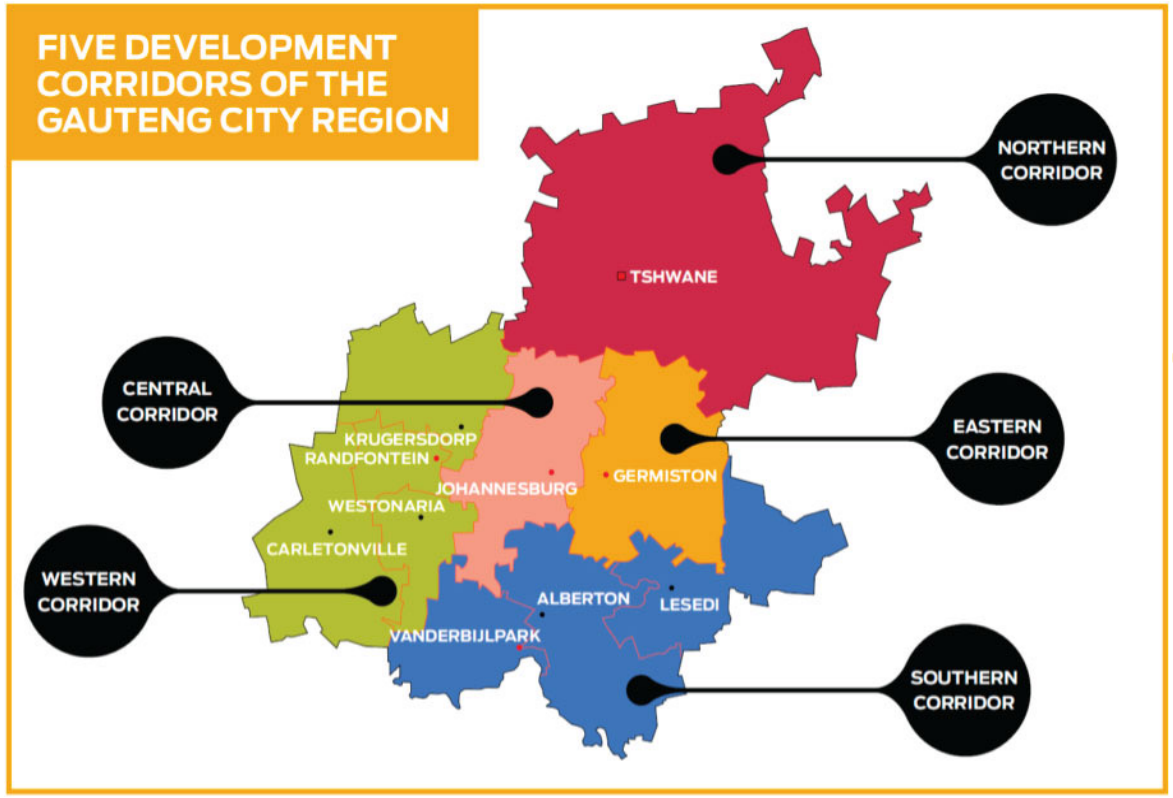
Other South African Cities:

Cape Town	4,6 million
Durban	3,9 million
Gqeberha	1,3 million

Economic Indicators

Provincial GDP:	R2,2 trillion (US$121 billion)
GDP Contribution:	31%
GDP Per Capita:	$7 539
Economic Growth:	2.8% in 2023
Inflation rate (CPI):	5.9%
Policy interest rate:	8%
Exchange rate South African rand to US$	R19.17 (February 2024)
Corporate tax rate:	27%
VAT:	15%

The Five Development Corridors in Gauteng and GBS Tier 1, 2 and 3 Hubs



Tier 1:

These are mature locations that have developed domestic IT and business process services market and have captured over 25% of offshore GBS work.

Tier 2:

These emerging, secondary locations that have growing domestic BPO markets and have captured over 10% of offshore GBS work.

Tier 3:

These are nascent locations (also known as townships) that can be developed primarily for domestic BPO services with potential to pivot into GBS services.

The City of Johannesburg, located in the Central Corridor, is driven by financial and business services. Additional core industries include ICT and pharmaceuticals.
Tier 1 locations for GBS/BPO services include Johannesburg, and Sandton.
Tier 2 locations for include Randburg.
Tier 3 locations include Soweto.

The City of Tshwane, located in the Northern Corridor, is driven by the government services sector. It is the country's administrative hub, with robust automotive, R&D, innovation and knowledge-based economies.
Tier 1 locations for include Centurion, Pretoria/Tshwane and Midrand.
Tier 3 locations include Mamelodi and Shoshanguve.

The City of Ekurhuleni, located in the Eastern Corridor, is the province's manufacturing hub, supported by robust logistics and transport sectors.
Tier 2 locations for GBS/BPO services include Alberton, Benoni, Edenvale and the greater Germiston area.

The Sedibeng district in the Southern Corridor is dominated by manufacturing. Additional projects aim to revive the agricultural sector in this region, with attempts to create new hubs of competence in the region across sectors to spur job creation and create up-skilling opportunities.
Tier 2 locations for GBS/BPO services include Vereeniging.
Tier 3 locations include Sebokeng.

The West Rand in the Western Corridor is driven by the mining sector. The provincial government plans to create new economic nodes to attract a broader spectrum of industry players to the area.
Tier 2 locations for GBS/BPO services include Krugersdorp and Randfontein.

Major GBS Brands and Operators in Gauteng

NOT EXHAUSTIVE

Major GBS/BPS&O Operators



Major Clients and Brands (Domestic and International)



Positive Testimonials and Responses from Global Buyers and Operators

Cost



"Even though salaries are somewhat higher in Gauteng then in other provinces, we have realised significant cost savings of 50% or more by basing our shared services centre in Gauteng." *UK Shared Services Operator*

"A key factor for us is that Gauteng has multiple professional and shared services centres supporting global operations at significantly lower costs." *US Enterprise Buyer*

English Fluency



"With the largest domestic BPO market, Gauteng is still untapped as a location of choice, with a scalable English-speaking employable workforce." *Pan-African BPO Operator*

"The warmth and empathy of workers coupled with good written English skills was a deciding factor for us when we outsourced to Gauteng and South Africa." *Indian BPO Operator*

Talent Supply & Scalability



"Over a period of 20 years, our operations in Gauteng grew from 7 to over 160 specialists providing accounting, billing, law and transaction services, all supported by great talent and partners." *Mastercard*

"Gauteng has exemplary skills for complex or judgment intensive legal work, such as commercial contract management, litigation documents review and investigations review." *UK Law Firm*

Time Zone Proximity



"Their flexible approach to finding solutions and their willingness to operate in EST and PST time zones has made it seamless to outsource our customer support to Gauteng." *US Enterprise Buyer*

"South Africa, and of course Gauteng, is well positioned as an outsourcing location being located in a time zone just two hours ahead of GMT." *UK Retailer*

Location of Choice



"The Google Cloud region in Johannesburg will accelerate the African tech ecosystem, providing organizations with the resources they need to scale, innovate, and compete in the global marketplace." *Google*

"We have increasingly moved more insurance BPO services and roadside assistance to Gauteng not only for the UK, but also for Australia, Canada and the United States." *UK Insurance Provider*



Multi-faceted, multi-talented skills ecosystem with low operating costs

BPESA Business Process Enabling South Africa

the dtic Department: Trade, Industry and Competition REPUBLIC OF SOUTH AFRICA

investSA ONE STOP SHOP

GAUTENG PROVINCE ECONOMIC DEVELOPMENT REPUBLIC OF SOUTH AFRICA

GGDA GAUTENG GROWTH AND DEVELOPMENT AGENCY

G:ENESIS GLOBAL BUSINESS SERVICES

Multi-faceted, multi-talented skills ecosystem and scalable talent pool with relevant sector incentives

Gauteng's talent pool has strong English language skills, a requirement for many operators in the domestic and key international source markets



1 047 701

Gauteng's Addressable Talent Pool

Includes qualified, unemployed youth not absorbed into South Africa's employment market

301 376

Gauteng's B2 English Talent Pool

B2 and higher is suitable for communicating with English-speaking customers not absorbed into South Africa's employment market

29 103

Gauteng's ramp-up speeds

Gauteng can absorb 29 103 addressable or 10 871 B2-English hires per month without depleting the talent pool

Multi-faceted, multi-talented skills ecosystem and scalable talent pool with relevant sector incentives

LARGEST RELEVANT TALENT POOL IN SOUTH AFRICA

(including first degree holders)

109 030 Total Annual Matric Graduates

75 078 Total Annual University Graduates



33 118 Total Annual Industry-relevant TVET Graduates

21 912 Total Annual Science, Engineering and Technology Graduates

Gauteng is the leading province in producing university graduates, accounting for approximately 32% of South Africa's university graduate pool

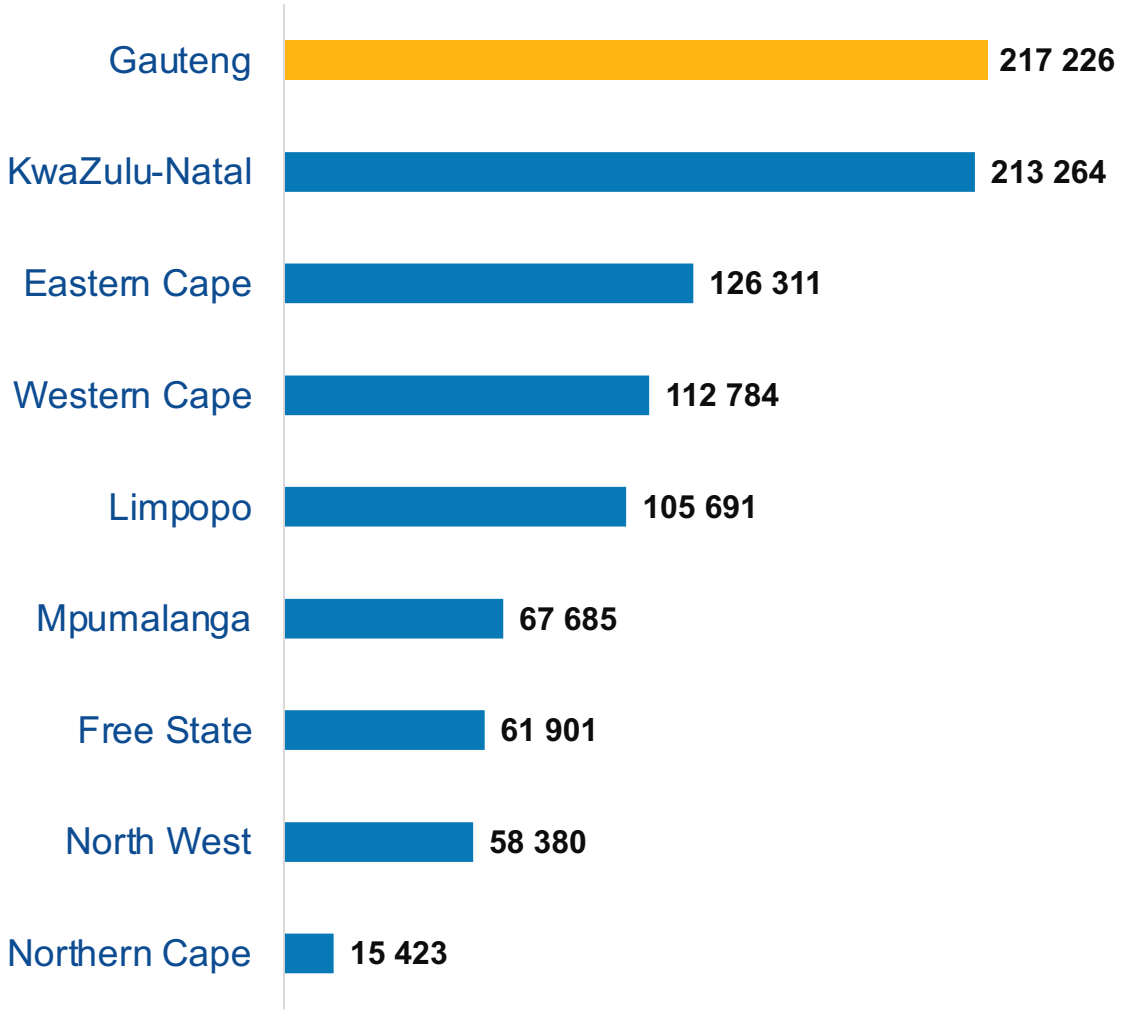
GBS/BPO Skills Development & Training Incentives

The Gauteng Provincial government supports initiatives to enhance the skills of the sector workforce and align them with the demand needs of the GBS/BPO industry. This includes:

- Stipends per worker for demand-led skills and training for **managerial and supervisory skills**.
- Stipends per worker for demand-led skills and training for specialist skills such **as data analysts, data annotators, content moderators, finance analysts, legal aids/specialists, paralegals, software developers, tech support specialists, and IT/cyber security specialists**

Largest relevant talent pool in South Africa (including first degree holders)

Est. Total Annual Matric and Tertiary Education Graduates by Province



Top 3 Provinces - Total Annual University Graduates

1	2	3
75 078 Gauteng	38 920 KwaZulu-Natal	35 878 Western Cape

Top 3 Provinces - Total Annual Industry-relevant TVET Graduates

1	2	3
37 978 KwaZulu-Natal	**33 118** Gauteng	26 286 Western Cape

Top 3 Provinces - Total Annual Matric Graduates

1	2	3
136 366 KwaZulu-Natal	**109 030** Gauteng	77 917 Eastern Cape

Gauteng is the leading province in producing university graduates, accounting for approximately **32%** of **South Africa's university graduate pool**.

The province also consistently among the top 3 for TVET and Matric talent graduate production.

Source: GBS.World | Genesis GBS; Department of Higher Education and Training 2021 Statistics on Post-school education and Training in South Africa; Gauteng.net

Acclaimed B2 English-speakers with neutral accents and high empathy

Gauteng has the Highest Concentration of English Speakers in South Africa (32.8%)

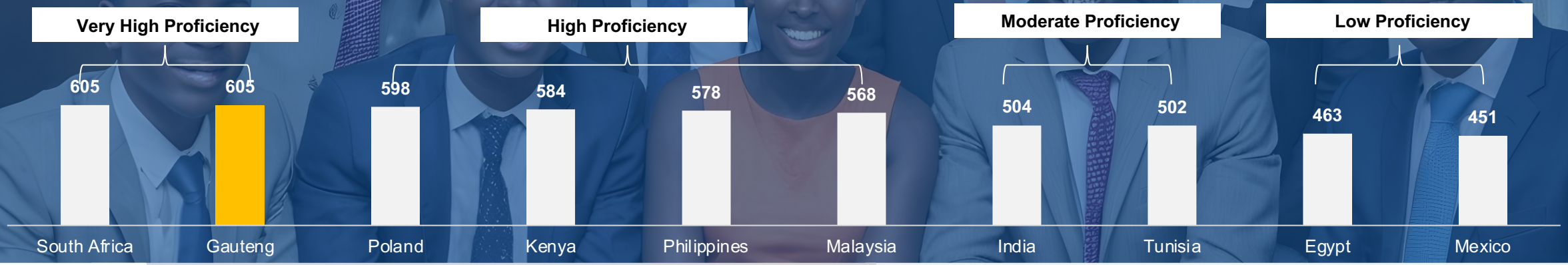
South Africa is ranked **9th out of 113** in the **Education First 2023 English Proficiency Index**

South Africa and **Gauteng Score the highest among African countries and regions for English proficiency**

South Africa and **Gauteng rank higher than Poland, Philippines, Kenya, Malaysia, India and Mexico**

English Proficiency

English Proficiency Index (EPI) Score Comparisons Across Key Competitor Markets



Emotional Intelligence

South Africa is among the **top 5** countries for **highest positive emotional experiences** out of 122 countries, ahead of **India, Malaysia, Egypt, Kenya, Jamaica, Poland & Morocco**

Warmth, patience & tolerance are notable South African cultural traits, particularly in Gauteng

Sources: Education First 2023 English Proficiency Index; Gallup 2022 Global Emotions Report, South Africa Info

Diverse customer service and digital skills pipeline through impact sourcing

Impact sourcing refers to an arm of the GBS/BPO industry that employs socioeconomically disadvantaged individuals as principal workers in delivery centres to provide high-quality, information-based services to domestic and international clients.

63 146 (est.)

Total Gauteng Domestic and International GBS/BPO Impact Sourcing Workforce

International GBS/BPO Impact Sourcing Workforce

7 718 (est.)

1/3rd

of Gauteng's GBS/BPO/CX Workforce Composed of **Impact Sourcing Workers**

Largest Domestic GBS/BPO Impact Sourcing Workforce

55 428 (est.)

Gauteng's Diverse and Inclusive GBS/BPO Workforce

91% Percentage of **Gauteng's GBS/BPO Youth Workforce (Aged 18-34)**

Gauteng's Youth Worker Composition is **Higher** than **Several Market Averages:**
Global (60%)
Philippines (65%
South Africa (89%)

64% Percentage of **Gauteng's GBS/BPO Workforce** Consisting of **Women**

Gauteng's Women Worker Composition is Higher than Some Competitor Market Averages:
- **India (50%)**
- **Philippines (55%)**

60% The number of **Workers of Black Ethnicity** in **Gauteng's GBS/BPO Workforce**

Other ethnic groups in Gauteng's GBS/BPO Workforce:
- **Mixed Race (29%)**
- **Indian (8%)**

2% Percentage of **Gauteng's GBS/BPO Workforce** Consisting of **People with Disabilities**

On average, **workers with disabilities account for 6% of the employed workforce in developed markets**.

Sources: GBS.World | Genesis GBS; BPESA Job Creation Reports

Significant, entrenched domestic services with low operating costs that can pivot into global business services

The biggest BPO-CX workforce in South Africa with over 76% market share

166 283 (est.)
Total Gauteng Domestic BPO-CX Workforce

76%
Gauteng's Composition of South Africa's Total Domestic GBS/BPO Market

23 154 (est.)
Total Gauteng International GBS/BPO Workforce

17%
Gauteng's Composition of South Africa's Total International GBS/BPO Market

With significant labour and salary savings

Gauteng offers significant labour and salary savings

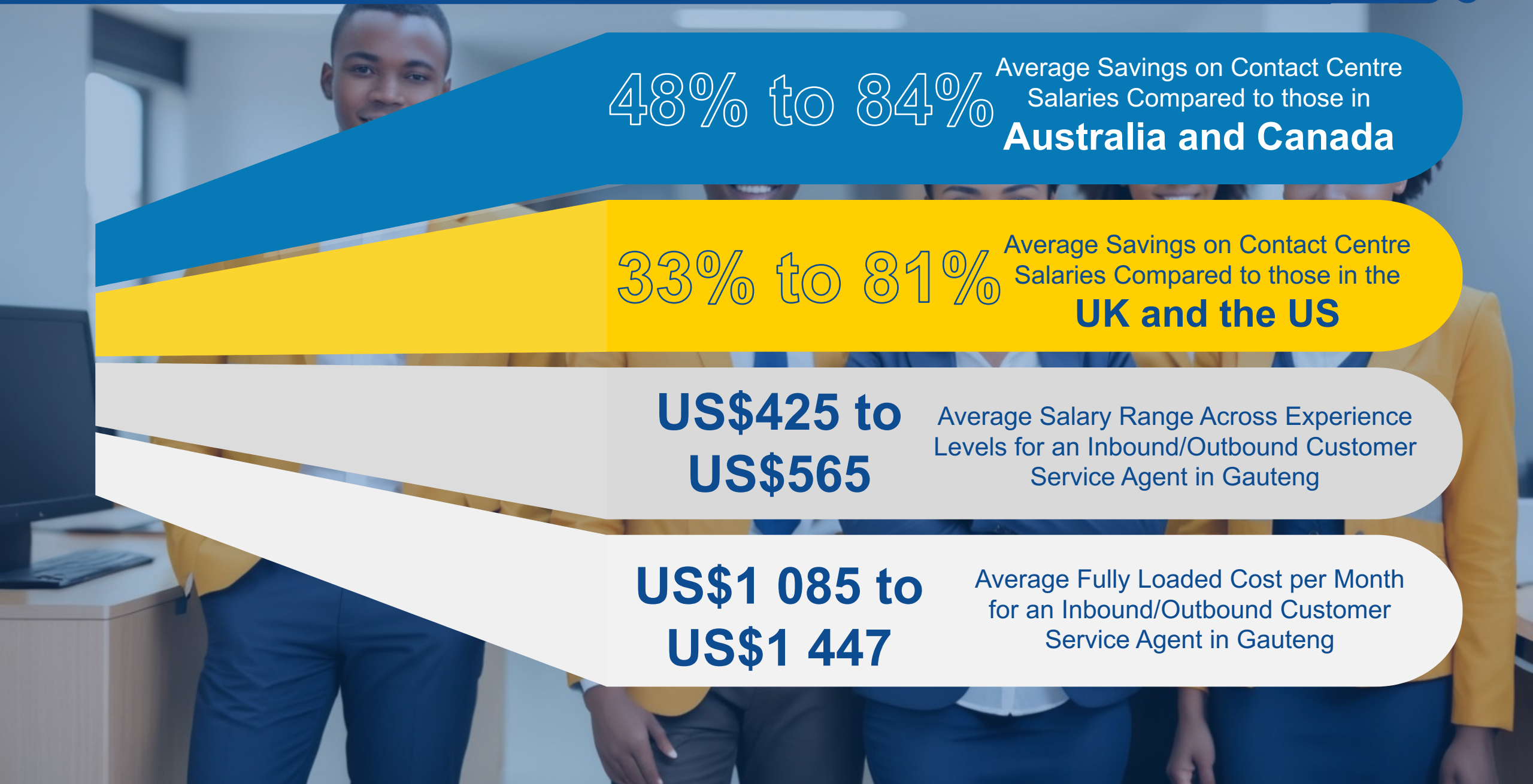
Call Center salaries are over
64% to 70% CHEAPER
than those in Australia, Europe, the UK and the US

Digital and ITO salaries are over
50% to 67% CHEAPER
than those in Australia, Europe, the UK and the US

Finance & Accounting salaries are over
59% to 63% CHEAPER
than those in Australia, Europe, the UK and the US

Legal salaries are over
30% to 50% CHEAPER
than those in Australia, Europe, the UK and the US

Multi-faceted, multi-talented skills ecosystem with low operating costs



48% to 84% Average Savings on Contact Centre Salaries Compared to those in **Australia and Canada**

33% to 81% Average Savings on Contact Centre Salaries Compared to those in the **UK and the US**

US$425 to US$565 Average Salary Range Across Experience Levels for an Inbound/Outbound Customer Service Agent in Gauteng

US$1 085 to US$1 447 Average Fully Loaded Cost per Month for an Inbound/Outbound Customer Service Agent in Gauteng

Call/Contact Centre

Gauteng offers significant labour and salary savings



Salaries are over
70% CHEAPER
than the US source market



Salaries are over
68% CHEAPER
than the European source market



Salaries are over
64% CHEAPER
than the UK source market



Salaries are over
67% CHEAPER
than the Australia source market

Average Gauteng salaries



Call Centre Agent

ZAR	USD
R7 900	$425



Inbound Sales Agent

ZAR	USD
R7 000	$376



Outbound Sales Agent

ZAR	USD
R7 300	$392



Team Supervisor/Manager

ZAR	USD
R16 500	$887



Contact Centre Manager

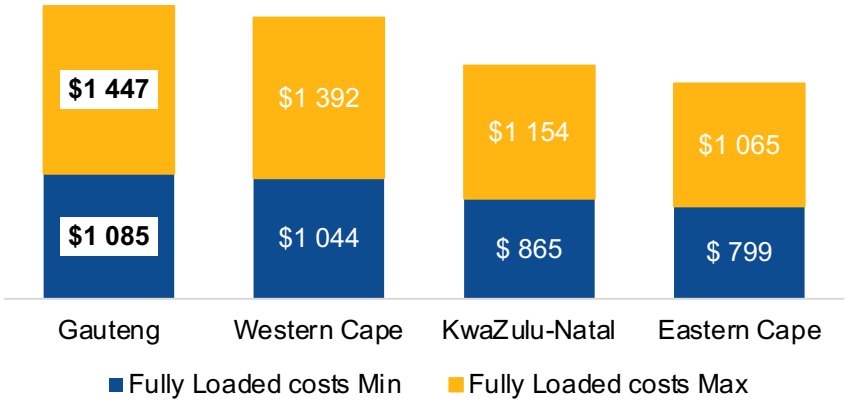
ZAR	USD
R38 000	$2 043

Sources: GBS World | Genesis GBS: 2023 Africa GBS Benchmarking and Market Report Data Bank

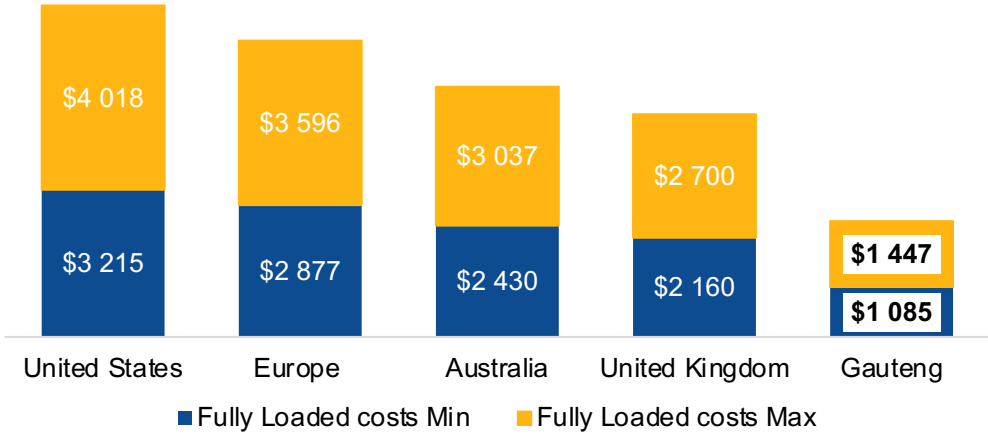
Call/Contact Centre

Fully loaded operating costs are very favourable in Gauteng

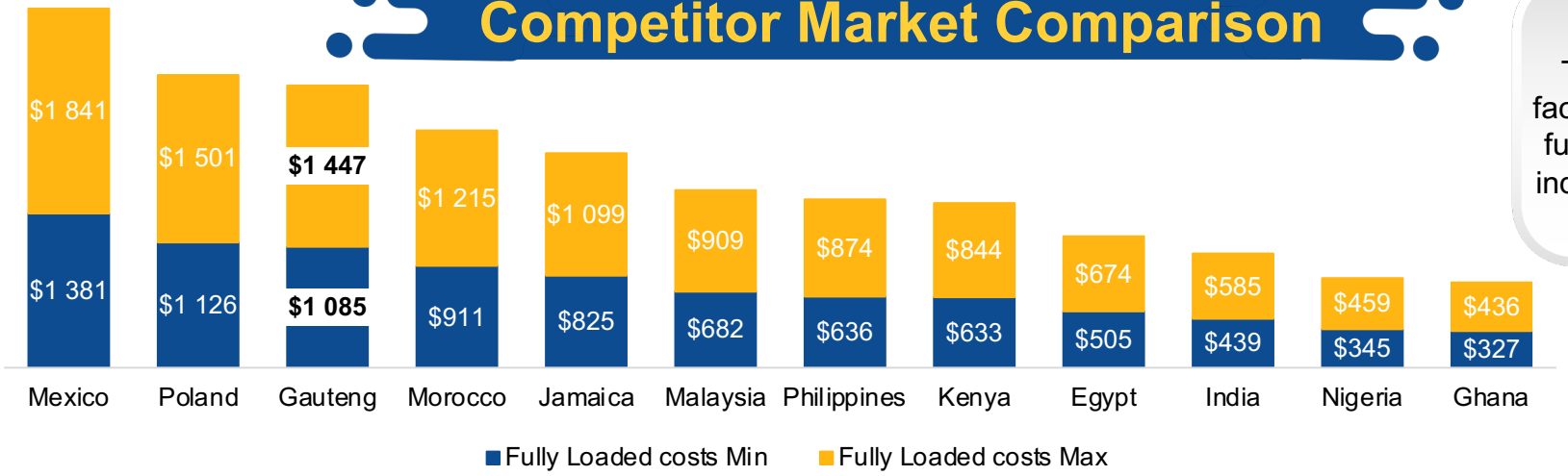
Provincial Comparison



Source Market Comparison



Competitor Market Comparison



The fully loaded costs comprises of the salary, IT, facilities, admin, operational management, operational functional and other operating costs. A South African industry-average mark-up is applied to the total costs.

Sources: GBS World | Genesis GBS: 2023 Africa GBS Benchmarking and Market Report Data Bank

Digital and ITO

Gauteng offers significant labour and salary savings



Salaries are over
67% CHEAPER
than the US source market



Salaries are over
54% CHEAPER
than the European source market



Salaries are over
50% CHEAPER
than the UK source market



Salaries are over
64% CHEAPER
than the Australia source market

Average Gauteng salaries



IT Help Deck Agent

ZAR	USD
R10 500	$565



Data Analyst

ZAR	USD
R25 500	$1 371



Software Developer/Programmer

ZAR	USD
R31 500	$1 694



IT Manager

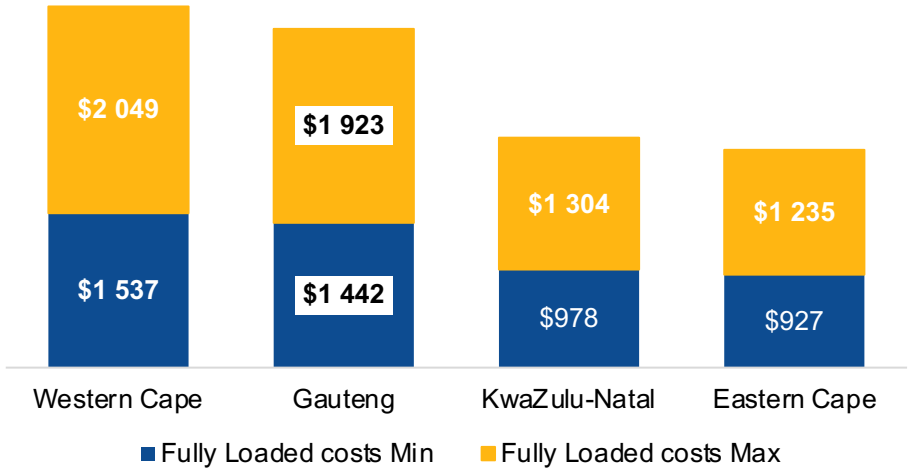
ZAR	USD
R52 500	$2 823

Sources: GBS World | Genesis GBS: 2023 Africa GBS Benchmarking and Market Report Data Bank

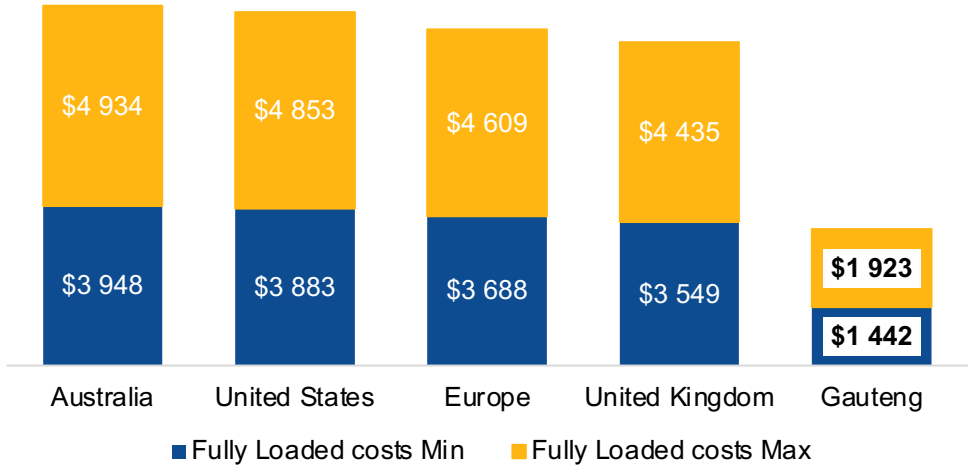
Digital and ITO

Fully loaded operating costs are very favourable in Gauteng

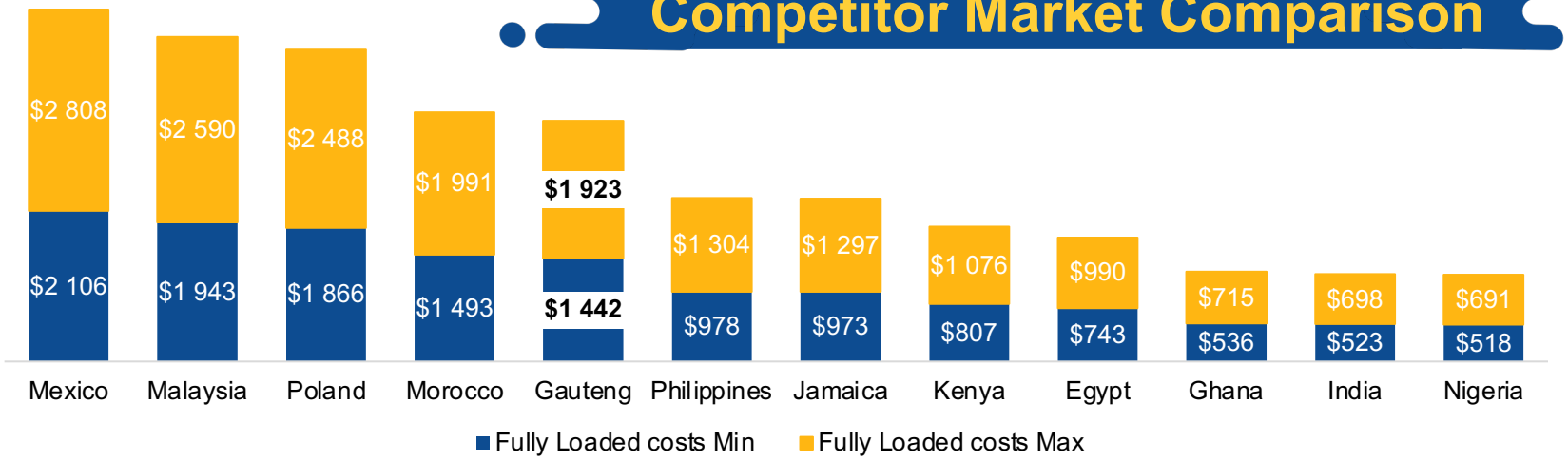
Provincial Comparison



Source Market Comparison



Competitor Market Comparison



Sources: GBS World | Genesis GBS: 2023 Africa GBS Benchmarking and Market Report Data Bank

Finance & Accounting and Back Office

Gauteng offers significant labour and salary savings



Salaries are over
70% CHEAPER
than the US source market



Salaries are over
62% CHEAPER
than the European source market



Salaries are over
59% CHEAPER
than the UK source market



Salaries are over
63% CHEAPER
than the Australia source market

Average Gauteng salaries



Accountant

ZAR R24 700 | **USD** $1 328



Finance Analyst

ZAR R25 500 | **USD** $1 371



Payroll Administrator Manager

ZAR R29 270 | **USD** $1 574



Back Office Processing Agent

ZAR R7 700 | **USD** $414



Claims/Administration Processing Agent

ZAR R9 000 | **USD** $484



Facilities Manager

ZAR R32 000 | **USD** $1 720

Sources: GBS World | Genesis GBS: 2023 Africa GBS Benchmarking and Market Report Data Bank

Legal and HR Management

Gauteng offers significant labour and salary savings



Salaries are
68% CHEAPER
than the US source market



Salaries are over
64% CHEAPER
than the European source market



Salaries are over
57% CHEAPER
than the UK source market



Salaries are over
60% CHEAPER
than the Australia source market

Average Gauteng salaries



Legal Contract Administrator

ZAR	USD
R12 695	$682



Paralegal

ZAR	USD
R15 451	$831



Legal Counsel

ZAR	USD
R73 500	$3 952



HR Officer

ZAR	USD
R20 926	$1 125



Recruitment Administration Manager

ZAR	USD
R20 500	$1 102



Trainer

ZAR	USD
R17 600	$946

Sources: GBS World | Genesis GBS: 2023 Africa GBS Benchmarking and Market Report Data Bank

Decent work, benefits and working hours

When comparing Gauteng's minimum wage and the average salary for an international contact centre agent, it is evident that BPO and ITO work presents decent work opportunities for job seekers in the province

Working times equate to 8 to 9 hours per day with rotating shifts to accommodate different time zones. For shift work, door-to-door transport is arranged for agents to get to and from work.

	Gauteng	South Africa	Ghana	Kenya	Nigeria	Morocco	Rwanda
Minimum Wage	$245	$245	$44.8	$107	$41	$263	$18.4
Average Salary for an International Contact Centre Agent	$425	$360	$330	$336	$425	$514	$199
% Difference	**73%**	**47%**	**86%**	**68%**	**90%**	**49%**	**91%**



Company Benefits

- Paid holidays
- Transport
- In-house canteens
- Pension, insurance contributions
- Performance awards



Career Development

- Skills development
- Skills transfer to in-demand industries



Learning on-the-Job

- Minimal experience required
- Soft skills and work-readiness training



Opportunities for Women

- Flexible work arrangements
- Low barriers to entry
- Women comprise over 64% of the GBS/BPO workforce

Sources: GBS World | Genesis GBS: 2023 Africa GBS Benchmarking and Market Report Data Bank



Sophisticated, niche domain skills in back office, HR and F&A

Sophisticated, niche domain skills in back office, HR and F&A

Top 3 F&A Services Delivered from Gauteng

1. Audit Services
2. Taxation Services
3. Financial Consulting

Top 3 Employee Lifecycle Management Services Delivered from Gauteng

1. Talent Acquisition
2. Development & Training
3. Change Management

Top 3 Back Office Services Delivered from Gauteng

1. Operations/ Administration Support
2. Reference Checks
3. Transaction Processing

Top 3 Vertical Industries Serviced by F&A Providers in Gauteng

1. BFSI
2. Technology
3. Retail

Top Back Office Channels Utilised by Gauteng Operators

1. Omnichannel Communications
2. Social Media
3. Email
4. Web Chat
5. Instant Messaging



2 242 (est.)

Total Actuarial Analysts in Gauteng

17 430 (est.)



Total Chartered Accountants (CAs) in Gauteng



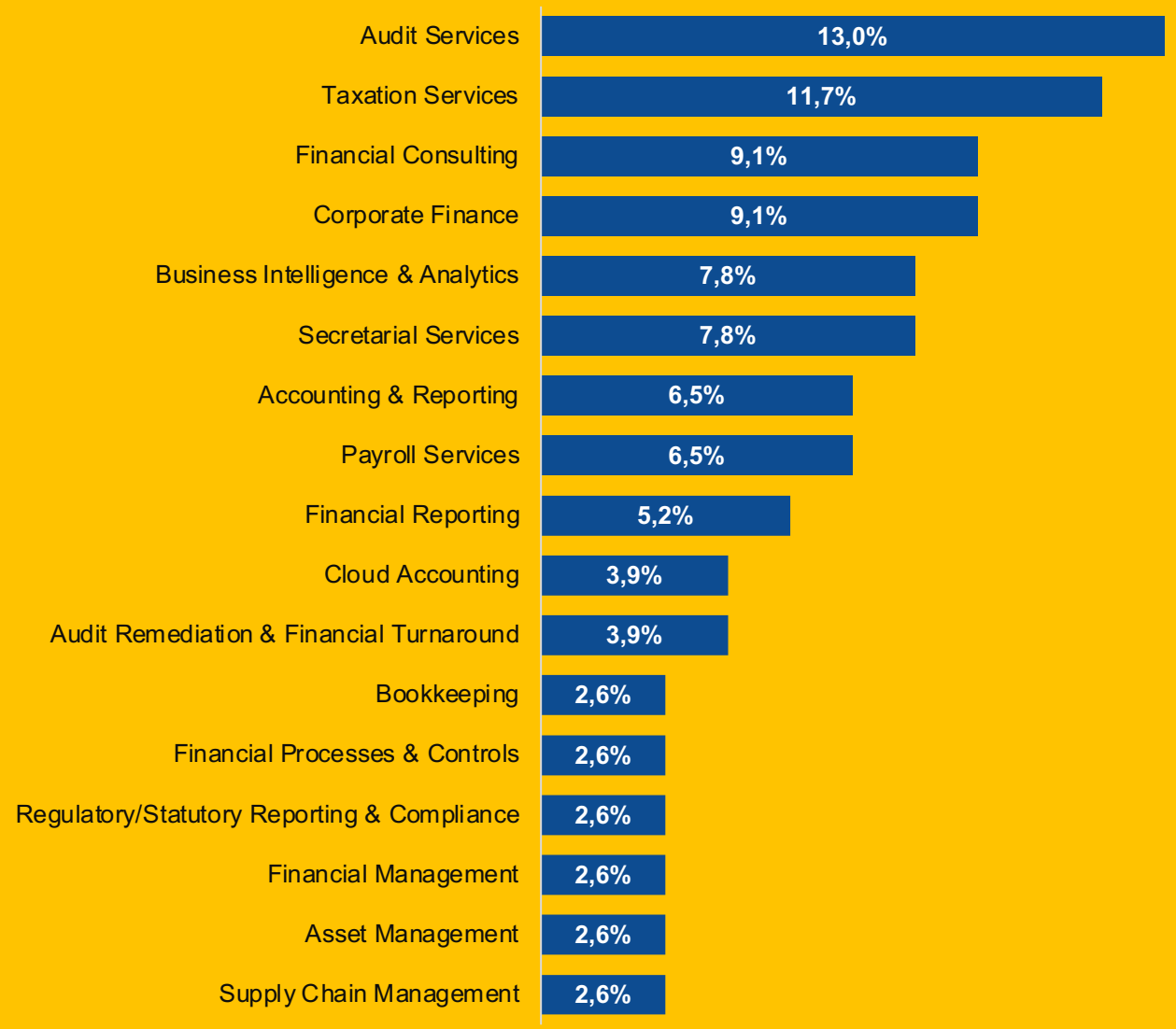
1 500 (est.)

Total Chartered Financial Analysts (CFAs) in Gauteng

Source: 2021/22 South Africa National GBS Quantification & Investment Report

World-renowned delivery centres for finance & accounting (F&A)

Top Gauteng F&A Services Delivered to the Domestic and International Markets



Source: GBS.World | Genesis GBS

Top 10 Industries Serviced



Established Gauteng F&A Providers (#not exhaustive)

KOPANO INCORPORATED CHARTERED ACCOUNTANTS (SA) & REGISTERED AUDITORS

adept advisory

AUDITOR-GENERAL SOUTH AFRICA Auditing to build public confidence

mazars

MOORE OUTSOURCEHUB

PKF

SNG Grant Thornton

High availability of qualified talent including CAs, CFAs and actuaries

2 242 (est.)
Total **Actuarial Analysts** in Gauteng

17 430 (est.)
Total **Chartered Accountants (CAs)** in Gauteng

1 500 (est.)
Total **Chartered Financial Analysts (CFAs)** in Gauteng

Sources: GBS.World | Genesis GBS; LinkedIn

Other Multi-talented Knowledge Workers in Gauteng



4 900 (est.)
Professional Accountants



1 655 (est.)
Chartered Public Accountants



3 100 (est.)
Annual Legal Graduates



5 483 (est.)
Annual Master Degree Graduates



4 300 (est.)
Chartered Financial Planners



21 912 (est.)
Annual Science, Engineering and Technology Graduates

Finance & Accounting Case Study: Mastercard and SoluGrowth

SoluGrowth operates one of the three Global Business Services Centres (GBSC) for Mastercard. Commencing in 2003, the partnership has grown into a renowned South African shared services success story.

2003 — Inception

7

MEA, UK
End to end accounting, Payroll, Fixed Assets, Vendor Maintenance

2006 — 1st Renewal

21

MEA, UK, Europe, US
Europe Vendor Maintenance, TS, Helpdesk, Europe AR/collections, Global Coordination, FSD

2012 — GBSC Inception

34

US, MEA, UK, Europe
Global TS, Global Vendor Maintenance, Global AR/collections, Billing Services

2018 — GBSC Partner

60

Global, US, MEA, APAC
Special projects, RPA & Automation, Dashboarding & Reporting, T&E audits and Fraud analytics

2019 — SoluGrowth

60

Global – ALL
M&A Support, Continuous Improvements, Level 2 Inquiry management

2023 — Expansion

160+

3 New verticals supported; Roles moved from other delivery centre(s) to SA as preferred provider; AS, NHS, BS, LFI, RAS, CS & M&A support

Accounting Services

- Expense Accounting
- Consolidation
- Cash
- Settlement
- Collateral
- Bank Admin
- Revenue Accounting (Gross & Net)
- Rebates & Incentives
- Global Fixed Assets
- Statutory Accounting/Taxation (MEA)
- Commission calculations (Internal & External)

Billing Services/AR

Accounts Receivable
- Collections
- AR System, admin & query support
- AR Accounting

Billing Services
- Support creation of Global COE
- Complex Manual Billings: M&A; Legacy Products, large data sets and multiple tools/software supported

People & Capability

- Global interview scheduling
- Tier 1 Helpdesk support
- Background verifications
- Offer letters
- Regional recruitment drive support

Law, Franchise, Integrity; Financial Systems

- Customer Refresh
- Ironclad system management and contract migration
- I-Manage system management
- Administration of licenses, user account setups
- Full application access provisioning
- Quarterly access and SOD reviews
- Full level helpdesk support
- SME: Noetix, Alteryx, Walkme

Transaction Services

- Accounts Payable
- Payments
- Global Vendor Master Management
- Purchase Order / Purchase Requisition Management

Travel & Expenses
- Compliance/Fraud
- Daily Operations
- Receipt Audits

Source: SoluGrowth

Finance & Accounting Case Study: Mastercard and SoluGrowth

The partnership betwen SoluGrowth and Mastercard to operate one of the three Global Business Services Centres (GBSC) has led to numerous benefits

People

- 160+ dedicated resources across all verticals
- Cultural affinity / Collaboration
- Impact Sourcing
- Diverse team (DEI)
- Low staff attrition
- Cross-utilization of resources across multiple verticals
- 400+ years of collective Mastercard experience

CPIs

- Savings through CPIs (identified, supported, led)
- Dedicated Senior Manager driving CPIs
- Innovation Hub Support: Senior resource utilized & costs covered by SG
- Multiple tools & bots created (many still in use)
- More than 60 automation initiatives implemented to date

Flexibility

- Special projects
- Coverage of tasks while client recruiting
- Coverage on IND/US Public holidays
- Multiple time zone coverage / shifts
- Ability to contract for % of a resource
- Fast recruitment turnaround times
- Parental leave cover

Cost Efficiency

- Competitive pricing
- Tailored rate cards to facilitate budgeting & forecasting
- Rate card unchanged since 2017
- Contingencies @ 10-15% included in rates
- Management time % for oversight included in rates
- New scope absorbed through efficiencies added

Business Continuity

- Location risk mitigation
- Tested successful BC plan throughout Covid years
- WFH / Hybrid model
- Multiple delivery locations in SA as well as addition of Egypt office
- Addition of US office in 2024 (St. Louis, MO)

Source: SoluGrowth

Proficient HR, recruitment, and learning services support

Top Gauteng Employee Lifecycle Management Capabilities Delivered to the Domestic and International Market

- 13.8% — Talent Acquisition & Onboarding
- 12.3% — Development & Training
- 10.8% — Change Management
- 9.2% — Diversity, Equity & Inclusion (DEI)
- 9.2% — Performance Management
- 9.2% — Employee Relations
- 9.2% — Organisational Design
- 6.2% — HR Analytics
- 6.2% — Employee Wellbeing
- 6.2% — Leadership Development
- 4.6% — Conflict & Mediation
- 3.1% — Employee Surveys

Sources: GBS.World | Genesis GBS

Strong digital back-office capabilities in web chat, social media and instant messaging

Top Back Office Channels Utilised by Gauteng Operators



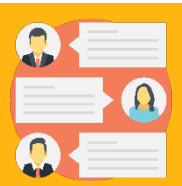
14.3%
Omnichannel Communications



14.3%
Social Media



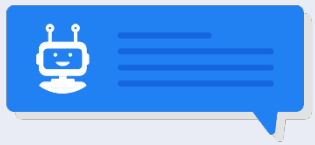
14.3%
Email



11.9%
Web Chat



11.9%
Instant Messaging



7.1%
Chat Bots



7.1%
Mobile Smartphone Self Service



7.1%
Video Chat



4.8%
Predictive IVR Routing



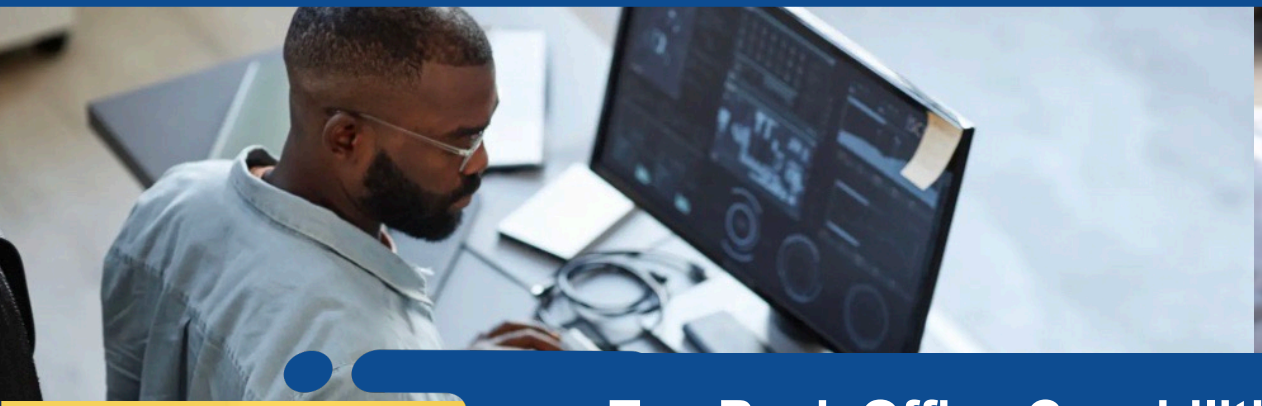
4.8%
Intelligent Assistants/Agents



2.4%
Speech Self Service

Sources: GBS.World | Genesis GBS

Proven capabilities in demand-driven back-office processing services





Top Back Office Capabilities Delivered from Gauteng

- **36%** Operations/ Administration Support
- **11%** Reference Checks
- **11%** Transaction Processing
- **10%** Loan Initiation/ Processing
- **8%** Order Fulfilment
- **6%** Data Management
- **4%** Internal Sales Support
- **4%** Applications
- **3%** Data Entry
- **3%** Document and Case Management
- **2%** Complaint Closures

Source: GBS.World | Genesis GBS; 2021/22 South Africa National GBS Quantification & Investment Report



Internationally respected legal and credit lifecycle management

BPESA Business Process Enabling South Africa

the dtic Department: Trade, Industry and Competition REPUBLIC OF SOUTH AFRICA

investSA ONE STOP SHOP

GAUTENG PROVINCE ECONOMIC DEVELOPMENT REPUBLIC OF SOUTH AFRICA

GGDA GAUTENG GROWTH AND DEVELOPMENT AGENCY

G:ENESIS GLOBAL BUSINESS SERVICES

Internationally respected legal and credit lifecycle management

Top 3 Debt Recovery Services Delivered from

1. B2C Collections
2. Call/Contact Centre Services
3. B2B Collections

78%

Percentage of The Best Lawyers in South Africa™ Award Recipients Located in Gauteng



26/50

Total Number of Gauteng-based Law Firms in the ALM Africa Top 50 Law Firms

12/50

Number of Homegrown Gauteng Law Firms in the ALM Africa Top 50 Law Firms

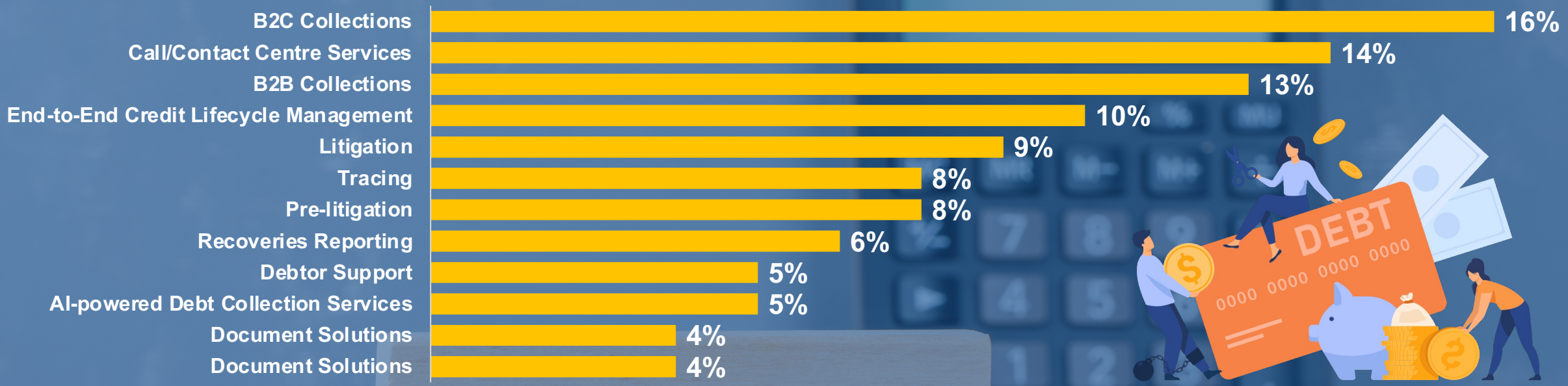


Top Automated and AI-enabled Recovery Solutions and Technology Utilised in Gauteng

- Compliance Automation
- Predictive Analytics
- Call Transcription
- Call Analyses
- Conversational AI & Chatbots

Established debt recovery and credit lifecycle management centres

Gauteng Debt Recovery Capabilities



Established Gauteng Debt Recovery Providers (#not exhaustive)

ADRS DIVERSIFIED SERVICES
BREDELL FERREIRA
CSS TAILOR-MADE SOLUTIONS Powered by iSON
NETWORK DEBT RECOVERY WeTargetDebt
N LEGAL RECOVERIES WE RECOVER WITH NO FEAR
NUTUN Digital Business Services
debt tec
HN COLLECTION SERVICES (PTY) LTD
MINT COLLECTIONS
Sherlock
SM INC.
SWIFT
VVM

Source: GBS.World | Genesis GBS

Respected attorneys, lawyers and legal specialists



The Best Lawyers in South Africa™ Awards for 2024

All 11 Law Firms that Received **"Law Firm of the Year"** Awards are **Gauteng-based**

6 Number of **Homegrown Gauteng Law Firms** Receiving "Law Firm of the Year" Awards

5 Number of **International Law Firms with Gauteng Offices** Receiving "Law Firm of the Year" Awards

CDH CLIFFE DEKKER HOFMEYR

CLYDE&CO

ENS africa

WERKSMANS ATTORNEYS

NORTONS INC

NORTON ROSE FULBRIGHT

Pinsent Masons

HERBERT SMITH FREEHILLS

FASKEN

WEBBER WENTZEL in alliance with > Linklaters

spoor • fisher patents • trade marks • copyright

Source: Best Lawyers

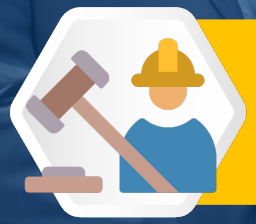
Respected attorneys, lawyers and legal specialists



78%

Percentage of **The Best Lawyers in South Africa™** Award Recipients **Located in Gauteng**

Practice Areas Receiving the Highest Number of Awards



WEBBER WENTZEL in alliance with > Linklaters

Corporate Law
Mining Law



NORTON ROSE FULBRIGHT

Litigation



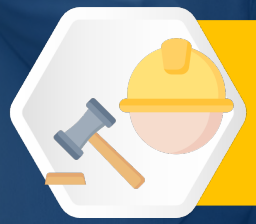
WERKSMANS ATTORNEYS

Mergers & Acquisitions



spoor • fisher
patents • trade marks • copyright

Intellectual Property Law



Pinsent Masons

Construction Law



NORTONS INC

Competition/ Antitrust Law



CDH
CLIFFE DEKKER HOFMEYR

Real Estate Law



FASKEN

Labour & Employment Law



CLYDE&CO

Insurance Law



HERBERT SMITH FREEHILLS

Project Finance & Development Practice



ENS africa

Banking & Finance Law
Tax Law

Source: Best Lawyers

Recognised service proficiency in globally required ALS services



26/50	**Total Number of Gauteng-based Law Firms in the ALM Africa Top 50 Law Firms**
12/50	Number of Homegrown Gauteng Law Firms in the **ALM Africa Top 50 Law Firms**
3/50	**Number of South African Law Firms** with **Local Offices in Gauteng** in the **ALM Africa Top 50 Law Firms**
11/50	**Number of International Law Firms in the ALM Africa Top 50 Law Firms that have Offices in Gauteng**

Homegrown Gauteng Law Firms in the ALM Africa Top 50

Adams & Adams
BARNARD
BOWMANS
CDH CLIFFE DEKKER HOFMEYR
Cognia
ENS africa
WERKSMANS ATTORNEYS
STBB | SMITH TABATA BUCHANAN BOYES
Fluxmans
LAWTONS AFRICA
KISCH IP
spoor • fisher patents • trade marks • copyright
WEBBER WENTZEL in alliance with > Linklaters

Sources: Law.com; Organisation Websites; LinkedIn

Recognised service proficiency in globally required ALS services

African Legal Awards Winners – Gauteng Law Firms

WEBBER WENTZEL in alliance with > Linklaters
Competition and Regulatory Team of the Year

BOWMANS

WEBBER WENTZEL in alliance with > Linklaters
Employment Law Team of the Year

Adams & Adams
IP Team of the Year

WEBBER WENTZEL in alliance with > Linklaters
Transportation and Infrastructure Team of the Year

Other Notable National and Global Awards Received by South African Law Firms

BOWMANS

Chambers Africa Awards, 2023 - South Africa Law Firm of the Year

CDH
CLIFFE DEKKER HOFMEYR

Recognised as one of South Africa's top M&A legal advisers, **winning the DealMakers Listed M&A Deal Flow award for the 13th time in 14 years in 2022**

Source: Organisation Websites

WERKSMANS ATTORNEYS

Chambers and Partners
Dispute Resolution: Band 1 | 2023
Restructuring & Insolvency: Band 1 | 2023

IFLR 1000
Tier 2 Ranking for Banking, Capital Markets (Debt, Equity), Project Development (Infrastructure, Energy, Mining) and Project Finance

Legal 500
Dispute Resolution - Tier 1

ITR World Tax
General Corporate Tax | Tier 2
Transactional Tax I Tier 2

Adams & Adams

Consistently Ranked as a Global Leader in IP Law

Chambers and Partners
Band 1 Ranking – Intellectual Property Law Firm | 2016 – 2023
Who's Who Legal
Patents – Tier 1 Ranking | 2018 – 2022
World IP Survey
Copyright – Tier 1 Ranking | 2016 – 2022
Patents – Tier 1 Ranking | 2021 – 2022
Trade Mark Practice – Tier 1 Ranking | 2018 – 2023
WTR 1000
Leading Trade Mark Professionals | 2018 – 2022
Recommended Firm – Gold | 2021 – 2023
WIPR Diversity
Recognised Firm | 2020 – 2023

spoor • fisher
patents • trade marks • copyright

WIPR Leaders
Several lawyers recognised as IP leaders in the WIPR 2023 Directory

Global IP Awards
Patent Firm of the Year. 2023

Automated and AI-enabled recovery solutions and technology



Compliance Automation

Automation tools are Used To ensure adherence to debt collection laws and regulations, which monitor and record all interactions with debtors to maintain compliance



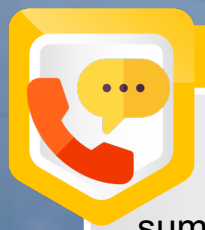
Predictive Analytics

Leveraging machine learning and financial trends, AI is used to make predictions on payment behaviours



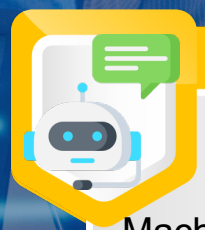
Call Transcription

Recordings are automatically transformed into text, which can be used for documentation, compliance and clarity



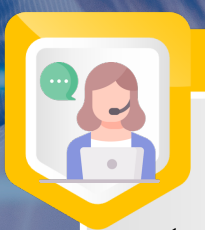
Call Analyses

Analysis of call transcriptions to provide summaries and insights, eliminating user-biased interpretations



Conversational AI & Chatbots

Powered by Natural Language Processing and Machine Learning, these tools are used to engage customers in personalised conversations, ensuring consistent engagement



Optimized Contact Strategies

AI is used to determine the best times and channels for contacting debtors by analysing historical data



Automated Credit Scorecards

Extracts debtor's financial data to determine credit scorecards



Natural Language Processing (NLP)

Extracts valuable insights from customer engagements that can be used for analysis, campaign strategy and customer service tailoring.



Automated Legal File Production and Management

Automates legal file production and management, enhancing efficiency and accuracy in legal operations, enabling effective case management and optimised workflows for clients.

Source: Organisation Websites



Highly advanced KPO and ITO hubs with intensive digital delivery capabilities

BPESA Business Process Enabling South Africa

the dtic Department: Trade, Industry and Competition REPUBLIC OF SOUTH AFRICA

investSA ONE STOP SHOP

GAUTENG PROVINCE ECONOMIC DEVELOPMENT REPUBLIC OF SOUTH AFRICA

GGDA GAUTENG GROWTH AND DEVELOPMENT AGENCY

G:ENESIS GLOBAL BUSINESS SERVICES

Highly advanced KPO and ITO hubs with intensive digital delivery capabilities

Top 3 Medical Research Services Delivered from Gauteng

1. Clinical Research
2. Regulatory Affairs
3. Data Management

Top 3 Research Services Delivered from Gauteng

1. Customer Experience (CX) Research
2. Brand Research
3. Market Analysis

Top 3 Data Analytics Services Delivered from Gauteng

1. Contact Centre Analytics (Desktop & Voice)
2. Behavioural Analytics
3. Big Data Analytics

Top 3 Software, Platform & App Development Services Delivered from Gauteng

1. Custom software Development
2. Mobile App Development
3. Web Design & Development

Top Vertical Industries Serviced by Gauteng-based **Prescriptive Analytics** Providers

- BFSI
- Manufacturing
- Mining
- Public Sector
- Telecommunications



232 (est.)

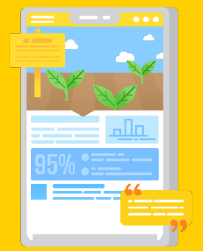
Number of Software, Platform and App Development Providers in Gauteng

Highly advanced KPO and ITO hubs with intensive digital delivery capabilities

- Video Annotation
- Audio Transcription & Translation
- Text Classification
- Image Annotation

Top Gauteng Data Annotation Services Delivered to Domestic and International Markets

Vertical Industries Serviced by Gauteng-based Data Annotation Providers



AgriTech



BFSI



Construction



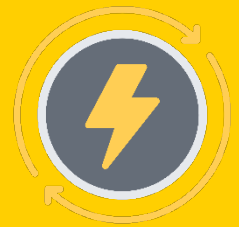
Education



Healthcare



Media & entertainment



Utilities & Energy

Highly advanced KPO and ITO hubs with intensive digital delivery capabilities

The future of data annotation and labelling looks set to grow with AI

The future of data labelling holds immense potential to transform various industries, empowering them to leverage AI and machine learning to their fullest potential

With advancements such as active learning, semi-supervised labelling, and the integration of human expertise with automated systems, **data labelling will become more efficient, cost-effective and scalable**

Emerging technologies like computer vision and natural language processing **will enhance the accuracy and speed of labelling tasks**, opening doors to new possibilities

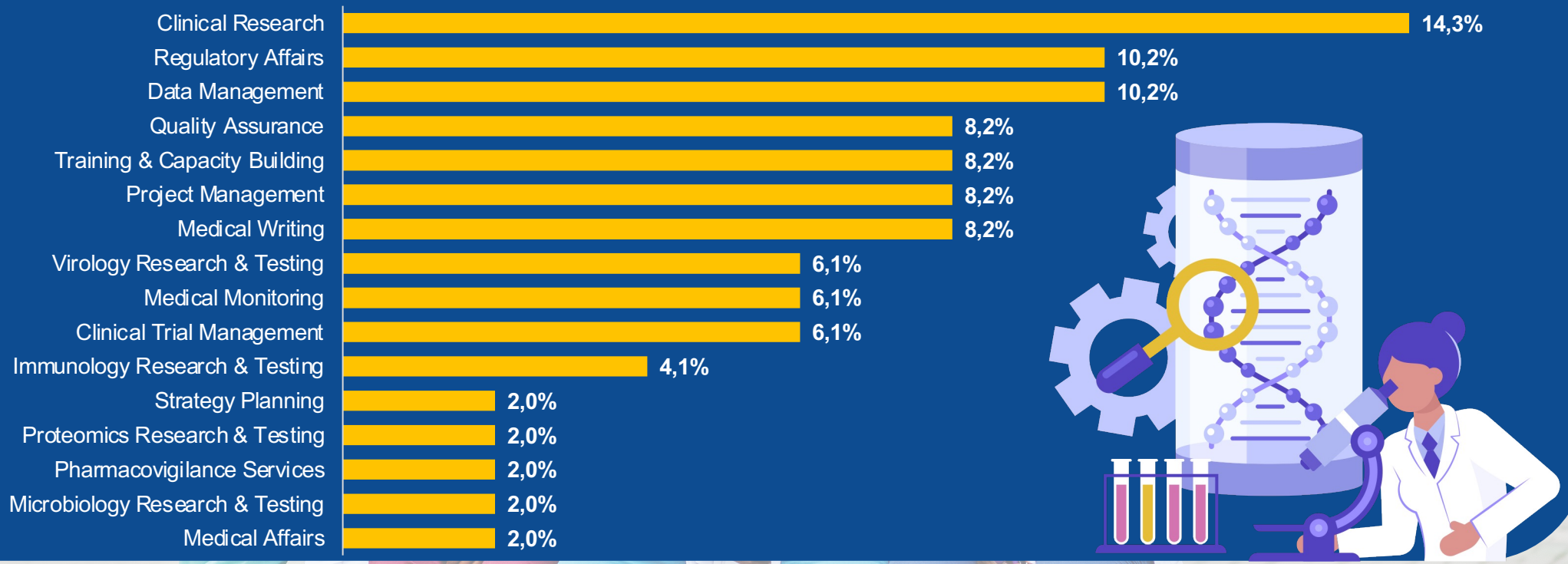




In 2024, the demand for data annotation and labelling services has surged dramatically, driven by the exponential growth of AI and machine learning applications across industries

Proficient medical KPO capabilities

Top Gauteng Medical Research Capabilities



Established Gauteng Medical Research Providers

(#not exhaustive)

acro african clinical research organisation

Newtown Clinical Research Centre

Setshaba Research Centre

SGS

On

saMRC advancinglife

SYNEXUS clinical research

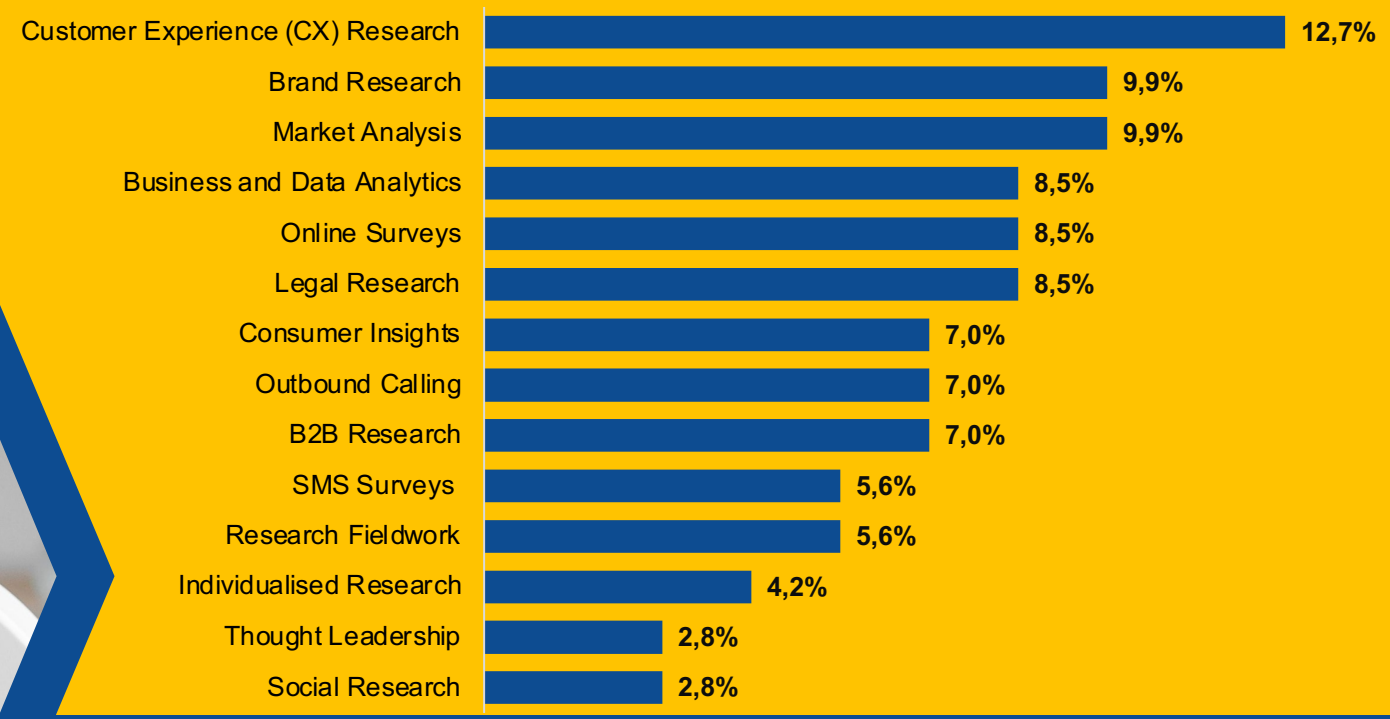
TASK

Source: GBS.World | Genesis GBS

Proficient research KPO capabilities



Top Gauteng Research Capabilities



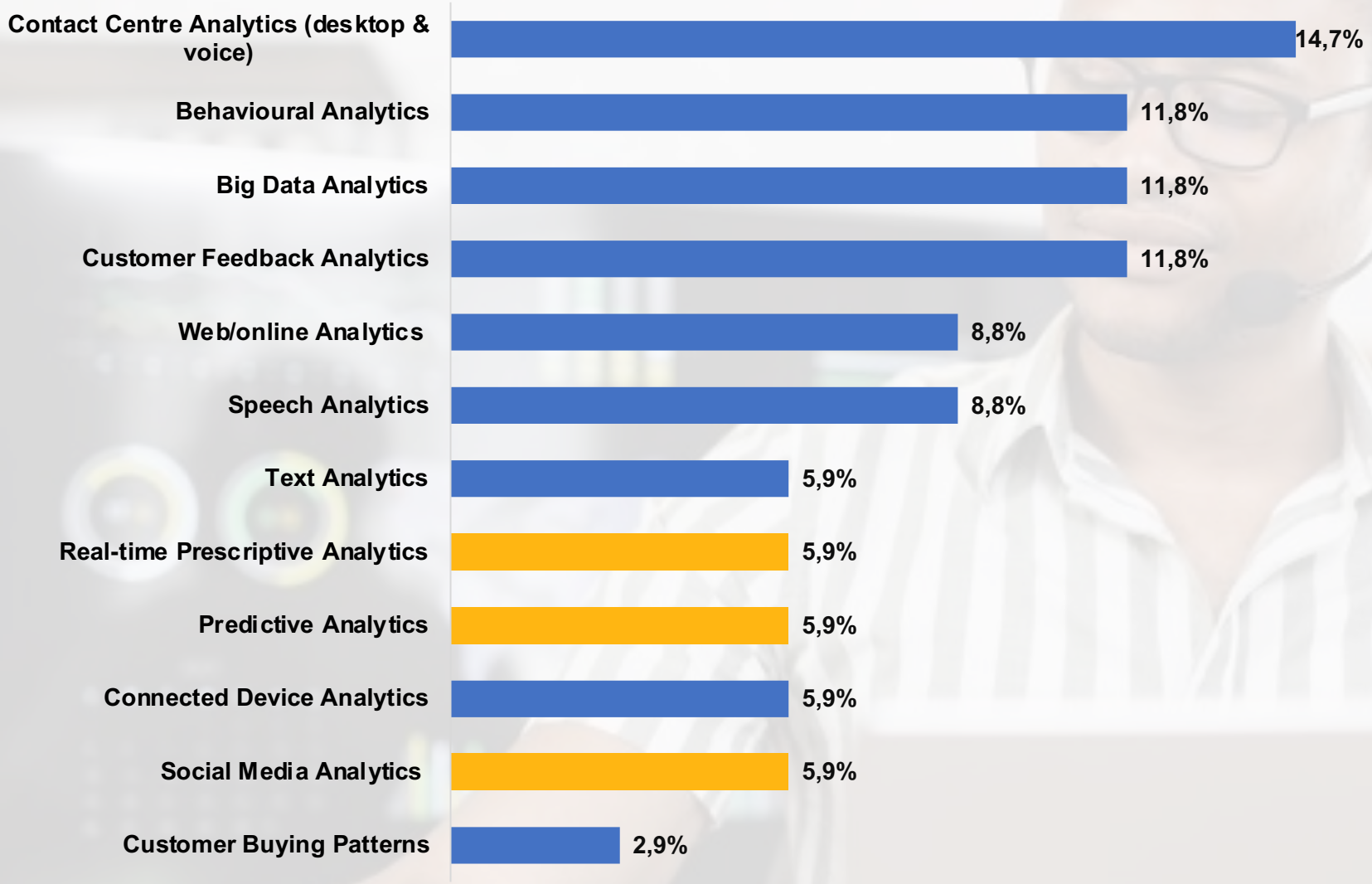
Established Gauteng Research Providers (#not exhaustive)

alt.
CONSULTA
G:ENESIS UNLOCKING VALUE
KLA
INSIGHT SURVEY B2B Market Research
KANTAR
Livingfacts Cost effective data. Priceless insights.
PLUS 94 RESEARCH
LexisNexis
insiTEQ ASK MORE KNOW MORE DO MORE
VIBRAND RESEARCH
WNS
RESEARCH 24/7

Source: GBS.World | Genesis GBS

Proficient analytics KPO capabilities and availability of predictive, prescriptive & social media analytics competencies

Top Gauteng Data Analytics Capabilities



Established Gauteng Data Analytics Providers (#not exhaustive)

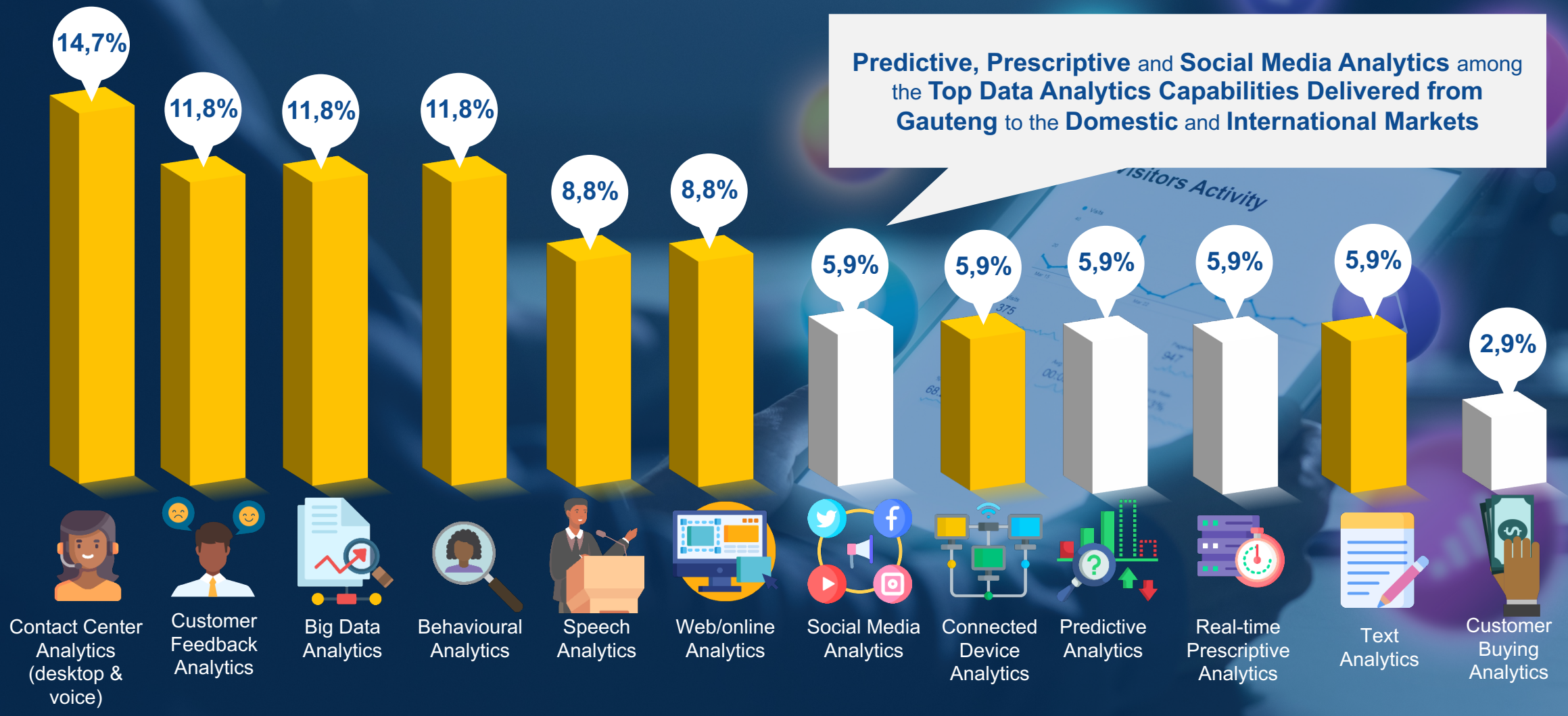
accenture
AG.
braintree
Masters of Microsoft
Connect iQ
THE SCIENCE OF IMPROVING PERFORMANCE
DRIP DATA
EDGE ANALYTICS
Risk Analytics redefined
EXPLORE DATA SCIENCE ACADEMY
genii
iOCO
Proudly EOH
SIVOXI®
BCX
ENTERPRISEWORX
we think code_
INTELEQT
Deloitte.

Sources: GBS.World | Genesis GBS; 2021/22 South Africa National GBS Quantification & Investment Report

Availability of predictive, prescriptive and social media analytics competenc

Top Gauteng Data Analytics Capabilities

Predictive, Prescriptive and **Social Media Analytics** among the **Top Data Analytics Capabilities Delivered from Gauteng** to the **Domestic** and **International Markets**



Sources: GBS.World | Genesis GBS; 2021/22 South Africa National GBS Quantification & Investment Report

Availability of predictive, prescriptive and social media analytics competencies

Top Predictive Analytics Models used by Gauteng-based Providers

- Classification
- Clustering
- Forecast
- Outliers
- Time Series



Top Vertical Industries Serviced by Gauteng-based Prescriptive Analytics Providers

- BFSI
- Manufacturing
- Mining
- Public Sector
- Telecommunications



Top Social Media Marketing Services Delivered from Gauteng-based Providers

- Advert Tracking
- Consumer Intelligence
- Data & API Integration
- Media Intelligence
- Sales Intelligence
- Social Listening & Analytics
- Social Media Tracking



Gauteng Providers offering Predictive, Prescriptive and Social Media Analytics (#not exhaustive)

BLUEGOAT DIGITAL MARKETING AGENCY

In2IT Technologies Infinite Possibilities

iOCO Proudly EOH

LIVEX

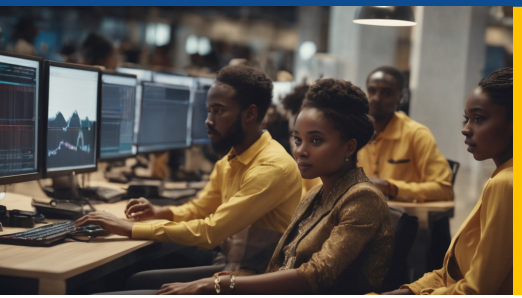
Meltwater

newsclip

novus group

Sources: GBS.World | Genesis GBS; 2021/22 South Africa National GBS Quantification & Investment Report

Expanding network of software, platform and app development service providers



232 (est.) Number of Software, Platform and App Development Providers in Gauteng



Top 10 Software, Platform and App Development Capabilities in Gauteng

- **30.4%** Custom Software Development
- **29.7%** Mobile App Development
- **17.1%** Web Design & Development
- **7.8%** UI/UX Design
- **5.2%** eCommerce Development
- **2.9%** Application Testing
- **2.6%** AI Development
- **2.2%** Application Management & Support
- **1.4%** Blockchain
- **0.8%** Enterprise App Modernisation

Established Gauteng Software, Platform and App Development Providers

(#not exhaustive)

Bluegrass Digital · CUBEZOO · HEEFELE SOFTWARE · KB CONSULTING · INVENTIVE SOLUTIONS · Liorra. · NETGEN CUSTOM SOFTWARE DEVELOPMENT · MELSOFT · SIVOXI® · Softserve · SOVTECH · ValueLabs · warp

Sources: Clutch; GlassDoor

Burgeoning automation capabilities, AI and enabling technology

Top Automation Capabilities

- Automated Business Intelligence & Analytics
- Artificial Intelligence (AI) Automation
- Asset, Fleet & Vehicle Tracking & Recovery
- Advanced Analytics
- Business Process Automation (BPA)
- Customer Relationship Management (CRM) Automation
- Data Management
- Data Engineering
- Data Visualisation
- DevOps & Cloud Enablement
- Document Automation
- Human Resources (HR) Automation
- Industrial Automation Solutions
- Intelligent Process Automation
- IT Process Automation (ITPA)
- Machine Learning
- Neural Networks
- OEM Telematics
- Workflow Automation
- Workforce Management

Top Artificial Intelligence Capabilities

- AI Consulting
- AI Data Analytics
- Analytics Web Applications
- Automated Data Processing
- Automatic Speech Recognition
- Chatbots & Virtual Assistants
- Conversational AI
- Credit Profile Automation
- Deep Learning
- Fraud Detection
- Generative AI Development
- Natural Language Processing
- Prescriptive Algorithms
- Process Optimisation
- Robotic Process Automation (RPA)
- Search & Recommendation Algorithms
- Text-to-Speech
- Visual Analysis Development

Top Enabling Technologies

- Access Networks
- Industrial Internet of Things (IoT) Devices
  - Warehousing
  - Manufacturing
  - Logistics
- Cloud Computing
- Custom Application Development
- Digital Transformation/Intelligent Systems Upgrading
- Edge-as-a-Service (EaaS)
- Embedded Integration
- Enterprise Application Solutions
- Healthcare Applications
- Human Capital Management
- Intelligent Data Networks
- IoT Development
- Multcloud-as-a-Service (MCaaS)
- Network-as-a-Service
- Unified Communication and Collaboration

Notable delivery of data annotation services, leveraging the province's digital talent ensuring accuracy and efficiency

Gauteng Data Annotation Services Delivered to Domestic and International Markets

- Image Annotation
- Text Classification
- Audio Transcription & Translation
- Video Annotation



21 912 (est.)

Annual Science, Engineering and Technology Graduates

Gauteng boasts a large, skilled graduate pool that can be trained in data annotation methodologies to deliver scalable data annotation services



Security

GDPR

South Africa POPI Act

Data security is paramount among Gauteng service providers, with stringent national and international measures in place to protect the confidentiality and integrity of annotated data

Source: GBS.World | Genesis GBS; Department of Higher Education and Training 2021 Statistics on Post-school education and Training in South Africa; Gauteng.net

Notable delivery of data annotation services, leveraging the province's digital talent ensuring accuracy and efficiency

Industries Serviced





AgriTech



BFSI



Construction



Education



Healthcare



Media & Entertainment



Utilities & Energy

Sources: GBS.World | Genesis GBS; Organisation Websites

Notable delivery of data annotation services, leveraging the province's digital talent ensuring accuracy and efficiency







Company case study I:

Challenge

A prominent South African AgriTech Company had approximately 381,000 acres of aerial data for processing

They sought a local partner, Enlabeler, capable of swiftly delivering labelled and annotated aerial imagery.

In line with their commitment to supporting local farmers and communities, they sought collaboration with Enlabeler, an organisation dedicated to making a positive impact within the local community.

Solution

Their team achieved an impressive 95% turnaround time, processing aerial data within 24 hours of intake.

Enlabeler's task involved accurately detecting objects and agricultural segments to assess yield and estimate crop production.

As part of Enlabeler's mission to enhance Africa's digital talent pool, they accessed previously untapped talent, creating job opportunities for 40 unemployed youth

Source: Enlabeler

Gauteng and South Africa FinTech

US$2 Billion

South Africa FinTech Market Size in 2022

US$26 Billion

South Africa FinTech Market Size in 2030, Growing by 1 200% between 2022 and 2030

40%

South Africa's Share in Africa's Fintech Revenue

1 231

Number of FinTech Start-ups in South Africa, Accounting 1/4 of Africa's FinTech Start-ups

36,6 Million

Estimated Number of FinTech Users in South Africa out of Africa's 91 Million FinTech Users in 2023

adumo online · Bank Zero be the change · Entersekt · FinChatBot · InvestSure · JUMO · Lulalend · Naked · PAYGATE A DPO Company · Pineapple · Tyme · VALR · YOCO · ZOONA LET'S MAKE IT REAL

Gauteng and South Africa EdTech

US$763 Million

South Africa EdTech Market Size in 2022

US$2,1 Billion

South Africa EdTech Market Size in 2030, Growing by **175%** between 2022 and 2030

431

Number of EdTech Start-ups in South Africa

66%

Portion of Edtech Cohorts in South Africa are 6 Years Old and Younger

60.4%

Pre-K12 and K12 EdTech Segment

cognician digemy DIGITAL FRONTIERS INSTITUTE eduze enko education foondamate G;rlCode. HyperionDev Lightbulb EDTECH SIYAVULA TECHNOLOGY-POWERED LEARNING Snapplify.com EDUCATION Syafunda We are learning watobe

Highly advanced KPO and ITO hubs with intensive digital delivery capabilities
Decentralised finance

Regular consumers need to deal with various financial middlemen to get access to everything from lending and borrowing to trading and investing.

DeFi challenges this centralised financial system by disempowering middlemen and gatekeepers and empowering everyday people via peer-to-peer exchanges

Gauteng is the leading **financial nerve centre** and manufacturing hub of South Africa with a contribution of 35% to the country's GDP

The world of finance is experiencing a significant transformation with the emergence of decentralised finance, or DeFi.

Gauteng, a region with such a vibrant financial landscape, is poised to benefit from this revolution

Gauteng can enhance service delivery through decentralisation

Fiscal decentralisation can **generate gains in financing, efficiency and quality** by devolving resources and decision-making powers to subnational governments for the delivery of services

Decentralized finance **offers financial instruments without relying on intermediaries** such as brokerages, exchanges, or banks by using smart contracts on a blockchain

Gauteng's attributes as a global financial centre support initiatives to democratise finance with a focus on financially excluded communities, individuals and SMEs and the associated inhibitors facing public finance





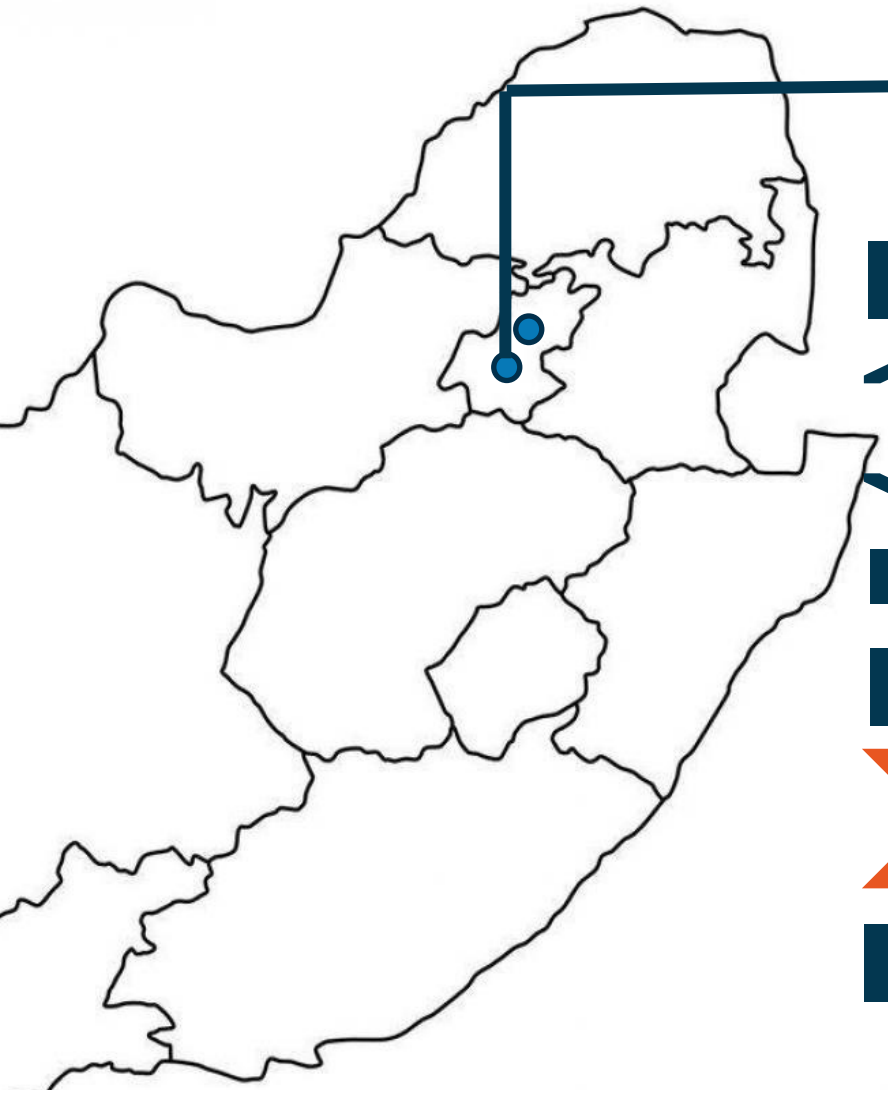








As the Economic Capital, Johannesburg is a Burgeoning Hub for GBS Delivery



JOHANNESBURG

Leader in Vertical IT Capabilities

Sector Focus

- Agriculture
- Digital
- eCommerce
- Education
- Health
- ICT Media
- Professional Services

Areas of Expertise

4IT Technology | Animation | Android, iOS & Web Solutions | Application Development | Cloud Technologies | Coding | Software Development

Areas of Expertise

Johannesburg is the economic capital of South Africa

10 000+ annual engineering, science and technology and mathematics graduates

Tshwane is a Cyber and Knowledge Economy Hub for IT-Enabled Business Processing



TSHWANE/PRETORIA

South Africa's Research & Science Capital

Sector Focus

- Bioscience
- ICT
- Green Economy

Areas of Expertise

- Cloud Technology
- Data Science
- Java / C#
- SAP Solutions
- UI/UX Design

Areas of Expertise

90% of research & development in South Africa is conducted in the metro

11 000+ annual engineering, science and technology and mathematics graduates



Robust enabling infrastructure and investor support

BPESA Business Process Enabling South Africa

the dtic Department: Trade, Industry and Competition REPUBLIC OF SOUTH AFRICA

investSA ONE STOP SHOP

GAUTENG PROVINCE ECONOMIC DEVELOPMENT REPUBLIC OF SOUTH AFRICA

GGDA GAUTENG GROWTH AND DEVELOPMENT AGENCY

G:ENESIS GLOBAL BUSINESS SERVICES

Strong national government support with investor incentives

National Investment Promotion Agencies and Industry Bodies

InvestSA One-Stop-Shop

Core Mandate:

Attract and generate investment into as well as retaining investments in South Africa.

Primary Functions

- Market South Africa´s industry and sector specific investment opportunities.
- Produce and share relevant industry-specific information and content.
- Bespoke assistance to both potential and established investors during all stages of the investment process.
- Connecting investors with local stakeholders, business organisations and service providers.
- Initiating/supporting advocacy initiatives.

Business Process Enabling South Africa (BPESA)

Core Mandate:

Promote South Africa as offshore business process destination by creating a conducive trading environment for GBS operations to grow at scale

Primary Functions

- Providing market information and research to stakeholders.
- Plan, manage and coordinate the implementation of strategic skills initiatives.
- Mobilising and engaging with its membership body and industry partners to engage in industry activities to
- stimulate demand, build a sustainable supply of skills and contribute to the growth and transformation of the South African economy.
- Act as a liaison point between industry members and the local, provincial and national government.
- BPESA lobbies for policy alignment and other support for the development of the GBS sector.

Sources: InvestSA; BPESA

investSA
ONE STOP SHOP

the dtic
Department:
Trade, Industry and Competition
REPUBLIC OF SOUTH AFRICA

GBS INCENTIVES

South Africa's cost competitiveness – relative to the source markets and other competing location – has been further augmented and enhanced by the Global Business Services (GBS) incentive programme (effective 1 January 2019) by the Department of Trade, industry and Competition (dtic)

The programme introduces a number of new features aligning the incentives to south African's movement up the value chain and into specialist niche domain services and next-generational digital capabilities. The incentives will ensure that any organisation locating service delivery centres in the country will be able to extract real value from investing in the country and facilitating job creations.

Targeted Youth Employment



Non-Complex
Complex
High Complex



Real Value Cost Competitiveness



Incentive for new jobs created and sustained over five years

Reducing OPEX between

8 – 10 %

5 Year Cash incentive*



Strong provincial support with investor incentives

Gauteng Investment Promotion Agencies and Investment Enablers

Gauteng Growth and Development Agency (GGDA)

Primary Function

Implementation Arm of the **Gauteng Department of Economic Development**

Leading, Facilitating and Managing **Sustainable Job Creation** and **Inclusive Economic Growth and Development** in the Gauteng City Region

Key Services

- Accessing Finance
- Economic Intelligence
- Investor Match-making
- Location Benchmarking
- Incentive Provision
- Immigration
- Retention and Expansion
- Site Location

Gauteng Infrastructure Financing Agency (GIFA)

Primary Function

Supporting and **Executing Key Infrastructure Projects**

Institutionalise **Alternative Funding Models** for the Provincial Government

Key Mandate

- **Infrastructure Project Planning, Management and Technical Expertise**
- **Facilitate and Coordinate Alternative Funding Means**
- **Address Challenges around Infrastructure Delivery Capacity and Skills**
- **Develop Strategic Social Infrastructure Projects**

Sources: Organisation Websites

Strong provincial support with investor incentives

Gauteng Investment Promotion Agencies and Investment Enablers

Tshwane Economic Development Agency (TEDA)

Primary Function

Promoting and **Facilitation Investments** into the **City of Tshwane**

Capacity Development for **Emerging Exporters**

Key Services

- Project Development and Implementation
- Business Retentions and Expansions
- Investment Promotion and Facilitation
- Area Based Development
- Development Facilitation
- Destination Marketing
- Export Development and Promotion

Sources: Organisation Websites

Strong provincial government support with investor incentives

Special Economic Zones (SEZs) to Leverage for GBS/BPO Delivery Opportunities

OR Tambo SEZ	
Location	Ekurhuleni Municipality.
Focus Industries	Manufacturing, logistics, agro-processing, and aerospace.
Infrastructure	Modern industrial parks, utilities and transportation infrastructure.
Government Support	Government agencies and local authorities facilitate investment and business operations, providing assistance with permits, licenses, and other regulatory requirements.
Infrastructure Development Support	Provision of structure funding support for investments.
Competitive Rentals	Rental rates negotiated with each investor, based on financial and market indications.

Tshwane Automotive Special Economic Zone (TASEZ) Africa's First Automotive City	
Location	Tshwane Metropolitan Municipality.
Focus Industries	Automotive industry, encompassing manufacturing, assembly, research, and development activities.
Infrastructure	State-of-the-art infrastructure and facilities tailored to the needs of automotive businessesincluding industrial parks, utilities, and transportation infrastructure.
Government Support	Support from government agencies, local authorities, and industry stakeholders to facilitate investment and streamline regulatory processes.
Access to Services	Access to specialised support services such as business development assistance, market intelligence, training and skills development programs, and research and development facilities.

SEZ Incentives



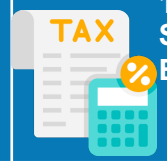
Preferential Corporate Tax
15% Corporate Tax rather than the 28% Headline Rate



Building Allowance
Accelerated Depreciation Allowance on Capital Structures



Employment Incentives
Reduction of the Amount of Pay-As-You-Earn (PAYE) Tax Payable for Low Salaried Employees



12I Tax Allowance
Supports Greenfield and Brownfield Investments



Customs Controlled Area
Import Duty Rebate and VAT Exemption

Sources: Gauteng Industrial Development Zone (GIDZ); dtic

Strong provincial government support with investor incentives

GAUTENG PROVINCE
ECONOMIC DEVELOPMENT
REPUBLIC OF SOUTH AFRICA

Gauteng Department of Economic Development

Economic Development Promotion and Facilitation

Lead, facilitate, and manage sustainable job creation and inclusive economic growth in the Gauteng city region

Strategic Goals

- Provide integrated economic and development planning
- Facilitate strategic programs stimulating brand competitiveness and social transformation
- Promote an efficient, equitable, and socially responsible business environment
- Enhance trade promotion and attract investment
- Promote public accountability and achieve high standards of corporate governance
- Act as an economic intelligence nerve centre informing strategic decision-making



Source: Gauteng Department of Economic Development

Strong provincial government support with investor incentives

Ease of Doing Business

investSA Gauteng One-Stop-Shop is positioned within the Gauteng Growth and Development Agency (GGDA) to provide an integrated service to investors by facilitating the entire value chain, from providing specialist advisory services to investors, coordinating efficiencies across various government departments, to acting as a window for clearance of registration, licensing and permits. Importantly, investSA Gauteng provides intergovernmental coordination and facilitation services



Strong provincial government support with investor incentives

The InvestSA One Stop Shop initiative is geared towards providing investors with services to fast-track projects and reduce government red tape when establishing a business

An investor can make an appointment, meet a government representative and **be guided by the representative through the process of setting up a business**

The One Stop **Shop simplifies administrative procedures for issuing business approvals, permits and licences** and thereby **remove bottlenecks** that investors may face in establishing and running businesses

Get your company registered in less than 24 hours

Companies and Intellectual Property Commission

US$7/ R125 — The price the CIPC charges for the registration of the company

US$3/ R50 — For reserving a name using the online system

US$9/ R175 — Therefore, at a minimum, the amount you will need to pay to register your business is US$9/R175

E-Services

Banks

- ABSA, FNB, Nedbank

Mobile App

- No supporting Documents needed

Walk-In Centres

- Available in all 9 provinces
- No supporting Documents needed

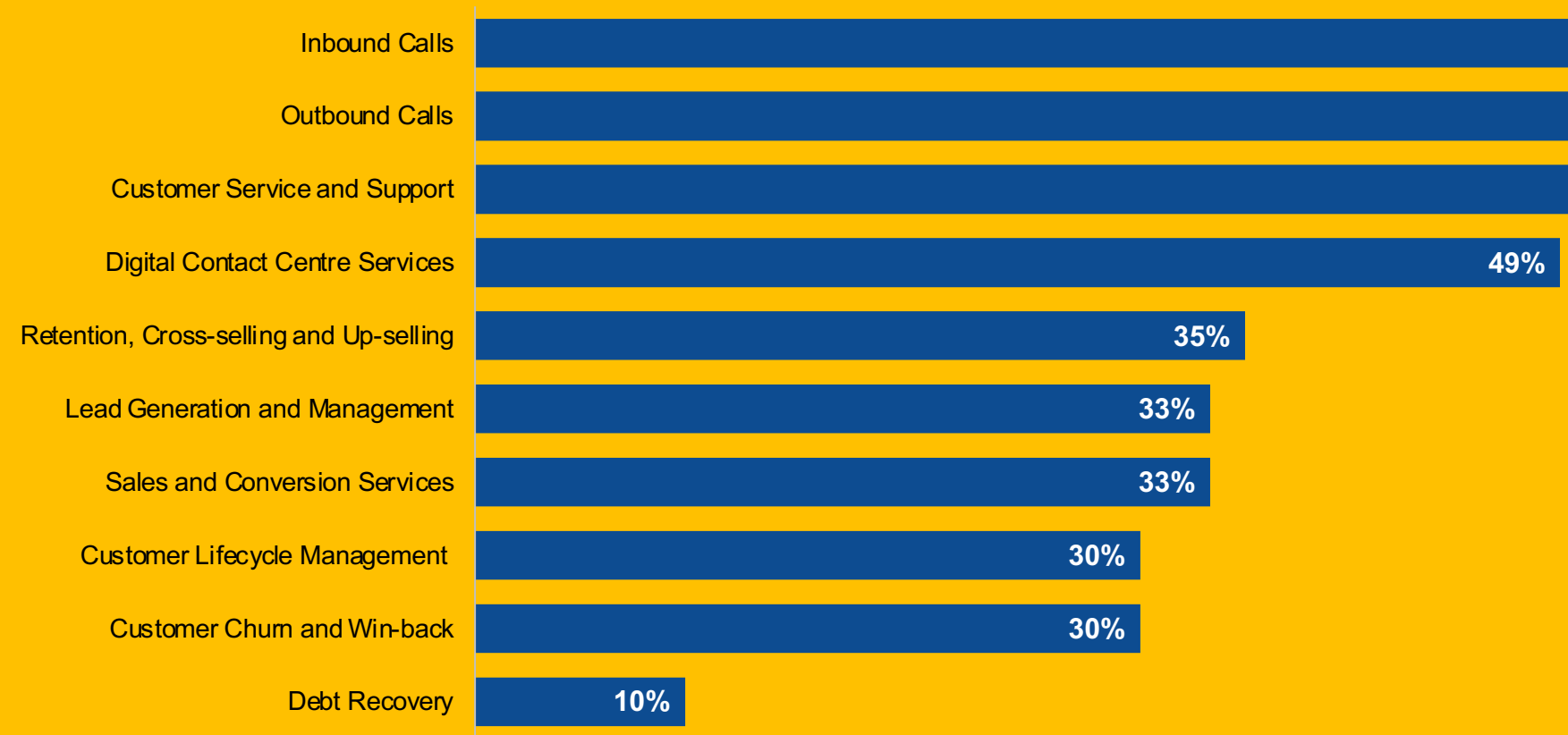
Established Tier 1, 2 and 3 cities and towns for scalable expansion

Tier I Locations

Tier I Locations For Call/Contact Centres, BPO or BPS services

9%	25%	27%	6%	18%	15%
Midrand	City of Johannesburg	Pretoria/Tshwane	Randburg	Sandton	Centurion

Call/contact Centre and BPO services provided from Tier I Locations in Gauteng





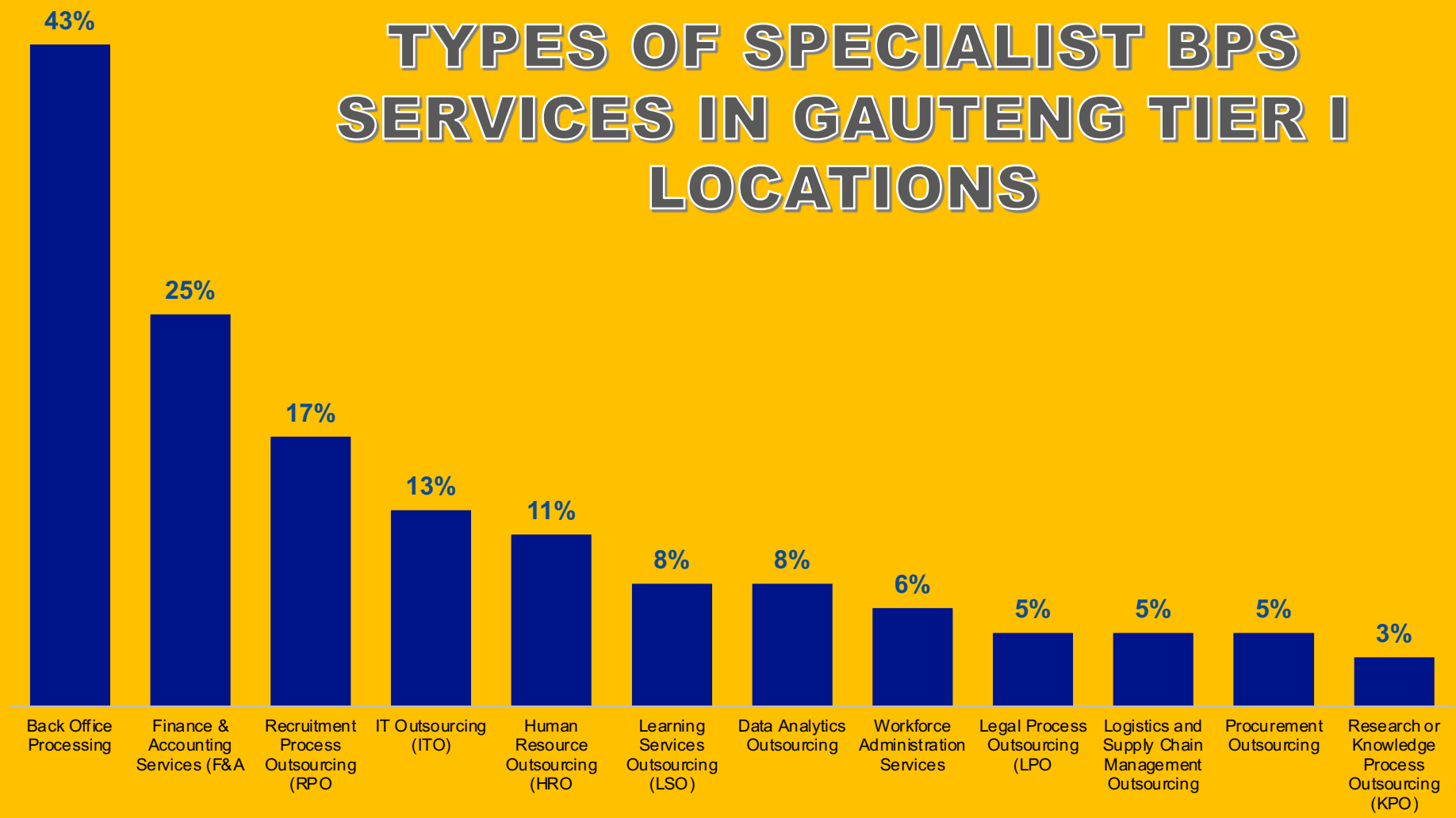
Source: 2021 Gauteng Global Business Services (GBS) Township Economic Regeneration Feasibility Survey

Established Tier 1, 2 and 3 cities and towns for scalable expansion





TYPES OF SPECIALIST BPS SERVICES IN GAUTENG TIER I LOCATIONS



Source: 2021 Gauteng Global Business Services (GBS) Township Economic Regeneration Feasibility Survey

Johannesburg GBS Delivery Key Highlights

JOHANNESBURG



CHARACTERISTICS	STATISTICS
EST. POPULATION	5,7 million
EST. YOUTH POPULATION (18-35)	1,9 million
EST. CONTRIBUTION TO NATIONAL GDP	US$63 billion
KEY UNIVERSITIES/COLLEGES	University of the Witwatersrand, University of Johannesburg, Central Johannesburg College, Regenesys Business School, Boston City Campus and Business College
TRANSPORT INFRASTRUCTURE	Johannesburg has a sophisticated transport network system and serves as the central point for most of South Africa's national highways connecting to other major cities in the country.
KEY FACTS	• Johannesburg generates 15% of South Africa's GDP employs 13% of the national workforce. • The city is recognized as the financial capital of South Africa

GBS/BPS&O Facts

Entry Level Talent Pool (est.) Annual matric and tertiary (TVET and university) graduates	81 000	Cost Savings	42% - 75%
DOMESTIC & INTERNATIONAL GBS TALENT POOL (est.)	137 000		
INTERNATIONAL GBS TALENT POOL (est.)	15 500		



©2023 BPESA and Genesis Global Business Services

As the Economic Capital, Johannesburg is a Burgeoning Hub for GBS Delivery

Strong Digital Capabilities

Strong digital capabilities including web chat, social media & instant messaging

Growing Capabilities in Global Legal Process Outsourcing

Flourishing legal services and credit lifecycle management centres

Robust Infrastructure

Highly-developed air and road transport infrastructure with links to major global business centres



Multitalented Skills Ecosystem

A high availability of qualified talent including CAs, CFAs, actuaries and paralegals

Vertical-specific Shared Services Expertise

Large shared services and co-sourced centres in banking, insurance, retail, technology and telecom vertical industries

Specialist Delivery Centres

Sophisticated, specialist delivery centres for F&A, ITO and learning services outsourcing

Source: 2019 Gauteng GPS Research and Value Proposition

©2023 BPESA and Genesis Global Business Services

Tshwane GBS Delivery Key Highlights

TSHWANE

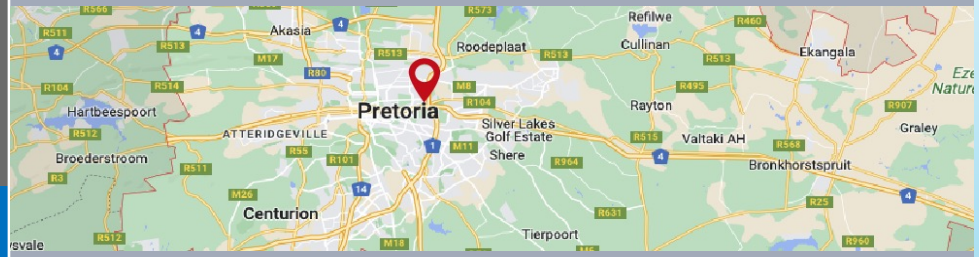


CHARACTERISTICS	STATISTICS
EST. POPULATION	4 million
EST. YOUTH POPULATION (18–35)	886 000
EST. CONTRIBUTION TO NATIONAL GDP	US$42 billion
KEY UNIVERSITIES/COLLEGES	**University of Pretoria, Tshwane University of Technology, University of South Africa & Tshwane TVET College (North & South),** Sefako Makgata Health Sciences University
TRANSPORT INFRASTRUCTURE	**The city lies only 50km from OR Tambo International Airport and is connected to the airport by the Gautrain rapid rail link.**
KEY FACTS	• **Tshwane/Pretoria is the administrative capital of South Africa with all the national government departments being located there.** • **Tshwane/Pretoria houses all the international embassies.** • **The city is a national centre of research and learning with four universities and seven of the eight national science councils.**

GBS/BPS&O FACTS

Entry Level Talent Pool (est.) Annual matric and tertiary (TVET and university) graduates	74 000
DOMESTIC & INTERNATIONAL GBS TALENT POOL (est.)	38 500
INTERNATIONAL TALENT GBS POOL (est.)	4 300

Cost Savings	42% - 75%



©2023 BPESA and Genesis Global Business Services

Tshwane is a Cyber and Knowledge Economy Hub for IT-Enabled Business Processing

Exemplary Compliance

High prevalence of ISO-certified security and quality management audited processes

Significant pool of service talent and skills

High availability of qualified finance, research and ICT talent

Digital Expertise

A cyber hub of traditional and cloud-based digital and ICT expertise with technical & application support centres



World-class ICT Infrastructure

Strong ICT infrastructure, with both extensive fixed and pervasive high-speed wireless services

A Research Mecca

High concentration of academics, learning institutions, researchers & scientists. 90% of research & development in South Africa is conducted in the metro

Data Analytics Hub

Emergent capabilities in big data, customer feedback, social media and predictive analytics.

Sources:
2024 Gauteng GBS Research and Value Proposition
2019 – 2020 Tshwane GBS Quantification Report

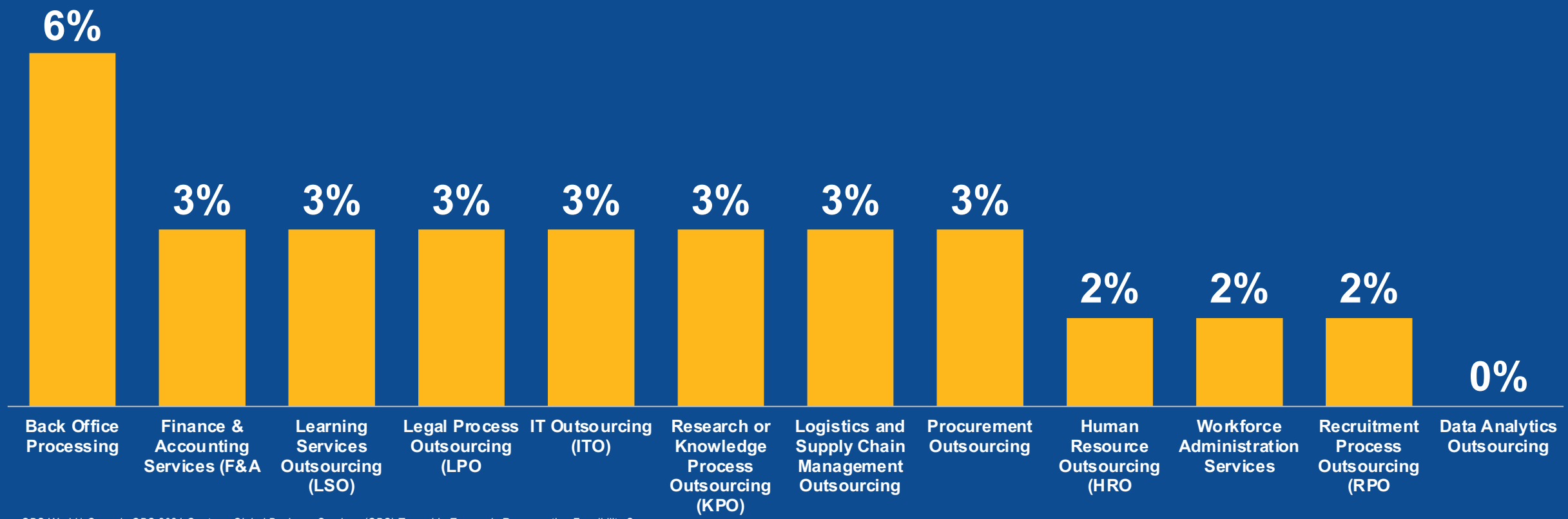
©2023 BPESA and Genesis Global Business Services

Established Tier 1, 2 and 3 cities and towns for scalable expansion





Types of Specialist BPS Services in Gauteng Tier II Locations



Source: GBS.World | Genesis GBS 2021 Gauteng Global Business Services (GBS) Township Economic Regeneration Feasibility Survey

Established Tier 1, 2 and 3 cities and towns for scalable expansion

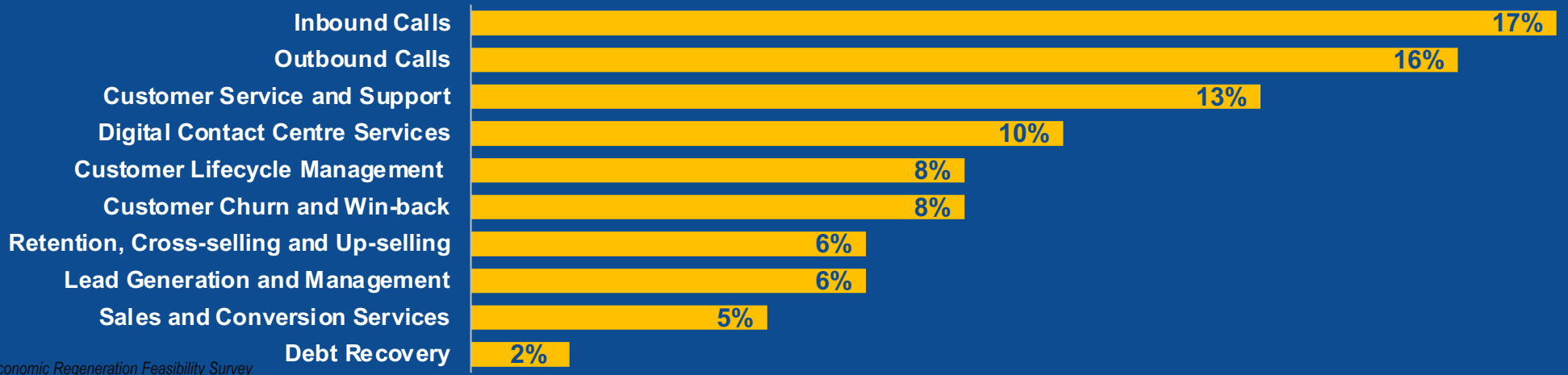
Tier II Locations

Tier I Locations For Call/Contact Centres, BPO or BPS services

- 28% Roodepoort
- 27% Vereeniging
- 9% Benoni
- 9% Randfontein
- 9% Krugersdorp
- 9% Edenvale
- 9% Kempton Park



Call/contact centre and BPO services provided from Tier II Locations in Gauteng



Source: 2021 Gauteng Global Business Services (GBS) Township Economic Regeneration Feasibility Survey

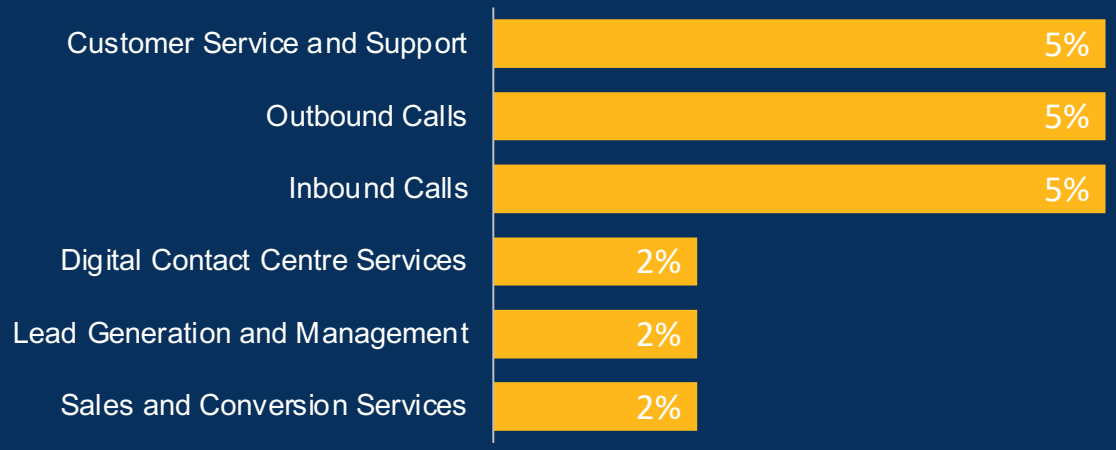
Established Tier 1, 2 and 3 cities and towns for scalable expansion

Tier III Locations

GBS/BPO Services are Currently Delivered from:

Mamelodi | Sebokeng | Soshanguve | Soweto

Call/contact centre and BPO services provided from Tier III Locations in Gauteng



Types of Specialist BPS Services in Gauteng Tier III Locations



Source: 2021 Gauteng Global Business Services (GBS) Township Economic Regeneration Feasibility Survey

Established Tier 1, 2 and 3 cities and towns for scalable expansion



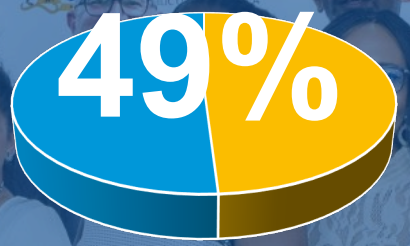
Reasons for GBS/BPO Providers to Expand to Townships

- **31%** Reliable transportation service for agents
- **27%** Work-from-home opportunities
- **27%** Access to enabling technology
- **25%** Accessible training facilities
- **25%** Tap into a new pools of talent
- **23%** Great voice-based skills
- **21%** Secure facilities and safety guarantees
- **21%** Price/ competitive advantages compared to urban centres
- **21%** Potential workers with excellent digital skills
- **21%** Government incentives or support
- **21%** Agents with special domain skills (F&A, IT)
- **19%** Good ICT infrastructure
- **12%** Potential employees with first-rate analytics skills

Source: 2021 Gauteng Global Business Services (GBS) Township Economic Regeneration Feasibility Survey

Established Tier 1, 2 and 3 cities and towns for scalable expansion

Tier III Locations



Percentage of Gauteng-based GBS/BPO Operators Planning to Expand into Tier III Locations

Recent Expansion by a GBS/BPO Operator

CX and contact centre operators are focusing on launching delivery sites within Tier III or township locations, with **Merchants opening its new contact centre in Jabulani, Soweto**

- Employs 200 youth workers (Ages 18 to 35).
- Capacity to employ 250 agents.
- Recruitment is facilitated through Merchants' MyCalling platform, which matches job seekers to suitable roles through behavioural profiling rather than traditional factors like educational background – removing the very real barriers to entry.
- The initiative will strengthen the township's circular economy by tapping into local Small, Medium and Micro-Enterprise (SMME) services and subsequently introducing new businesses to the growing precinct.





Merchants goes local with first township-based call center





Sources: Merchants; GBS.World | Genesis GBS 2021 Gauteng Global Business Services (GBS) Township Economic Regeneration Feasibility Survey

First class air infrastructure with 118 direct flights



O.R. Tambo International Airport

58 International Destinations

39 Countries

47 International Airlines

Direct International Flights to-and-from O.R. Tambo International Airport

O.R. Tambo has direct flights to the following key international destinations:

- ✓ **21** Flights per week to **London**
- ✓ **7** Flights per week to **Atlanta**
- ✓ **7** Flights per week to **Sydney**
- ✓ **7** Flights per week to **New York**
- ✓ **35** Flights per week to **Dubai**
- ✓ **14** Flights per week to **Frankfurt**
- ✓ **7** Flights per week to **Paris**
- ✓ **14** Flights per week to **Singapore**
- ✓ **7** Flights per week to **Hong Kong**

O.R. Tambo International Airport is the **Largest** and **Second-busiest** Airport in Africa

15,6 Million Passengers per Annum (2022/23)

181 527 Aircraft Movements per Annum (2022/23)

21 Domestic Destinations

39 Regional Destinations

Direct Regional and Domestic Flights to-and-from O.R. Tambo International Airport

Source: Airports Company South Africa; Nairametrics; GetToCenter; FlightsFrom; Lansersia International Airport

First class air infrastructure with 118 direct flights



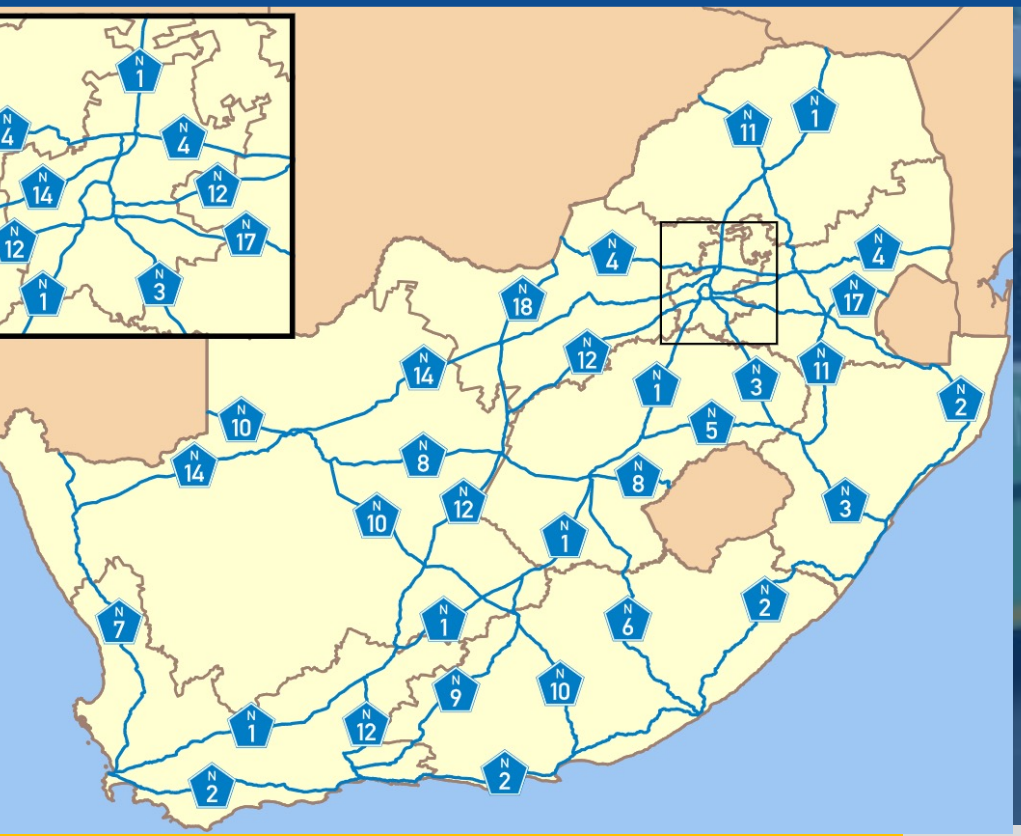
Lanseria Airport

Privately-owned international airport situated north of Randburg and Sandton to the northwest of Johannesburg

Commercial Flights to Cape Town and Durban with More to Come

Source: Airports Company South Africa; Nairametrics; GetToCenter; FlightsFrom; Lansersia International Airport

First-class road transport infrastructure



9

National Highways Connecting to Gauteng to Major Cities, including **Bloemfontein, Cape Town, Durban** and **Pretoria/Tshwane**

5 640 Kilometres

Total Length of Gauteng's Road Network Supporting

39%

Of South Africa's Vehicles

2,4 Million

Total Peak Hour Traffic Trips per Year Supported by Gauteng's Road Network

City Bus Services (Pretoria/Tshwane)



Tshwane Bus Services (TBS)

- Covers various areas within the city of Pretoria, including both central business districts and outlying suburbs.
- Utilises a smart card system for fare payment.
- Integrated with the Gautrain and Metrorail services.

City Bus Services (Johannesburg)



Metrobus

- Johannesburg's primary and largest bus service.
- Transports 90 000 passengers per day.



Rea Vaya

- Bus Rapid Transport (BRT) System in Johannesburg.
- 21 routes stopping at 58 stations along a 59-kilometre stretch.
- Links the Johannesburg Central Business District and Braamfontein with Soweto

Sources: Gauteng Department of Roads and Transport Household Travel Survey 2019/20; MyTransport.medium; South Africa Government Provincial Budgets And Expenditure Review: 2015/16 – 2022/23

First-class rail transport infrastructure



Gautrain

Launched during the 19th FIFA World Cup, the Gautrain is a significant transportation infrastructure project in South Africa, serving cities of Johannesburg and Pretoria



80 Kilometres
Total Length of the Gautrain Rail System



13 000
Total Number of Daily Gautrain Riders

1st
High-speed Urban Train in Africa

160 kmph (100 mph)
Top Speed of Gautrain

Sources: Gautrain Management Agency; South Africa Government Provincial Budgets And Expenditure Review: 2015/16 – 2022/23

First-class rail transport infrastructure

Gautrain Routes



The Gautrain links key locations in Gauteng, including O.R. Tambo International Airport, Johannesburg, and Pretoria/Tshwane.

Gautrain Feeder Busses



- Each Gautrain station has a network of Gautrain feeder buses connected to them.
- Gautrain busses run every 12 minutes in peak hours and every 20 minutes during off-peak times.

Safety and Security

CCTV surveillance, emergency call buttons, and security personnel stationed at stations and aboard trains ensures the well-being of passengers.

1306

Number of Daily Gautrain Bus Passengers During Peak-hour Traffic

Great lifestyle, cost-effective living standards and operating environment

Cost of Living in Gauteng Compared to International Cities



- 68% Cheaper than New York
- 60% Cheaper than London
- 53% Cheaper than Paris
- 52% Cheaper than Tokyo
- 59% Cheaper than Los Angeles

Property Costs in Gauteng

Private Residence – Rental Rates and Property Sales

US$222 – US$611
Monthly rental rate for a one-bedroomed apartment

US$472 – US$1 667
Monthly rental rate for a three-bedroomed house

US$76 100
Average Property Asking Price

Commercial Property – Average Monthly Rentals per Property Grade

	P Grade	A Grade	B Grade
Johannesburg	R222 (US$12.33) per m²	R144 (US$8) per m²	R117 (US$6.5) per m²
Pretoria/Tshwane	R195 (US$10.83) per m²	R135 (US$7.5) per m²	R103 (US$5.72) per m²

Other Costs

Sources: GBS.World | Genesis GBS; Expatica

R1 092/US$61
Average 4-Star Hotel Price per night, per person

R850/US$47
Average Parking Cost per month

Staff and Agent Transport in Gauteng





Types of Private and Public Transport used by Gauteng Commuters Traveling to Work

- **21.3%** Minibus Taxis
- **32%** Private Vehicles
- **2%** Bus

Types of Public Transport used by Gauteng Commuters Traveling to Work

- **77%** Minibus Taxis
- **5.9%** Bus
- **14.2%** Metered Taxi

City	Bus Fare	Mini Bus Fare
South Africa	R25/US$1.4 – R85/US$4.7	R21/US$1.16 – R42/US$2.33
Johannesburg	R35/US$1.94 - R195/US$10.83	R11/US$0.61 – R35/US$1.94
Tshwane	R20/$1.11 - R195/$10.83	R15/$0.83 - R45/$2.50

Source: Gauteng Department of Roads and Transport Household Travel Survey 2019/20

Great lifestyle, cost-effective living standards and operating environment

Johannesburg

Ranked 105th out of 241 countries in Mercer's Quality of Living Index 2023, Johannesburg offers the following attractions:

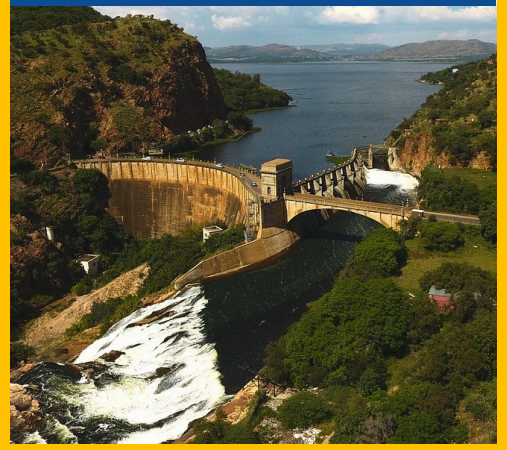
Cradle of Humankind



Johannesburg Botanical Gardens



Hartebeespoort Dam



Lion and Cheetah Parks



Pretoria/Tshwane

The administrative capital of South Africa, Pretoria/Tshwane offers the following attractions:

Dinokeng Game Reserve



Lesedi Cultural Village



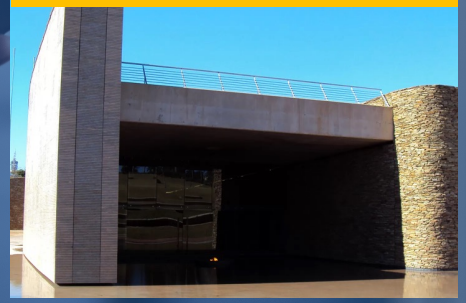
Lion and Cheetah Parks



Voortrekker Monument



Freedom Park Heritage Site



Great lifestyle, cost-effective living standards and operating environment



Johannesburg Lifestyle Facts:

- 916+ Restaurants
- 1530+ Schools
- 12+ Major Shopping Malls
- 16+ Theatres, Galleries & Museums
- 2+ Nature Reserves
- 4+ Animal Parks
- 13+ Golf Courses
- 3+ Casinos
- 3+ Big Event Venues
- 12+ Spa & Wellness Centres
- 2+ Racecourses
- 3+ Village Markets



Mountains

Several notable mountains and scenic areas provide opportunities for outdoor recreation and exploration. Magaliesberg Mountains, Suikerbosrand Nature Reserve and Hennops Hiking Trail are some of the mountain attractions on offer for residents and visitors.



Pretoria/Tshwane Lifestyle Facts:

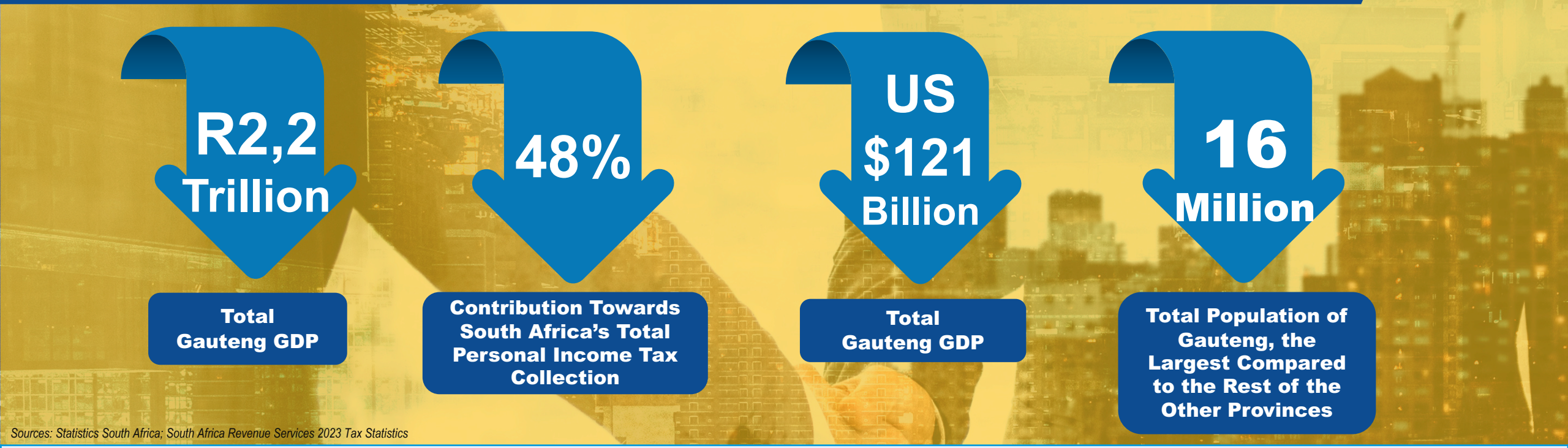
- 611+ Schools
- 11+ Theatres, Galleries & Museums
- 7+ Major Shopping Malls
- 366+ Restaurants
- 2+ Nature Reserves
- 4+ golf courses
- 1+ Big Event Venue
- 4+ Animal Parks
- 4+ Hiking Trails
- 1+ 4x4 trail
- 2+ Village Markets



Safaris

A variety of safari parks offer residents and visitors the opportunity to experience wildlife and nature without traveling far from urban centres. Rietvlei Nature Reserve, Dinokeng Game Reserve and Lion & Safari Park, among others, provide a convenient escape into the wilderness.

The business and economic hub for South Africa and sub-Saharan Africa with a sound financial sector ranked 19th by the World Economic Forum



Sources: Statistics South Africa; South Africa Revenue Services 2023 Tax Statistics

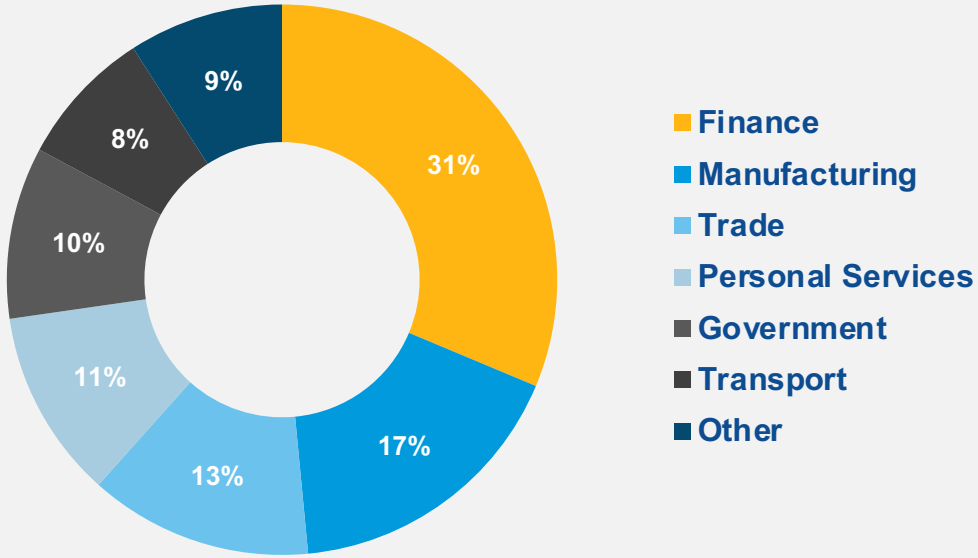
Provincial Contribution towards South Africa's GDP

33.1% Gauteng	**15.9%** KwaZulu-Natal	**13.9%** Western Cape
8% Mpumalanga	**7.7%** Limpopo	**7.6%** Eastern Cape
6.6% North West	**4.9%** Free State	**2.2%** Northern Cape

The business and economic hub for South Africa and sub-Saharan Africa with a sound financial sector ranked 19th by the World Economic Forum



Largest Industries in Gauteng, Percentage Contribution to GDP, 2022



Gauteng is the BFSI Capital of South Africa with:

89% of the Country's Largest Banks

90% of the South Africa's Largest Insurers Headquartered in Gauteng

Major Financial Institutions including

The Johannesburg Stock Exchange (JSE) and The South African Reserve Bank

are Located in Gauteng

Sources: Statistics South Africa; South Africa Revenue Services 2023 Tax Statistics

The business and economic hub for South Africa and sub-Saharan Africa with a sound financial sector ranked 19th by the World Economic Forum

Gauteng's composition of Sub-Saharan Africa's total GDP is **6%** yet Gauteng only comprises **0.07%** of the region's landmass

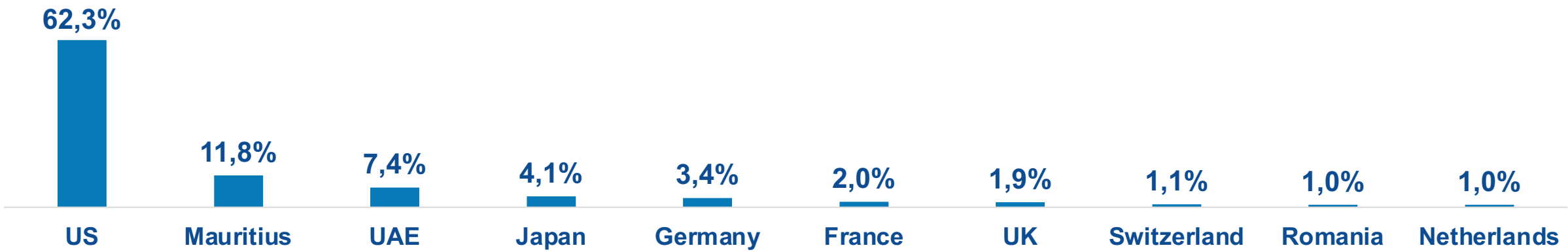
South Africa is ranked **19th out of 141 countries** for its **financial system**

Africa's Richest Square Mile

Sandton in Johannesburg is considered to have a notable concentration of wealth accommodating 10 000 businesses, many of which host corporates from around the world.

South Africa receives **30%** of **Sub-Saharan Africa's Foreign Direct Investment (FDI) inflows**, the **highest amount in the region**.
Gauteng receives the largest portion compared to the country's remaining 8 provinces.

Top 10 FDI Contributors for Gauteng



Sources: World Bank; World Economic Forum; Wesgro

The business and economic hub for South Africa and sub-Saharan Africa with a sound financial sector ranked 19th by the World Economic Forum

International firms have chosen to locate their headquarters in Gauteng due to the province's superior connectivity with the rest of Africa and the world

NOTABLE International Brands Operating in Gauteng

- BMW
- Airbus
- Anglo American
- General Electric
- Gillette
- GlaxoSmithKline
- Harambee
- IBM
- JP Morgan

NOTABLE International Brands Operating in Gauteng

- Kellogg's
- Kimberly-Clark
- KPMG
- Nescafe
- Oracle
- Pampers
- Pepsico
- Spaces
- Vodafone

SOME NOTABLE Brands Using Gauteng as a Gateway to Africa

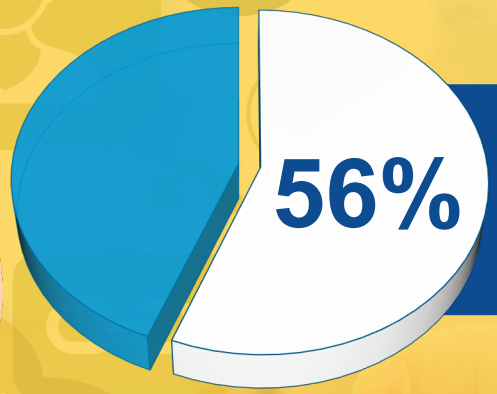
- Dachser
- Hisense
- Thomson Reuters
- Walmart

International Brands Servicing Africa from Gauteng

- Coca Cola
- Google
- Microsoft

Leading-edge enabling technology and communications platforms with global connectivity





Percentage of South Africa's Data Centres Located in Gauteng

34 **Total Number of Data Centres in Gauteng**

Top Colocation Providers

Africa DataCentres

Broadband Infraco

orange™ Business Services

NTT

TATA COMMUNICATIONS

TERACO™ DATA ENVIRONMENTS

Global cloud providers with local data centres in Gauteng

Google

Data centre established in **Johannesburg** as part of the **Africa Data Centres** expansion
Features include **15 000 sqm** of **data hall space**

aws

- 1 of 3 AWS User Groups is in **Johannesburg**
- Supports **23** corporate partners, including **Accenture**, **Deloitte**, & **HCL**
- Delivers over **43** Amazon services to the **African continent**

Microsoft

Azure data cloud centres in **Johannesburg** delivering over **100** services to African businesses

Resilient business continuity

South Africa is experiencing notable electricity shortages; however, the public and private sector have implemented a range of contingencies to mitigate these challenges

Availability of diesel supply for the Open Cycle Gas Turbines is being improved



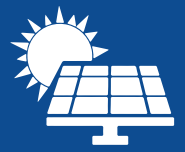
Eskom will continue to implement reliability maintenance across its fleet.



The energy action plans focuses on two overriding objectives:

- To improve the performance of Eskom's existing power stations.
- To add as much generation capacity to the grid as possible, as quickly as possible.

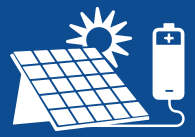
Acceleration procurement of new generation capacity:



The amount of new solar PV and wind generation capacity procured through Bid Window 6 is being doubled from 2600 MW to 5 200 MW.



Government is working to ensure that projects from Bid Window 5 and the risk mitigation procurement programme are able to proceed as quickly as possible.



Additional capacity will be made available in the short term by allowing existing IPPs to sell surplus power and by enabling Eskom to procure power from existing private generators (such as mines and shopping malls) at a standard price.



Transforming the electricity sector to achieve long-term energy security:

- Eskom is being unbundled to create an independent, state-owned transmission company.
- The Electricity Regulator Amendment Bill will be fast-tracked to establish a competitive market for electricity.
- These changes will allow multiply generators (both private and state-owned) to compete on an equal footing, while the grid remains public.

Combating crime

While aggravated robbery and carjacking have increased, there has been a decline in burglary, sexual offences and CIT robbery

In 2024, South Africa had a crime index of 75.4, the **lowest indexes recorded in the country since 2017**





The South African Police Service (SAPS) consists of **1154** police stations with over **176 180** police officers across South Africa with plans to increase the number of new recruits by **10 000** during 2024

Oct-Dec 2022 compared to Oct-Dec 2023

Burglary	Sexual Offences	CIT Robbery	Business Robbery	Murder	Aggravated Robbery	Carjacking
-4.4%	-1.7%	11 counts lower	-5.9%	+2.1%	+6.6%	+6.5%

There are more than **2.7 million** registered private security officers in South Africa, according to the Private Security Industry Regulatory Authority

Private security firms have had a **significant positive impact** on crime in South Africa

The number of security businesses in South Africa grew by **43%** in the past decade

The number of registered security officers has increased by **44%**

Sources: Statista, The Herald, Third Quarter Crime Statistics 2023/2024

Combating crime

Government continues to support SAPS in Gauteng and improve police visibility in communities and access to police services

The Government regards the prevention of crime as a national priority. Provincial governments will work together to implement the National Crime Prevention Strategy (NCPS)



The Gauteng Provincial Government donated **250 high-powered vehicles** to the SAPS to enhance crime fighting within the communities.



They have also handed over **12 mobile police stations** to SAPS to enable people in precincts without police stations to report crimes.



Over **7 000 CCTV cameras working** in an integrated collaboratively manner to make our province safer

Multi-Party Charter Unveils **Plan to Combat Crime** by focusing on four priorities:

1. **Professionalising the police service**
2. **Improving the criminal justice system**
3. **Addressing our nation's drug problem**
4. **Tackling corruption and State capture**



Specific initiatives have been implemented to address the level of road accident caused by driving under the influence

- **Reducing BAC threshold limits for drivers**
- **More frequent roadblocks and police presence**
- **Strict penalties for offenders**

Sources: ActionSA, scielo.org.za, gov.co.za

Combating crime

Gauteng is among the top 4 South African provinces that have managed reduced their overall crime rates

The Gauteng Police Commissioner says contact crime has decreased by **5.9%** in the province, which is 446 counts less compared to the same period last year.

Finance Minister Mr Enoch Godongwana has allocated R765 billion in the 2024 budget to fight crime and corruption



"The government will continue prioritizing fighting crime and corruption with a focus on enhancing law enforcement agencies capabilities"

Gauteng is Investing in Innovative technology to fight crime

e-Panic Buttons in Gauteng

Successfully piloted the deployment of e-panic buttons, which operate through a cellphone app, among staff in Gauteng departments. During the pilot phase, over **7,900 users**, including **1000 Safety Ambassadors**, have downloaded the app.

From the 1st of April 2024, residents of Gauteng can use the e-Panic button to seek help in terms of crime or medical challenges

Number plate recognition

Stolen and hijacked cars are central to crimes that are committed in our Gauteng. The current number plates system is outdated, and The National Department of Transport has developed a draft legislative proposal for the harmonisation of national plates which includes the security features

As of the 1st of April 2024, the government will pilot their new number plates that include a track and trace system.

Helicopters and drones

Gauteng has acquired two new helicopters and drones that have allowed them to establish the Gauteng Air Wing unit that did not exist before the last year. These helicopters have been instrumental in crime-fighting operations across the province, such as the operation to combat illegal mining and cash-in-transit attempts and hijacking.

All in all, the helicopters have conducted 101 operations between May 2023 and January 2024. where 255 suspects were arrested, 63 vehicles recovered

Sources: Govt.co.za, YFM, parliament.gov.za

Green Energy Support

The Gauteng Department of Economic Development (GDED) through Service Level Agreement appointed NCPC-SA, a unit within CSIR to implement the project to support the SMEs with green energy alternatives.

The Department has invested **R11 million** towards the support of the SMEs

30 SMEs

identified as expression of interests through the expression of interest process

17 Companies

Received the solar PVs installations which includes solar panels, batteries and three phase inverters

The project at an overview managed to **improve the energy security at the SMEs** and the implementation **contributed to the business improvement**

Many of the South African entrepreneurs **expressed gratitude over the support** they received and that **the project had a major positive impact on their business**



Gauteng aims to **scale-up the project to reach more SMEs** on energy security while **securing energy profile for the province** and grow the economy

In addition, Gauteng has committed to generate

400 megawatts

from alternative and renewable sources





Green Energy Support

The Gauteng government is committed to working with all spheres of government and stakeholders to end load shedding and ensure a stable supply of affordable power.

Gauteng's strategic intent includes the following:

- Ensuring **energy security** for desirable **economic growth**
- Ensuring universal, **affordable and modern energy to all citizens** of the Gauteng City Region
- Diversifying energy sources within the province to **include renewables and other forms of energy**
- **Promoting energy efficiency measures** across all sectors of the economy and improving provincial energy governance and administration.

Gauteng government has established the Energy Emergency Council to respond to the worsening electricity supply crisis.

The Gauteng Energy Crisis Response Plan aims to develop a sustainable energy mix to reduce the province's reliance on the national grid





Globally recognised vertical industry shared services expertise

BPESA Business Process Enabling South Africa

the dtic Department: Trade, Industry and Competition REPUBLIC OF SOUTH AFRICA

investSA ONE STOP SHOP

GAUTENG PROVINCE ECONOMIC DEVELOPMENT REPUBLIC OF SOUTH AFRICA

GGDA GAUTENG GROWTH AND DEVELOPMENT AGENCY

G:ENESIS GLOBAL BUSINESS SERVICES

Globally recognised vertical industry shared services expertise

Gauteng is seen to be the business hub for regional headquarters in South Africa and sub-Saharan Africa

180+ **Fortune 500 companies have chosen to locate in South Africa and Gauteng**

Gauteng is the BFSI Capital of South Africa with:

89% of the Country's Largest Banks

90% of the South Africa's Largest Insurers Headquartered in Gauteng

Major Financial Institutions including

The Johannesburg Stock Exchange (JSE) and The South African Reserve Bank are Located in Gauteng

International brands with regional headquarters in Gauteng

NOT EXHAUSTIVE

accenture, AIRBUS, Anglo American, Audi, Baker McKenzie, BMW, Cisco, Deloitte, EY, GE, Google, HP, Hogan Lovells, Herbert Smith Freehills, HSBC, IBM, Johnson & Johnson, J.P.Morgan, KPMG, Microsoft, Mercantile Bank Corporation, NTT, pwc, Oracle, SAP, Unilever, vodafone, Walmart

South Africa is ranked **19th out of 141 countries** for its **financial system**

Africa's Richest Square Mile

Sandton in Johannesburg is considered to have a notable concentration of wealth accommodating 10 000 businesses, many of which host corporates from around the world.

Globally recognised vertical industry shared services expertise

1 227 (est.)
Total International GBS/BPO Workforce Servicing the
Banking
Vertical Industry



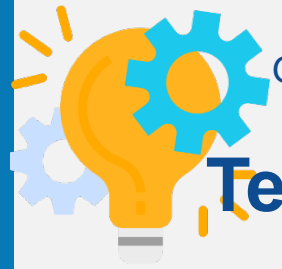
2 477 (est.)
Total International GBS/BPO Workforce Servicing the
Insurance
Vertical Industry



4 682 (est.)
Total International GBS/BPO Workforce Servicing the
Retail
Vertical Industry



1 135 (est.)
Total International GBS/BPO Workforce Servicing the
Technology
Vertical Industry



Top 5 Legal Shared Services Delivered from Gauteng

- Legal BackOffice Services
- Contract Review
- Contract Drafting
- Legal Research
- Corporate Legal Support

Legal Shared Services and Co-sourced Centres (#not exhaustive)

Reputable vertical specific expertise and co-sourced centres in banking and insurance



Banking

Est. GBS Job Growth **1 227**

- Automated Collections
- ATM & POS Network Management
- Card Services
- Collections (Early-stage & End-to-End Credit Lifecycle Management)
- Customer Experience (CX) Software Solutions
- Customer Retention
- Cybersecurity Services
- Data Analytics/Science
- Data Security & Compliance
- Deposit Accounts
- Digital Transformation
- Early-stage Collections
- Hyper-automation
- Inbound/Outbound Customer Service
- Inbound/Outbound Sales
- KYC Process
- Omnichannel Contact Centre Solutions
- Payment Processing Solutions
- Regulatory Technology (RegTech)
- Risk Control Solutions
- Technical Support



Insurance

Est. GBS Job Growth **2 477**

- Actuarial Science Services
- Back office Processing
- Brokering Services
- Claims Processing
- Collections (Early-stage & End-to-End Credit Lifecycle Management)
- Customer Retention
- Data Analytics/Science
- End-to-end Operations Management
- Inbound/Outbound Customer Service
- Inbound/Outbound Sales
- Investment Accounting
- KYC Process
- Life & Annuities Services
- Omnichannel Contact Centre Solutions
- Property & Casualty Services
- Technical Support
- Third Party Administration
- Underwriting Solutions

Shared Services and Co-sourced Centres (#not exhaustive)

Investec | Standard Bank | Discovery Bank | First National Bank | Discovery Insure | OUTSURANCE | TELESURE INVESTMENT HOLDINGS

Sources: GBS.World | Genesis GBS; BPESA GBS Jobs Reports

Flourishing retail and technology shared services expertise



Retail
Est. GBS Job Growth **4 862**

- Back office Processing
- Collections
- Contact Management
- Complaints Handling
- Customer Acquisition & Retention
- Customer Relationship Management
- Customer Services
- Data Analytics
- Digital Optimisation
- Inbound & Outbound Sales
- Marketing Services
- Order Fulfilment
- Paid Search Services
- Retail Analytics
- Revenue Management
- Sales-as-a-Service (SaaS)
- Transaction Processing
- User Experience (UX) Services



Technology
Est. GBS Job Growth **1 135**

- Application Development & Management
- Artificial Intelligence
- Cybersecurity Services
- Data Analytics and Business Intelligence
- Data Centre Functions
- Financial Software Integration
- Financial Technology (FinTech) Solutions
- Hybrid, Private and Public Cloud Services
- Machine Learning
- Network Security
- Software Development
- Technical & Helpdesk Support
- User Experience (UX) Design/Management

Shared Services and Co-sourced Centres (#not exhaustive)

dimension data an NTT company | IBM | Microsoft | Westcon Comstor | Google

Sources: GBS.World | Genesis GBS; BPESA GBS Jobs Reports

Notable shared services global delivery centres in legal services

Top Legal Shared Services Delivered from Gauteng

- 25% Legal Back Office Services
- 18,8% Contract Drafting
- 12,5% Contract Review
- 12,5% Legal Researc
- 12,5% Corporate Legal Support
- 6,3% Legal & Regulatory Training
- 6,3% Personal Injury Claims
- 6,3% Property Law

Shared Services and Co-sourced Centres (#not exhaustive)

Sources: GBS.World | Genesis GBS; Organisation Websites

BOWMANS
THE VALUE OF KNOWING

ISS INNOVATIVE SHARED SERVICES

PG GROUP

WNS



ANNEXURE

Cost of operations are at least 48%-84% lower than those in Australia and Canada

Est. Call/Contact Centre Salary Comparisons



Australia

Role	Entry Level		Intermediate		Senior	
	Australia	Gauteng	Australia	Gauteng	Australia	Gauteng
Inbound/Outbound Customer Service Agent	AUD 2 134	AUD 659	AUD 2 842	AUD 876	AUD 4 460	AUD 1 308
Inbound Sales Agent	AUD 3 600	AUD 583	AUD 3 600	AUD 767	AUD 5 000	AUD 1 150
Outbound Sales Agent	AUD 2 403	AUD 608	AUD 3 200	AUD 792	AUD 5 020	AUD 1 175
Team Supervisor/Manager	AUD 4 482	AUD 1 375	AUD 5 970	AUD 1 784	AUD 9 372	AUD 2 616
Contact Centre Manager	AUD 6 070	AUD 3 167	AUD 8 095	AUD 3 767	AUD 12 700	AUD 3 767



Canada

Role	Entry Level		Intermediate		Senior	
	Canada	Gauteng	Canada	Gauteng	Canada	Gauteng
Inbound/Outbound Customer Service	CAD 2 063	CAD 483	CAD 2 750	CAD 642	CAD 4 297	CAD 959
Inbound Sales	CAD 2 175	CAD 427	CAD 2 900	CAD 562	CAD 4 531	CAD 843
Outbound Sales	CAD 2 138	CAD 445	CAD 2 850	CAD 581	CAD 4 453	CAD 861
Team Supervisor/Manager	CAD 4 875	CAD 1 008	CAD 6 500	CAD 1 308	CAD 10 156	CAD 1 918
Contact Centre Manager	CAD 6 075	CAD 2 321	CAD 8 100	CAD 2 761	CAD 12 656	CAD 2 761

Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Gauteng presents strong contact centre cost arbitrage advantages compared to key source markets, where contact centre salaries are 48% to 84% lower than those in Australia and Canada.

Cost of operations are at least 33%-81% lower than those in the UK and the US

Est. Call/Contact Centre Salary Comparisons



United Kingdom

Role	Entry Level		Intermediate		Senior	
	United Kingdom	Gauteng	United Kingdom	Gauteng	United Kingdom	Gauteng
Inbound/Outbound Customer Service Agent	GBP 1 050	GBP 344	GBP 1 400	GBP 457	GBP 2 198	GBP 682
Inbound Sales Agent	GBP 1 400	GBP 304	GBP 1 900	GBP 400	GBP 2 900	GBP 600
Outbound Sales Agent	GBP 1 389	GBP 317	GBP 1 850	GBP 413	GBP 2 904	GBP 613
Team Supervisor/Manager	GBP 2 087	GBP 717	GBP 2 780	GBP 930	GBP 4 364	GBP 1 364
Contact Centre Manager	GBP 2 470	GBP 1 651	GBP 3 300	GBP 1 964	GBP 5 180	GBP 1 964



United States

Role	Entry Level		Intermediate		Senior	
	United States	Gauteng	United States	Gauteng	United States	Gauteng
Inbound/Outbound Customer Service Agent	USD 1 700	USD 425	USD 2 330	USD 565	USD 3 600	USD 844
Inbound Sales Agent	USD 1 820	USD 376	USD 2 520	USD 495	USD 3 900	USD 742
Outbound Sales Agent	USD 1 689	USD 392	USD 2 250	USD 511	USD 3 532	USD 758
Team Supervisor/Manager	USD 2 850	USD 887	USD 3 800	USD 1 151	USD 5 960	USD 1 688
Contact Centre Manager	USD 4 140	USD 2 043	USD 8 095	USD 2 430	USD 12 700	USD 2 430

Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

The province presents compelling contact centre cost advantages compared to the UK and US source markets, where salaries are 33% to 81% lower.

25 to 30% lower opex costs when benchmarked with other competitor locations

Est. Fully Loaded Full-time Inbound/Outbound Customer Service Agent Monthly Cost (per seat)

GBS incentives could further reduce the costs by 8 to 10%



The fully loaded costs comprises of the salary, IT, facilities, admin, operational management, operational functional and other operating costs. A South African industry-average mark-up is applied to the total costs.

Fully loaded monthly costs per contact agent seat in Gauteng is less expensive than those in Mexico, Poland and Malaysia.

However, when South Africa's GBS incentives are applied, fully loaded costs are in line with competitor locations renowned for their low price points, including the Jamaica, Philippines and Kenya.

Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Call/Contact Centre
Provincial Salary Comparisons

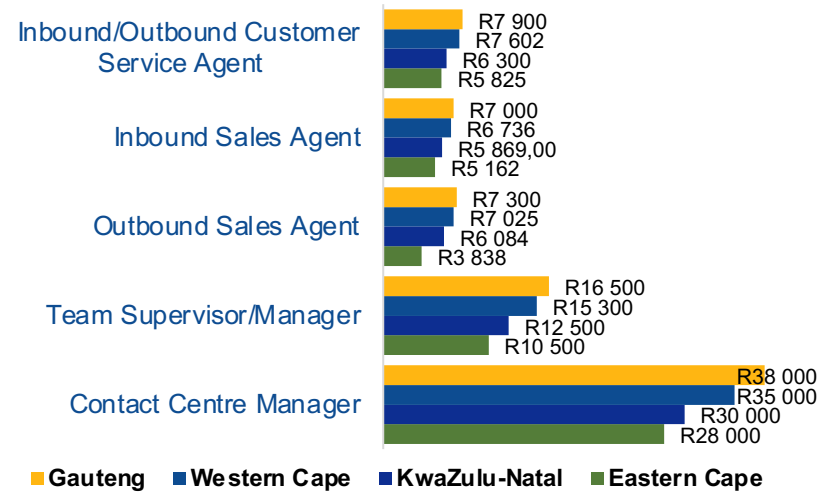
Est. Call/Contact Centre Salary Comparisons

Comparison Locations		Eastern Cape			Gauteng			KwaZulu-Natal			Western Cape		
Contact Centre Salaries	**Currency**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**
Inbound Customer Service Agent	ZAR	5825	7743	11577	7900	10500	15700	6300	8400	12800	7602	10104	15108
	USD	313	416	622	425	565	844	339	452	688	409	543	812
Outbound Customer Service Agent	ZAR	5825	7743	11577	7900	10500	15700	6300	8400	12800	7602	10104	15108
	USD	313	416	622	425	565	844	339	452	688	409	543	812
Inbound Sales Agent	ZAR	5162	6784	10176	7000	9200	13800	5869	7713	11570	6736	8853	13280
	USD	278	365	547	376	495	742	316	415	622	362	476	714
Outbound Sales Agent	ZAR	5383	7005	10397	7300	9500	14100	6084	7917	11751	7025	9142	13568
	USD	289	377	559	392	511	758	327	426	632	378	491	729
Debt Recovery Agent	ZAR	5900	7800	12000	8200	10800	16000	6500	8500	13000	8200	10800	16000
	USD	317	419	645	441	581	860	349	457	699	441	581	860
Team Leader	ZAR	10800	13500	18800	13800	17500	24176	12000	15000	21500	13500	17400	23900
	USD	581	726	1011	742	941	1300	645	806	1156	726	935	1285
Team Supervisor/Manager	ZAR	10500	13670	20000	16500	21400	31400	12500	16250	23800	15300	19950	29200
	USD	565	735	1075	887	1151	1688	672	874	1280	823	1073	1570
Contact Centre Manager	ZAR	28000	33500	45000	38000	45200	66300	30000	37900	45900	35000	43500	63800
	USD	1505	1801	2419	2043	2430	3565	1613	2038	2468	1882	2339	3430
Debt Recovery Manager	ZAR	24050	30000	46956	31158	41500	65149	25800	32000	50235	31534	42000	65934
	USD	1293	1613	2525	1675	2231	3503	1387	1720	2701	1695	2258	3545
Technology Manager	ZAR	30032	38600	50000	40000	46000	70000	35792	41000	52000	39000	45000	68000
	USD	1615	2075	2688	2151	2473	3763	1924	2204	2796	2097	2419	3656
Finance/Commercial Manager	ZAR	30278	38000	55945	36534	49000	68934	33600	45000	62794	35035	48000	67074
	USD	1628	2043	3008	1964	2634	3706	1806	2419	3376	1884	2581	3606
Key Accounts Manager	ZAR	19300	24400	35595	26275	35000	48600	20395	25500	38460	25900	35000	48000
	USD	1038	1312	1914	1413	1882	2613	1097	1371	2068	1392	1882	2581
QA/Coach	ZAR	8100	10280	16500	11750	16100	30000	8200	10400	17200	11690	16000	26800
	USD	435	553	887	632	866	1613	441	559	925	628	860	1441
Executive/Director	ZAR	65000	84488	127480	90000	120000	200000	69648	92000	137680	85419	110476	192460
	USD	3495	4542	6854	4839	6452	10753	3745	4946	7402	4592	5940	10347

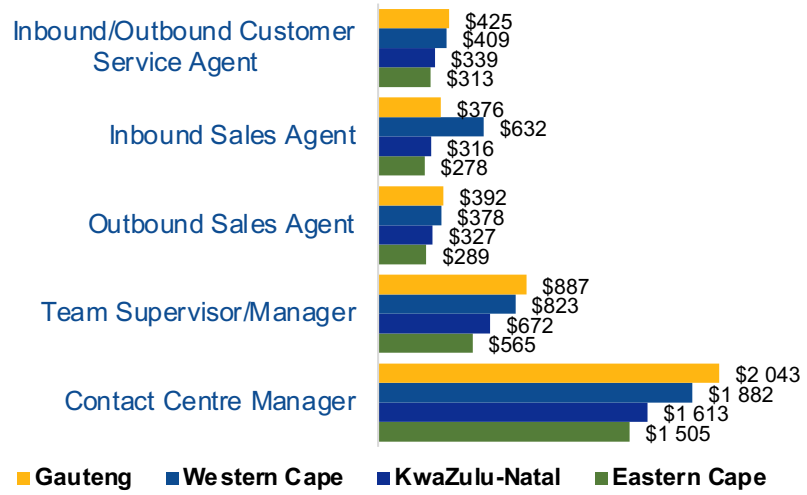
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Call/Contact Centre
Provincial Salary and Fully loaded Costs Comparisons

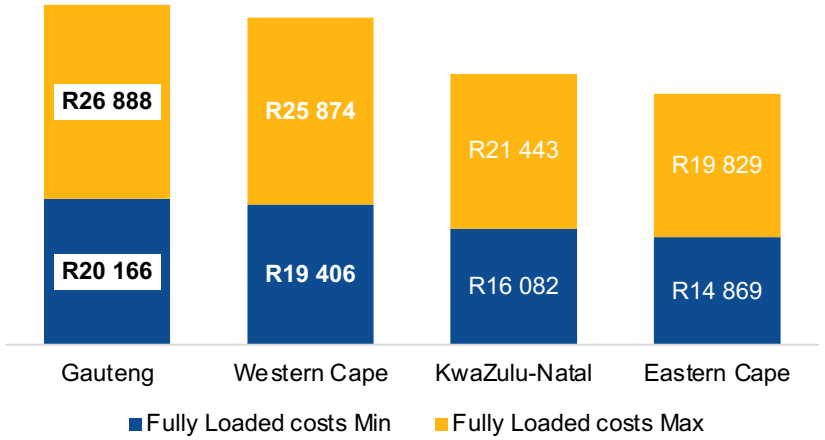
Est. Call/Contact Centre Salary Comparisons in ZAR (Entry Level)



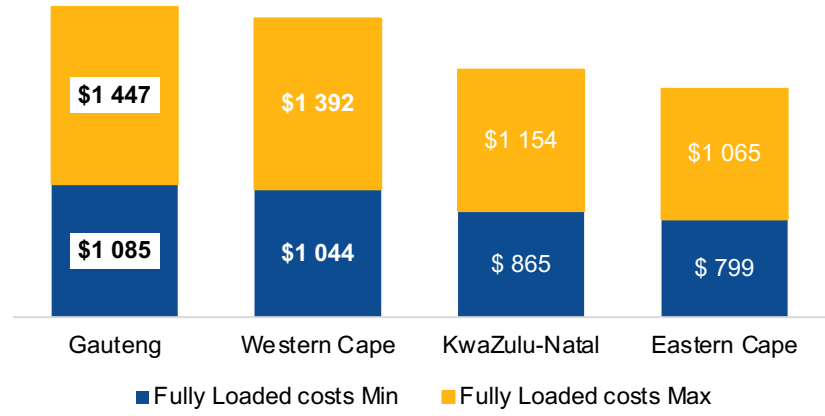
Est. Call/Contact Centre Salary Comparisons in USD (Entry Level)



Est. Fully Loaded Full-time Inbound/Outbound Customer Service Agent Monthly Cost in ZAR (per seat)



Est. Fully Loaded Full-time Inbound/Outbound Customer Service Agent Monthly Cost in USD (per seat)



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Call/Contact Centre
Source Market Salary Comparisons

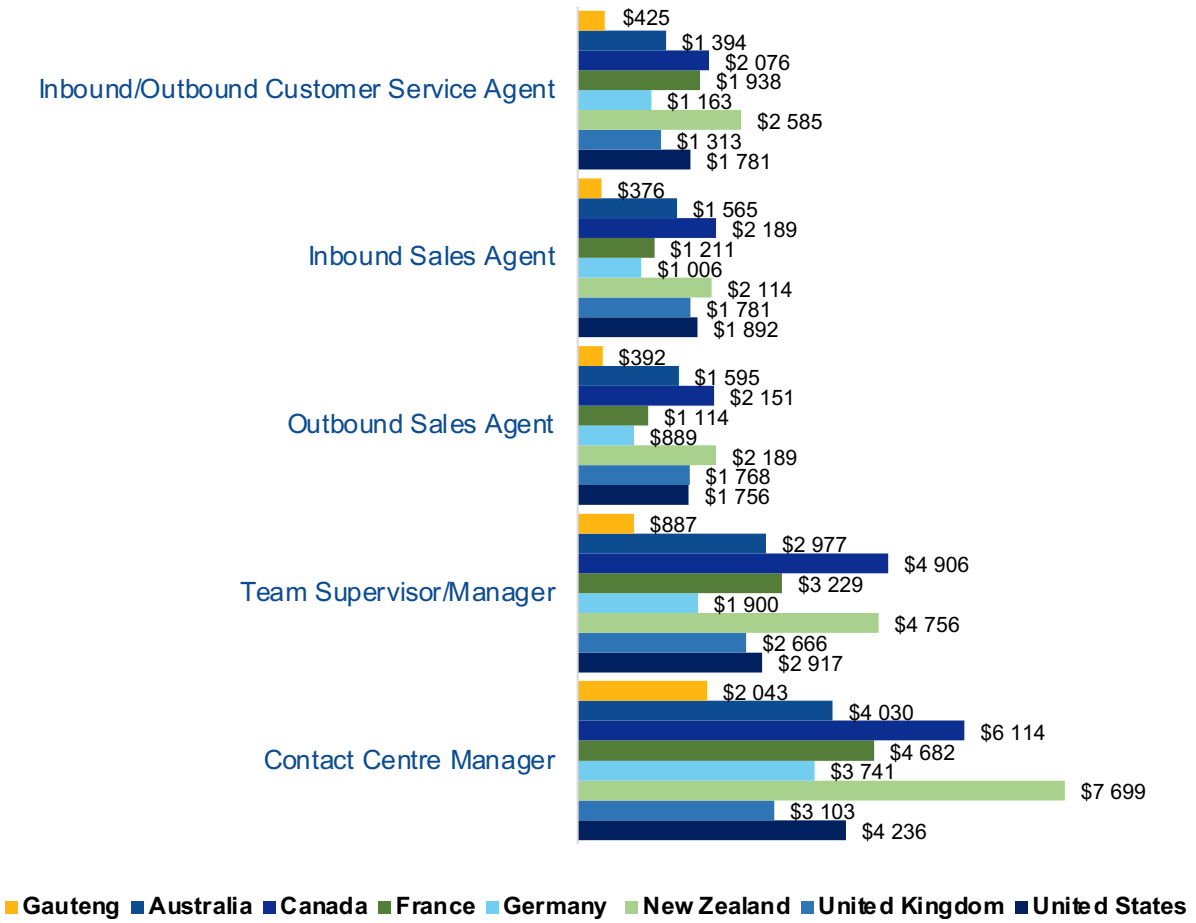
Est. Call/Contact Centre Salary Comparisons

Comparison Locations	Gauteng				Australia			Canada			France			Germany			United Kingdom			United States			New Zealand		
Contact Centre Salaries	Currency	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	Entry Level	Intermediate	Senior
Inbound Customer Service Agent	ZAR	7900	10500	15700	25900	34500	54000	38569	51425	80352	36000	48000	75000	21600	28802	39900	24400	32600	51100	33100	44200	69300	48036	64048	100074
	USD	425	565	844	1392	1855	2903	2074	2765	4320	1935	2581	4032	1161	1548	2145	1312	1753	2747	1780	2376	3726	2583	3443	5380
Outbound Customer Service Agent	ZAR	7900	10500	15700	24351	32437	50771	38569	51425	80352	34200	45600	71250	20480	27200	42800	22565	30651	48044	31121	41557	65156	49088	65450	102266
	USD	425	565	844	1309	1744	2730	2074	2765	4320	1839	2452	3831	1101	1462	2301	1213	1648	2583	1673	2234	3503	2639	3519	5498
Inbound Sales Agent	ZAR	7000	9200	13800	29085	44400	61670	40673	54230	84734	22500	30000	46875	18700	24900	39100	33100	44900	68500	35160	48600	75350	39270	52360	81813
	USD	376	495	742	1564	2387	3316	2187	2916	4556	1210	1613	2520	1005	1339	2102	1780	2414	3683	1890	2613	4051	2111	2815	4399
Outbound Sales Agent	ZAR	7300	9500	14100	29640	39470	61920	39971	53295	83273	20700	27600	43125	16511	21980	34500	32849	43751	68677	32633	43473	68243	40673	54230	84734
	USD	392	511	758	1594	2122	3329	2149	2865	4477	1113	1484	2319	888	1182	1855	1766	2352	3692	1754	2337	3669	2187	2916	4556
Debt Recovery Agent	ZAR	8200	10800	16000	32445	43223	67858	41795	55726	87072	45000	60000	93750	24300	32400	50800	35521	47299	74259	37135	49463	77653	56100	74800	116875
	USD	441	581	860	1744	2324	3648	2247	2996	4681	2419	3226	5040	1306	1742	2731	1910	2543	3992	1997	2659	4175	3016	4022	6284
Team Leader	ZAR	13800	17500	24176	41494	55260	86714	82748	110330	172391	55500	74000	115625	29500	39560	61600	36817	49089	76935	53160	70817	111172	72930	97240	151938
	USD	742	941	1300	2231	2971	4662	4449	5932	9268	2984	3978	6216	1586	2127	3312	1979	2639	4136	2858	3807	5977	3921	5228	8169
Team Supervisor/Manager	ZAR	16500	21400	31400	55307	73669	115668	91163	121550	189922	60000	80000	125000	35300	47100	73900	49525	65607	102990	54190	72180	113300	88358	117810	184078
	USD	887	1151	1688	2973	3961	6219	4901	6535	10211	3226	4301	6720	1898	2532	3973	2663	3527	5537	2913	3881	6091	4750	6334	9897
Contact Centre Manager	ZAR	38000	45200	66300	74872	99850	156650	113603	151470	236672	87000	116000	181250	69500	92600	145400	57660	76800	120560	78700	104850	164600	143055	190740	298031
	USD	2043	2430	3565	4025	5368	8422	6108	8144	12724	4677	6237	9745	3737	4978	7817	3100	4129	6482	4231	5637	8849	7691	10255	16023
Debt Recovery Manager	ZAR	31158	41500	65149	83346	111013	174278	95370	127160	198688	81000	108000	168750	73380	97700	153300	53258	70948	111389	92839	123657	194161	112200	149600	233750
	USD	1675	2231	3503	4481	5968	9370	5127	6837	10682	4355	5806	9073	3945	5253	8242	2863	3814	5989	4991	6648	10439	6032	8043	12567
Technology Manager	ZAR	40000	46000	70000	124569	165915	260461	109115	145486	227322	85500	114000	178125	98700	131500	206500	99871	125957	208824	140235	187476	29660	133238	177650	277578
	USD	2151	2473	3763	6697	8920	14003	5866	7822	12222	4597	6129	9577	5306	7070	11102	5369	6772	11227	7540	10079	1595	7163	9551	14924
Finance/Commercial Manager	ZAR	36534	49000	68934	111877	149004	233917	96773	129030	201609	79500	106000	165625	95800	127600	200340	84333	112335	176354	137820	183664	287889	119213	158950	248359
	USD	1964	2634	3706	6015	8011	12576	5203	6937	10839	4274	5699	8905	5151	6860	10771	4534	6040	9481	7410	9874	15478	6409	8546	13353
Key Accounts Manager	ZAR	26275	35000	48600	64943	86343	135547	98175	130900	204531	51000	68000	106250	66300	88300	138700	55032	73300	115102	86700	115500	181300	93968	125290	195766
	USD	1413	1882	2613	3492	4642	7287	5278	7038	10996	2742	3656	5712	3565	4747	7457	2959	3941	6188	4661	6210	9747	5052	6736	10525
QA/Coach	ZAR	11750	16100	30000	42500	46700	88800	75735	100980	157781	40500	54000	84375	28031	37300	58600	30700	41300	64700	41200	54890	86170	64515	86020	134406
	USD	632	866	1613	2285	2511	4774	4072	5429	8483	2177	2903	4536	1507	2005	3151	1651	2220	3478	2215	2951	4633	3469	4625	7226
Executive/Director	ZAR	90000	120000	200000	153373	204412	319526	179520	239360	374000	123000	164000	256250	132600	176690	277200	126370	160702	250170	174087	231857	363977	199155	265540	414906
	USD	4839	6452	10753	8246	10990	17179	9652	12869	20108	6613	8817	13777	7129	9499	14903	6794	8640	13450	9360	12465	19569	10707	14276	22307

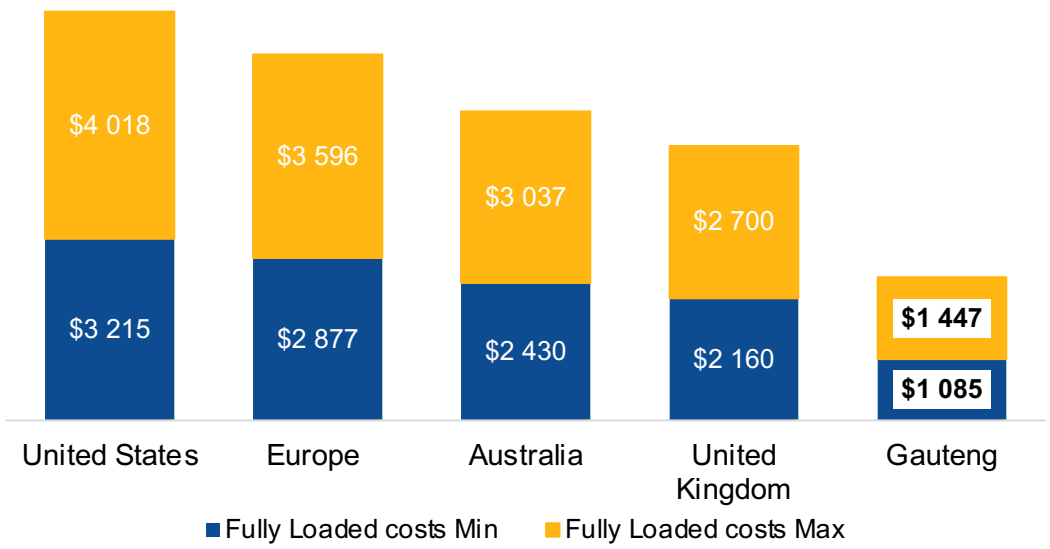
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Call/Contact Centre
Source Market Salary and Fully loaded Costs Comparisons

Est. Call/Contact Centre Salary Comparisons in USD (Entry Level)



Est. Fully Loaded Full-time Inbound/Outbound Customer Service Agent Monthly Cost in USD (per seat)



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Call/Contact Centre
Competitor Market Salary Comparisons

Est. Call/Contact Centre Salary Comparisons

Comparison Locations		Gauteng			Egypt			Ghana			India			Jamaica			Kenya		
Contact Centre Salaries	Currency	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
Inbound Customer Service Agent	ZAR	7900	10500	13700	3703	4937	7714	2384	3558	4967	3324	4432	6925	6171	8228	12856	4712	6283	9818
	USD	425	565	1223	198	264	413	128	190	266	178	237	370	330	440	688	252	336	525
Outbound Customer Service Agent	ZAR	7900	10500	13700	3703	4937	7714	2384	3558	4967	3086	4114	6428	5891	7854	12272	4558	6078	9496
	USD	425	565	1223	198	264	413	128	190	266	165	220	344	315	420	656	244	325	508
Inbound Sales Agent	ZAR	7000	9200	12330	3534	4712	7363	2034	2712	4237	3071	4095	6399	5259	7013	10957	3647	4862	7597
	USD	376	495	1101	189	252	394	109	145	227	164	219	5785	281	375	586	195	260	406
Outbound Sales Agent	ZAR	7300	9500	12480	3366	4488	7013	1978	2637	4120	2777	3703		4769	6358	9934	3436	4582	7159
	USD	392	511	1114	180	240	375	106	141	220	149	198	309	255	340	531	184	245	383
Debt Recovery Agent	ZAR	8200	10800	13900	2665	3553	5552	3394	4525	7071	3366	4488	7013	6311	8415	13148	4208	5610	8766
	USD	441	581	1241	143	190	297	182	242	378	180	240	375	338	450	703	225	300	469
Team Leader	ZAR	13800	17500	22000	8177	10902	17035	6732	8976	14025	6886	9182	14346	9425	12566	19635	11753	15671	24485
	USD	742	941	1964	437	583	911	360	480	750	368	491	767	504	672	1050	629	838	1309
Team Supervisor/Manager	ZAR	16500	21400	28100	8976	11968	18700	7290	9760	15120	7433	9911	15486	10519	14025	21914	13184	17578	27466
	USD	887	1151	2509	480	640	1000	384	515	797	398	530	828	563	750	1172	705	940	1469
Contact Centre Manager	ZAR	38000	45200	55800	13871	18494	28897	9677	12903	20161	10883	14511	22674	18990	25320	39562	20603	27470	42922
	USD	2043	2430	4982	742	989	1545	518	690	1078	582	776	1213	1016	1354	2116	1102	1469	2295
Debt Recovery Manager	ZAR	31158	41500	54000	17531	23375	36523	10379	13838	21622	9818	13090	20453	30518	40691	63580	19509	26012	40643
	USD	1675	2231	4821	938	1250	1953	555	740	1156	525	700	1094	1632	2176	3400	1043	1391	2173
Technology Manager	ZAR	40000	46000	60000	23843	31790	49672	9537	12716	19869	10940	14586	22791	20056	26741	41783	35427	47236	73807
	USD	2151	2473	5357	1275	1700	2656	510	680	1063	585	780	1219	1073	1430	2234	1895	2526	3947
Finance/Commercial Manager	ZAR	36534	49000	62995	12482	16643	26005	10238	13651	21330	11921	15895	24836	28373	37830	59110	29453	39270	61359
	USD	1964	2634	5625	668	890	1391	548	730	1141	638	850	1328	1517	2023	3161	1575	2100	3281
Key Accounts Manager	ZAR	26275	35000	43956	11781	15708	24544	6592	8789	13733	11781	15708	24544	11921	15895	24836	16830	22440	35063
	USD	1413	1882	3925	630	840	1313	353	470	734	630	840	1313	638	850	1328	900	1200	1875
QA/Coach	ZAR	11750	16100	20500	7391	9855	15398	4769	6358	9934	4909	6545	10227	7041	9387	14668	9172	12230	19109
	USD	632	866	1830	395	527	823	255	340	531	263	350	547	377	502	784	491	654	1022
Executive/Director	ZAR	90000	120000	160000	56100	74800	116875	28050	37400	58438	30855	41140	64281	47685	63580	99344	56100	74800	116875
	USD	4839	6452	14286	3000	4000	6250	1500	2000	3125	1650	2200	3438	2550	3400	5313	3000	4000	6250

Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Call/Contact Centre
Competitor Market Salary Comparisons

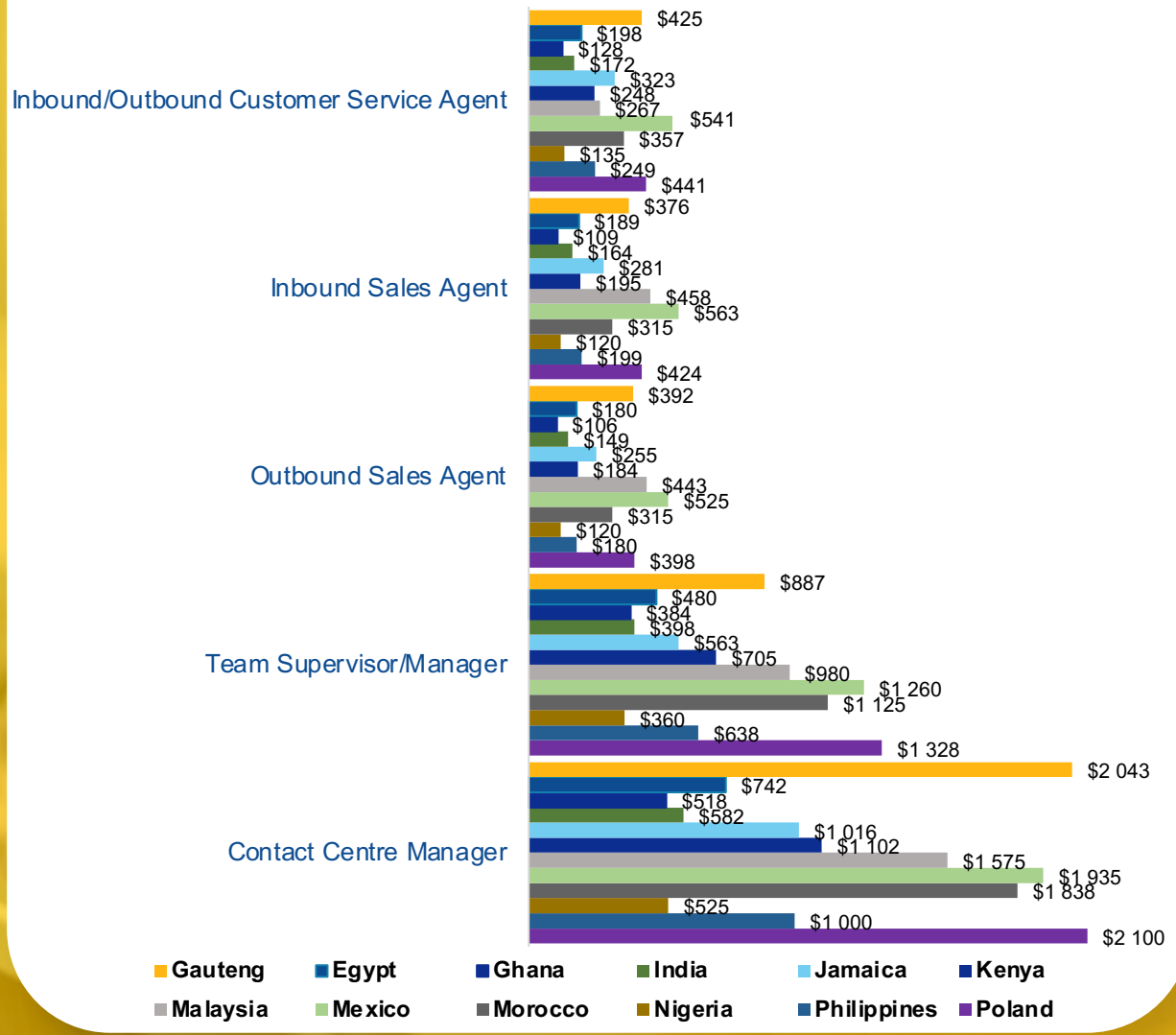
Est. Call/Contact Centre Salary Comparisons

Comparison Locations		Gauteng			Malaysia			Mexico			Morocco			Nigeria			Philippines			Poland		
Contact Centre Salaries	Currency	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
Inbound Customer Service Agent	ZAR	7900	10500	13700	7952	10603	16567	10238	13651	21330	6732	8976	14025	2525	3366	5259	4769	6358	9934	8345	11127	17385
	USD	425	565	1223	425	567	886	548	730	1141	360	480	750	135	180	281	255	340	531	446	595	930
Outbound Customer Service Agent	ZAR	7900	10500	13700	7952	10603	16567	9958	13277	20745	6592	8789	13733	2525	3366	5259	4516	6021	9408	8135	10846	16947
	USD	425	565	1223	425	567	886	533	710	1109	353	470	734	135	180	281	242	322	503	435	580	906
Inbound Sales Agent	ZAR	7000	9200	12330	8555	11407	17823	10519	14025	21914	5891	7854	12272	2244	2992	4675	3717	4956	7743	7924	10566	16509
	USD	376	495	1101	458	610	953	563	750	1172	315	420	656	120	160	250	199	265	414	424	565	883
Outbound Sales Agent	ZAR	7300	9500	12480	8275	11033	17239	9818	13090	20453	5891	7854	12272	2244	2992	4675	3366	4488	7013	7433	9911	15486
	USD	392	511	1114	443	590	922	525	700	1094	315	420	656	120	160	250	180	240	375	398	530	828
Debt Recovery Agent	ZAR	8200	10800	13900	8135	10846	16947	10799	14399	22498	9986	13314	20804	2805	3740	5844	5470	7293	11395	8976	11968	18700
	USD	441	581	1241	435	580	906	578	770	1203	534	712	1113	150	200	313	293	390	609	480	640	1000
Team Leader	ZAR	13800	17500	22000	17251	23001	35939	19635	26180	40906	14726	19635	30680	5610	7480	11688	9958	13277	20745	15989	21318	33309
	USD	742	941	1964	923	1230	1922	1050	1400	2188	788	1050	1641	300	400	625	533	710	1109	855	1140	1781
Team Supervisor/Manager	ZAR	16500	21400	28100	18317	24422	38160	23562	31416	49088	21038	28050	43828	6732	8976	14025	11921	15895	24836	24824	33099	51717
	USD	887	1151	2509	980	1306	2041	1260	1680	2625	1125	1500	2344	360	480	750	638	850	1328	1328	1770	2766
Contact Centre Manager	ZAR	38000	45200	55800	29453	39270	61359	36185	48246	75384	34361	45815	71586	9818	13090	20453	18695	24927	38949	39270	52360	81813
	USD	2043	2430	4982	1575	2100	3281	1935	2580	4031	1838	2450	3828	525	700	1094	1000	1333	2083	2100	2800	4375
Debt Recovery Manager	ZAR	31158	41500	54000	25245	33660	52594	36465	48620	75969	35063	46750	73047	9397	12529	19577	17952	23936	37400	36465	48620	75969
	USD	1675	2231	4821	1350	1800	2813	1950	2600	4063	1875	2500	3906	503	670	1047	960	1280	2000	1950	2600	4063
Technology Manager	ZAR	40000	46000	60000	34081	45441	71002	43478	57970	90578	39971	53295	83273	11921	15895	24836	25105	33473	52302	44880	59840	93500
	USD	2151	2473	5357	1823	2430	3797	2325	3100	4844	2138	2850	4453	638	850	1328	1343	1790	2797	2400	3200	5000
Finance/Commercial Manager	ZAR	36534	49000	62995	26648	35530	55516	37166	49555	77430	38849	51799	80936	9537	12716	19869	19635	26180	40906	46283	61710	96422
	USD	1964	2634	5625	1425	1900	2969	1988	2650	4141	2078	2770	4328	510	680	1063	1050	1400	2188	2475	3300	5156
Key Accounts Manager	ZAR	26275	35000	43956	17672	23562	36816	30855	41140	64281	15428	20570	32141	6872	9163	14317	12623	16830	26297	22440	29920	46750
	USD	1413	1882	3925	945	1260	1969	1650	2200	3438	825	1100	1719	368	490	766	675	900	1406	1200	1600	2500
QA/Coach	ZAR	11750	16100	20500	15442	20589	32170	15428	20570	32141	12763	17017	26589	4628	6171	9642	8345	11127	17385	15512	20682	32316
	USD	632	866	1830	826	1101	1720	825	1100	1719	683	910	1422	248	330	516	446	595	930	830	1106	1728
Executive/Director	ZAR	90000	120000	160000	68723	91630	143172	98175	130900	204531	54137	72182	112784	28050	37400	58438	36465	48620	75969	77138	102850	160703
	USD	4839	6452	14286	3675	4900	7656	5250	7000	10938	2895	3860	6031	1500	2000	3125	1950	2600	4063	4125	5500	8594

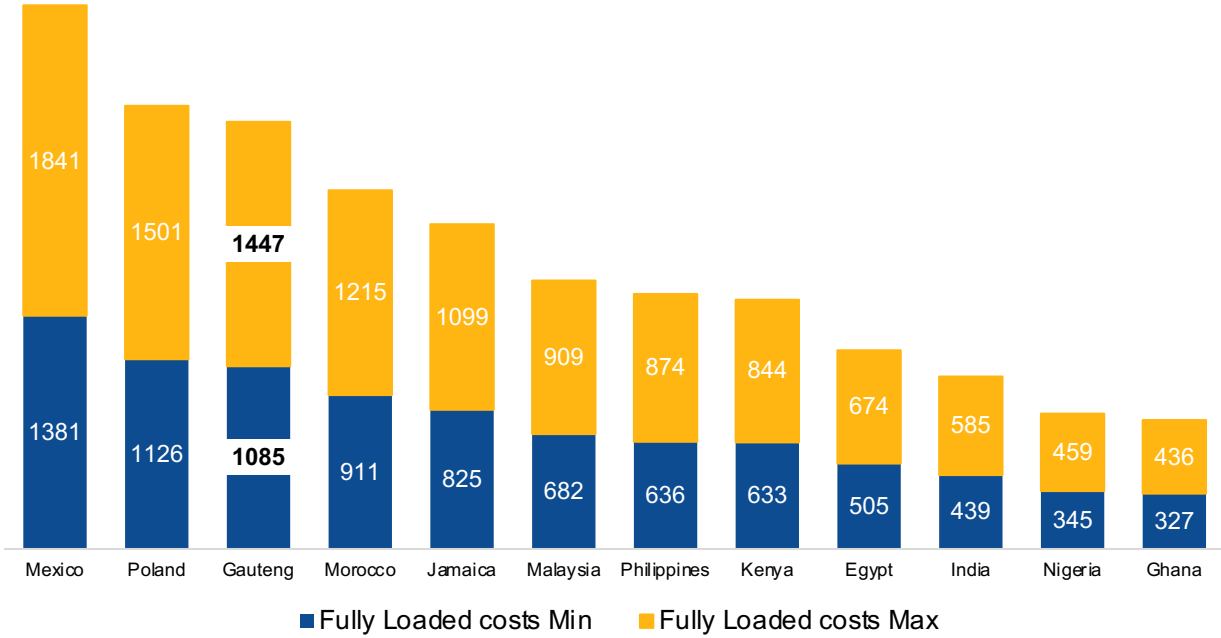
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Call/Contact Centre
Competitor Market Salary and Fully loaded Costs Comparisons

Est. Call/Contact Centre Salary Comparisons in USD (Entry Level)



Est. Fully Loaded Full-time Inbound/Outbound Customer Service Agent Monthly Cost in USD (per seat)



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Digital and ITO
Provincial Salary Comparisons

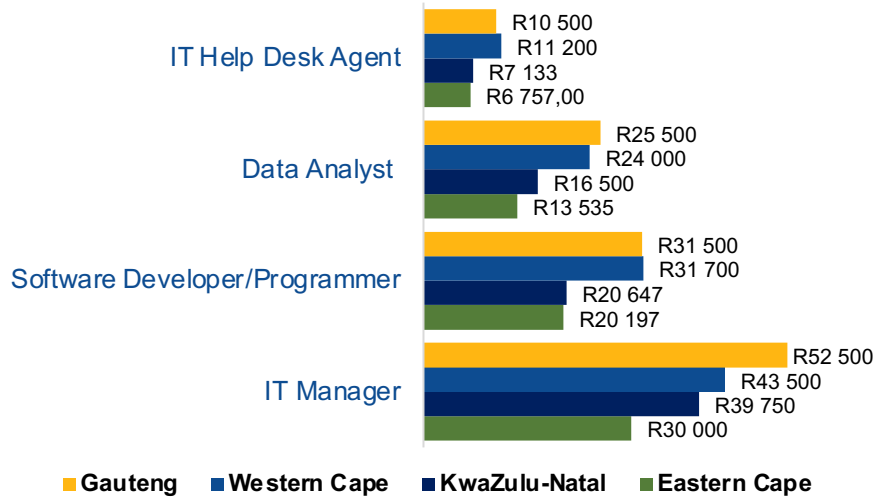
Est. Digital and ITO Salary Comparisons

Comparison Locations		Eastern Cape			Gauteng			KwaZulu-Natal			Western Cape		
Digital and ITO	**Currency**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**
IT Help Desk Agent	ZAR	6757	9000	14129	10500	14000	21970	7133	9500	14900	11200	15000	23500
	USD	363	484	760	565	753	1181	383	511	801	602	806	1263
Technical Support Specialist	ZAR	8259	11000	17268	11600	15500	24300	7508	10000	15699	11938	15900	24960
	USD	444	591	928	624	833	1306	404	538	844	642	855	1342
Software Developer/Programmer	ZAR	20197	26900	42200	31500	42000	65900	20647	27500	43171	31700	42200	66248
	USD	1086	1446	2269	1694	2258	3543	1110	1478	2321	1704	2269	3562
Data Analyst	ZAR	13535	18027	28300	25500	34000	53370	16500	22000	34500	24000	32000	50200
	USD	728	969	1522	1371	1828	2869	887	1183	1855	1290	1720	2699
IT Technician	ZAR	15750	21000	32813	20625	27500	42969	16050	21400	33438	18000	24000	37500
	USD	847	1129	1764	1109	1478	2310	863	1151	1798	968	1290	2016
Network Engineer	ZAR	21000	28000	43750	33000	44000	68750	21900	29200	45625	32850	43800	68438
	USD	1129	1505	2352	1774	2366	3696	1177	1570	2453	1766	2355	3679
Insights Analyst	ZAR	14850	19800	30938	26250	35000	54688	19500	26000	40625	25950	34600	54063
	USD	798	1065	1663	1411	1882	2940	1048	1398	2184	1395	1860	2907
IT Manager	ZAR	30000	40000	62500	52500	70000	109375	39750	53000	82813	43500	58000	90625
	USD	1613	2151	3360	2823	3763	5880	2137	2849	4452	2339	3118	4872
Solutions/Systems Engineer	ZAR	24000	32000	50000	39000	52000	81250	26400	35200	55000	35325	47100	73594
	USD	1290	1720	2688	2097	2796	4368	1419	1892	2957	1899	2532	3957

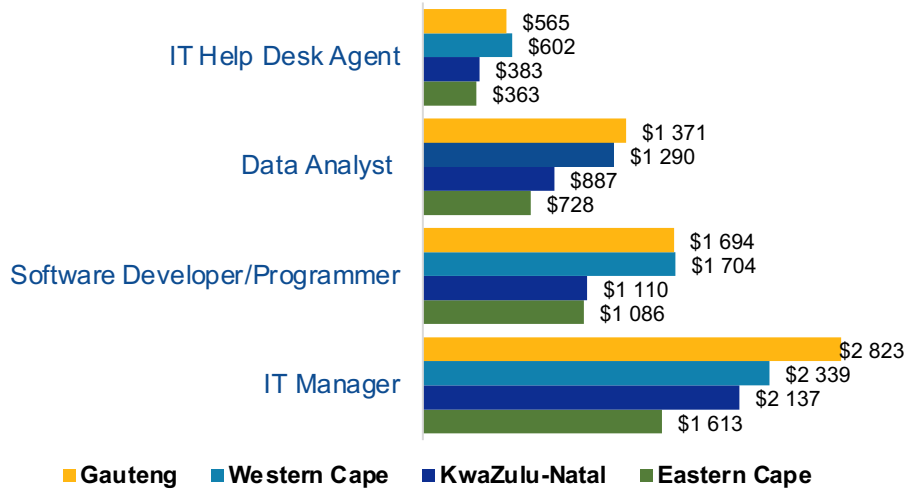
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Digital and ITO
Provincial Salary and Fully loaded Costs Comparisons

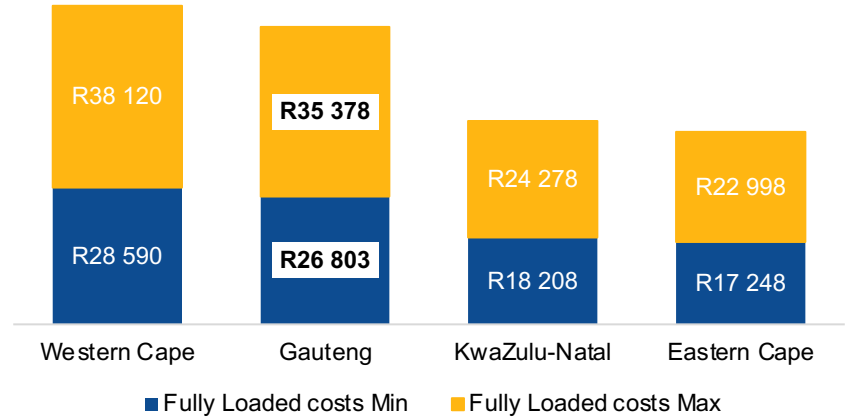
Est. Digital and ITO Salary Comparisons in ZAR (Entry Level)



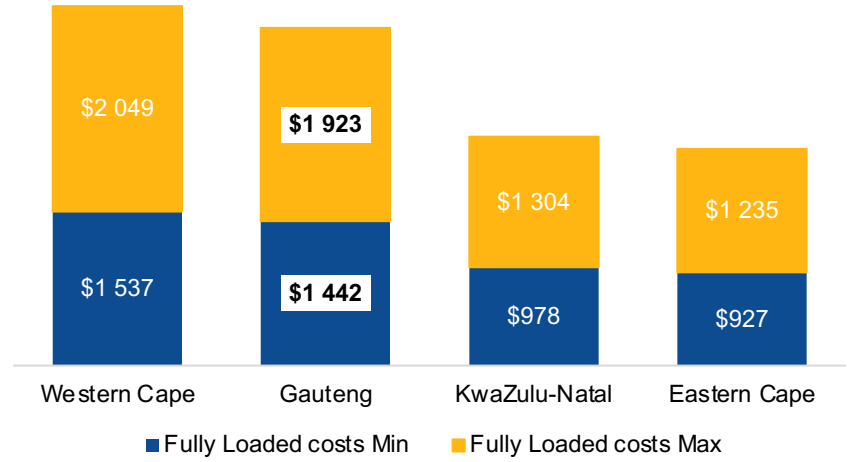
Est. Digital and ITO Salary Comparisons in USD (Entry Level)



Est. Fully Loaded Full-time IT Help Desk Agent Monthly Cost in ZAR (per seat)



Est. Fully Loaded Full-time IT Help Desk Agent Monthly Cost in USD (per seat)



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Digital and ITO
Source Market Salary Comparisons

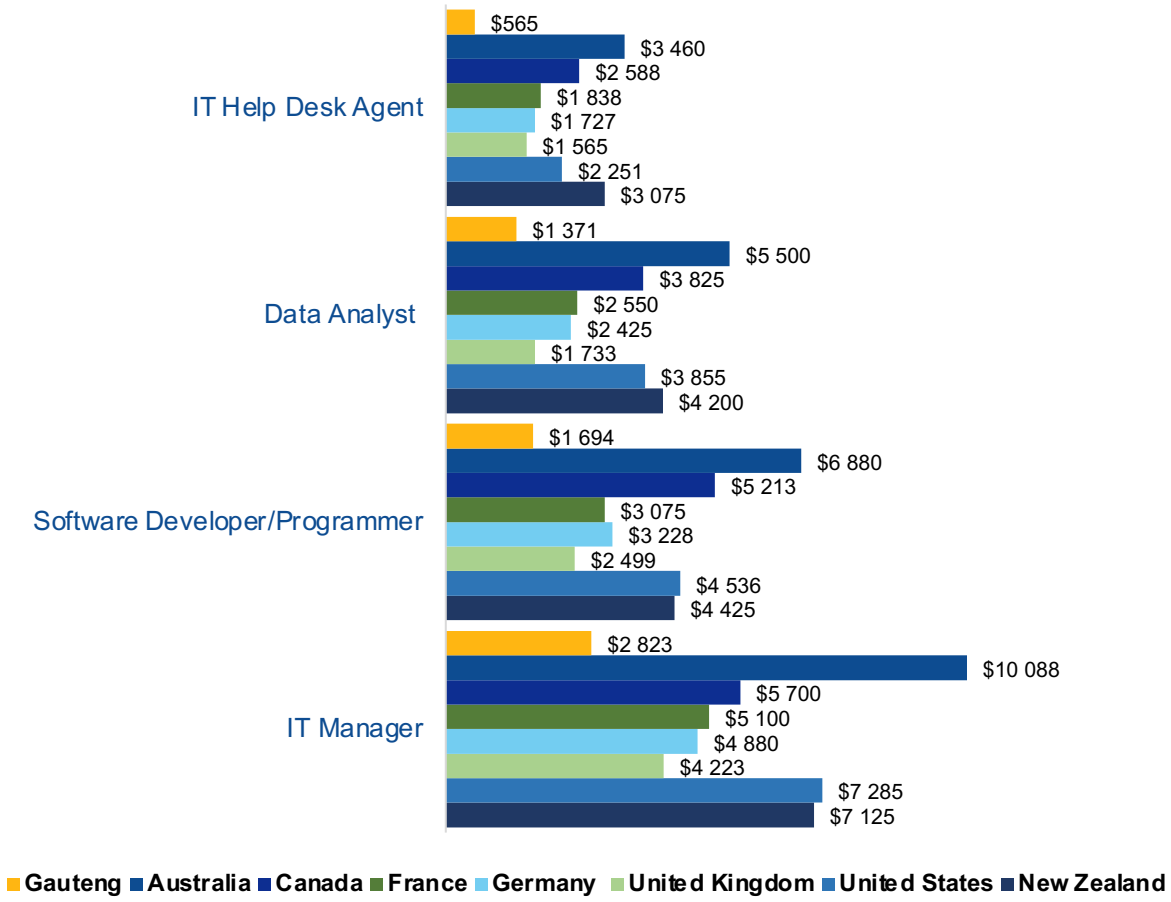
Est. Digital and ITO Salary Comparisons

Comparison Locations		Gauteng			Australia			Canada			France			Germany			United Kingdom			United States			New Zealand		
Digital and ITO	Currency	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	Entry Level	Intermediate	Senior
IT Help Desk Agent	ZAR	10500	14000	21970	42678	56876	89292	48386	64515	100805	36750	49000	76563	33800	45100	70800	37011	49309	77334	43493	57927	90926	57503	76670	119797
	USD	565	753	1181	3460	4611	7239	2588	3450	5391	1838	2450	3828	1727	2300	3611	1565	2085	3270	2251	2998	4706	3075	4100	6406
Technical Support Specialist	ZAR	11600	15500	24300	47218	62895	98740	52594	70125	109570	39000	52000	81250	36800	49000	77028	47772	63617	99871	48304	64340	101012	61710	82280	128563
	USD	624	833	1306	3828	5099	8005	2813	3750	5859	1950	2600	4063	1877	2500	3925	2020	2690	4223	2500	3330	5228	3300	4400	6875
Software Developer/Programmer	ZAR	31500	42000	65900	84863	113073	177498	97474	129965	203070	61500	82000	128125	63300	84300	132450	59100	78729	123592	88164	116721	183244	82748	110330	172391
	USD	1694	2258	3543	6880	9167	14390	5213	6950	10859	3075	4100	6406	3228	4300	6750	2499	3329	5226	4536	6041	9484	4425	5900	9219
Data Analyst	ZAR	25500	34000	53370	67841	90451	141850	71528	95370	149016	51000	68000	106250	47600	63400	99500	40984	54583	85682	74484	99196	155730	78540	104720	163625
	USD	1371	1828	2869	5500	7333	11500	3825	5100	7969	2550	3400	5313	2425	3230	5071	1733	2308	3623	3855	5134	8060	4200	5600	8750
IT Technician	ZAR	20625	27500	42969	50936	67915	106117	58905	78540	122719	43500	58000	90625	51100	68100	106900	40328	53770	84016	52981	70641	110377	68723	91630	143172
	USD	1109	1478	2310	4275	5700	8906	3150	4200	6563	2175	2900	4531	2605	3469	5446	1763	2350	3672	2888	3850	6016	3675	4900	7656
Network Engineer	ZAR	33000	44000	68750	83966	111954	174928	98175	130900	204531	59250	79000	123438	73600	98100	154000	57128	76170	119016	96329	128438	200684	89760	119680	187000
	USD	1774	2366	3696	7050	9400	14688	5250	7000	10938	2963	3950	6172	3754	5000	7849	2497	3329	5202	5250	7000	10938	4800	6400	10000
Insights Analyst	ZAR	26250	35000	54688	67887	90516	141431	86254	115005	179695	48000	64000	100000	69900	93170	146200	38955	51940	81156	75686	100915	157680	74333	99110	154859
	USD	1411	1882	2940	5700	7600	11875	4613	6150	9609	2400	3200	5000	3566	4750	7457	1703	2270	3547	4125	5500	8594	3975	5300	8281
IT Manager	ZAR	52500	70000	109375	124436	165915	259242	106590	142120	222063	102000	136000	212500	95700	127500	200100	99871	125957	208824	140235	187476	29660	133238	177650	277578
	USD	2823	3763	5880	10088	13451	21017	5700	7600	11875	5100	6800	10625	4880	6500	10204	4223	5625	8830	7285	9703	15232	7125	9500	14844
Solutions/Systems Engineer	ZAR	39000	52000	81250	84860	113146	176791	89059	118745	185539	93000	124000	193750	91300	121600	190940	78065	104086	162634	105934	141245	220695	100980	134640	210375
	USD	2097	2796	4368	7125	9500	14844	4763	6350	9922	4650	6200	9688	4655	6200	9733	3415	4548	7140	5780	7698	12085	5400	7200	11250

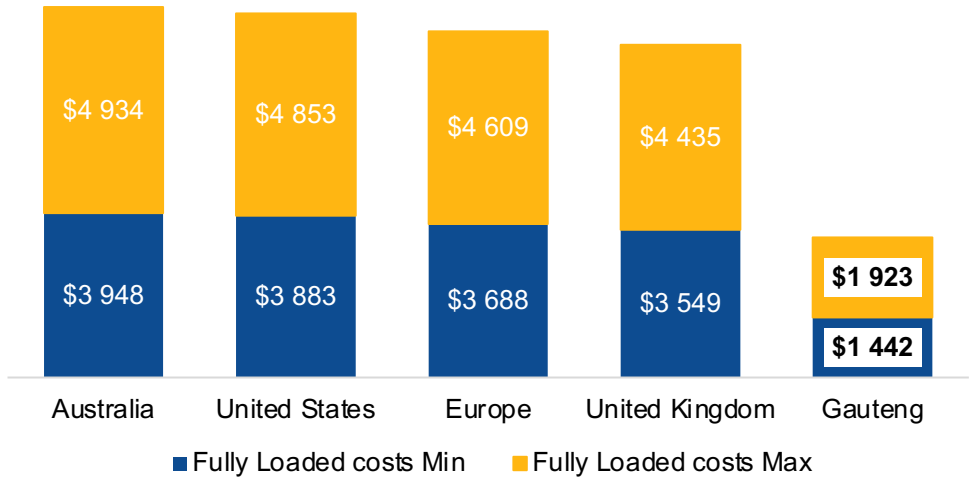
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Digital and ITO
Source Market Salary and Fully loaded Costs Comparisons

Est. Digital and ITO Salary Comparisons in USD (Entry Level)



Est. Fully Loaded Full-time IT Help Desk Agent Monthly Cost in USD (per seat)



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Digital and ITO
Competitor Market Salary Comparisons

Est. Digital and ITO Salary Comparisons

Comparison Locations	Gauteng				Egypt			Ghana			India			Jamaica			Kenya		
Digital and ITO	**Currency**	**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	ZAR	10500	14000	21970	5442	7256	11337	3927	5236	8181	3829	5105	7977	7125	9500	14843	5905	7873	12301
	USD	565	753	1181	291	388	606	210	280	438	205	273	429	381	508	797	316	421	658
Technical Support Specialist	ZAR	11600	15500	24300	7714	10285	16070	4488	5984	9350	4853	6470	10110	7251	9668	15106	7966	10622	16596
	USD	624	833	1306	413	550	859	240	320	500	260	346	541	388	517	808	426	568	888
Software Developer/Programmer	ZAR	31500	42000	65900	8611	11482	17940	6872	9163	14317	7195	9593	14989	12033	16045	25070	15932	21243	33193
	USD	1694	2258	3543	461	614	959	368	490	766	385	513	802	644	858	1341	852	1136	1775
Data Analyst	ZAR	25500	34000	53370	7223	9631	15048	5077	6769	10577	6844	9126	14259	9509	12679	19810	11038	14717	22995
	USD	1371	1828	2869	386	515	805	272	362	566	366	488	763	509	678	1059	590	787	1230
IT Technician	ZAR	20625	27500	42969	8345	11127	17385	4769	6358	9934	7153	9537	14902	8415	11220	17531	9116	12155	18992
	USD	1109	1478	2310	446	595	930	255	340	531	383	510	797	450	600	938	488	650	1016
Network Engineer	ZAR	33000	44000	68750	9944	13258	20716	5470	7293	11395	8948	11931	18642	13155	17541	27407	19495	25993	40614
	USD	1774	2366	3696	532	709	1108	293	390	609	479	638	997	704	938	1466	1043	1390	2172
Insights Analyst	ZAR	26250	35000	54688	9116	12155	18992	5189	6919	10811	7013	9350	14609	9818	13090	20453	11220	14960	23375
	USD	1411	1882	2940	488	650	1016	278	370	578	375	500	781	525	700	1094	600	800	1250
IT Manager	ZAR	52500	70000	109375	23843	31790	49672	17812	23749	37108	10940	14586	22791	23618	31491	49204	28345	37793	59051
	USD	2823	3763	5880	1275	1700	2656	953	1270	1984	585	780	1219	1263	1684	2631	1516	2021	3158
Solutions/Systems Engineer	ZAR	39000	52000	81250	12160	16213	25333	7854	10472	16363	9074	12099	18905	13240	17653	27583	19719	26292	41082
	USD	2097	2796	4368	650	867	1355	420	560	875	485	647	1011	708	944	1475	1055	1406	2197

Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Digital and ITO
Competitor Market Salary Comparisons

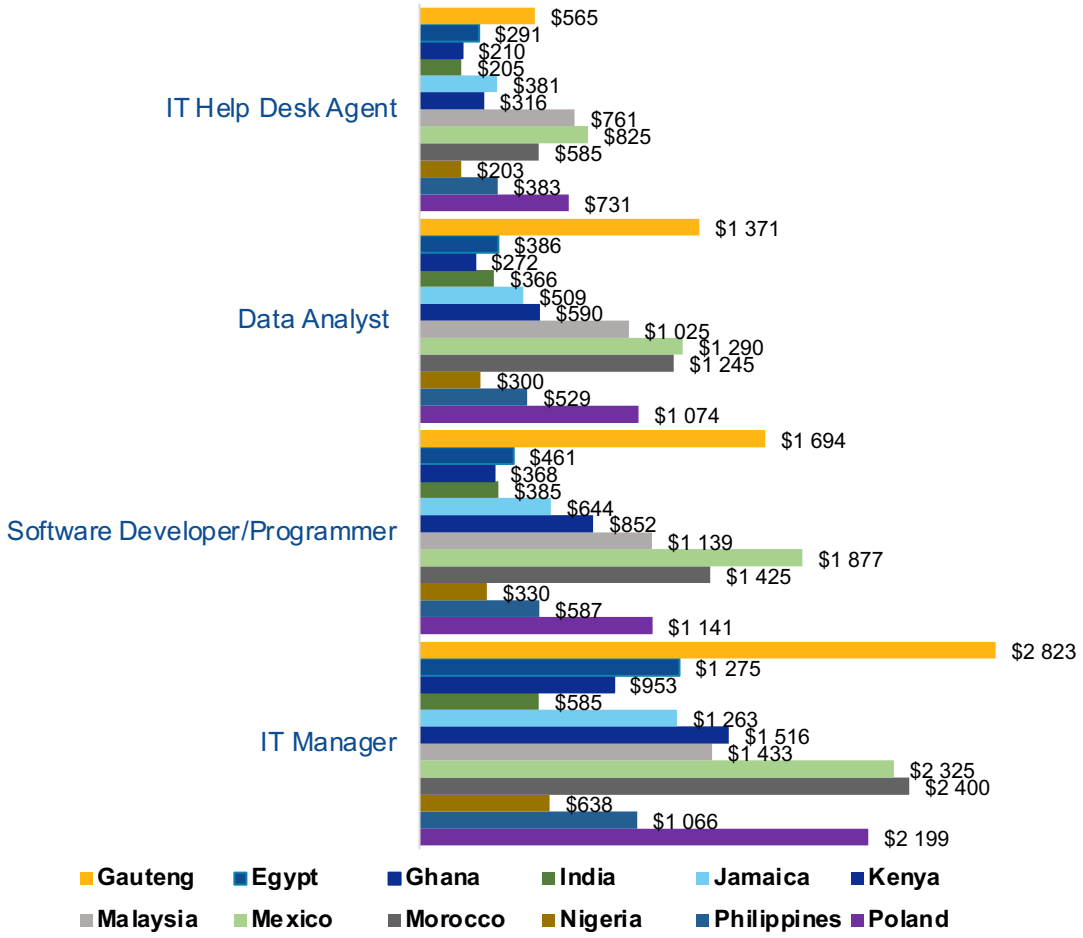
Est. Digital and ITO Salary Comparisons

Comparison Locations		Gauteng			Malaysia			Mexico			Morocco			Nigeria			Philippines			Poland		
Digital and ITO	Currency	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	ZAR	10500	14000	21970	14221	18962	29628	15428	20570	32141	10940	14586	22791	3787	5049	7889	7167	9556	14931	13674	18233	28488
	USD	565	753	1181	761	1014	1584	825	1100	1719	585	780	1219	203	270	422	383	511	798	731	975	1523
Technical Support Specialist	ZAR	11600	15500	24300	16073	21430	33485	17391	23188	36231	14867	19822	30972	4488	5984	9350	7924	10566	16509	15778	21038	32871
	USD	624	833	1306	860	1146	1791	930	1240	1938	795	1060	1656	240	320	500	424	565	883	844	1125	1758
Software Developer/Programmer	ZAR	31500	42000	65900	21304	28405	44383	26648	35530	55516	26648	35530	55516	6171	8228	12856	10982	14642	22878	21332	28443	44442
	USD	1694	2258	3543	1139	1519	2373	1877	2500	3925	1425	1900	2969	330	440	688	587	783	1223	1141	1521	2377
Data Analyst	ZAR	25500	34000	53370	19172	25563	39942	35299	47016	73816	23282	31042	48503	5610	7480	11688	9888	13184	20599	20084	26778	41841
	USD	1371	1828	2869	1025	1367	2136	1290	1720	2688	1245	1660	2594	300	400	625	529	705	1102	1074	1432	2238
IT Technician	ZAR	20625	27500	42969	16830	22440	35063	18513	24684	38569	19635	26180	40906	4769	6358	9934	8976	11968	18700	17321	23095	36085
	USD	1109	1478	2310	900	1200	1875	990	1320	2063	1050	1400	2188	255	340	531	480	640	1000	926	1235	1930
Network Engineer	ZAR	33000	44000	68750	26157	34876	54493	26227	34969	54639	29453	39270	61359	6452	8602	13441	12623	16830	26297	28050	37400	58438
	USD	1774	2366	3696	1399	1865	2914	1403	1870	2922	1575	2100	3281	345	460	719	675	900	1406	1500	2000	3125
Insights Analyst	ZAR	26250	35000	54688	19495	25993	40614	21599	28798	44997	25245	33660	52594	6311	8415	13148	10098	13464	21038	21038	28050	43828
	USD	1411	1882	2940	1043	1390	2172	1155	1540	2406	1350	1800	2813	338	450	703	540	720	1125	1125	1500	2344
IT Manager	ZAR	52500	70000	109375	26802	35736	55837	43478	57970	90578	44880	59840	93500	11921	15895	24836	19930	26573	41520	41121	54828	85669
	USD	2823	3763	5880	1433	1911	2986	2325	3100	4844	2400	3200	5000	638	850	1328	1066	1421	2220	2199	2932	4581
Solutions/Systems Engineer	ZAR	39000	52000	81250	26760	35680	55749	29453	39270	61359	39270	52360	81813	7854	10472	16363	13955	18607	29073	28260	37681	58876
	USD	2097	2796	4368	1431	1908	2981	1575	2100	3281	2100	2800	4375	420	560	875	746	995	1555	1511	2015	3148

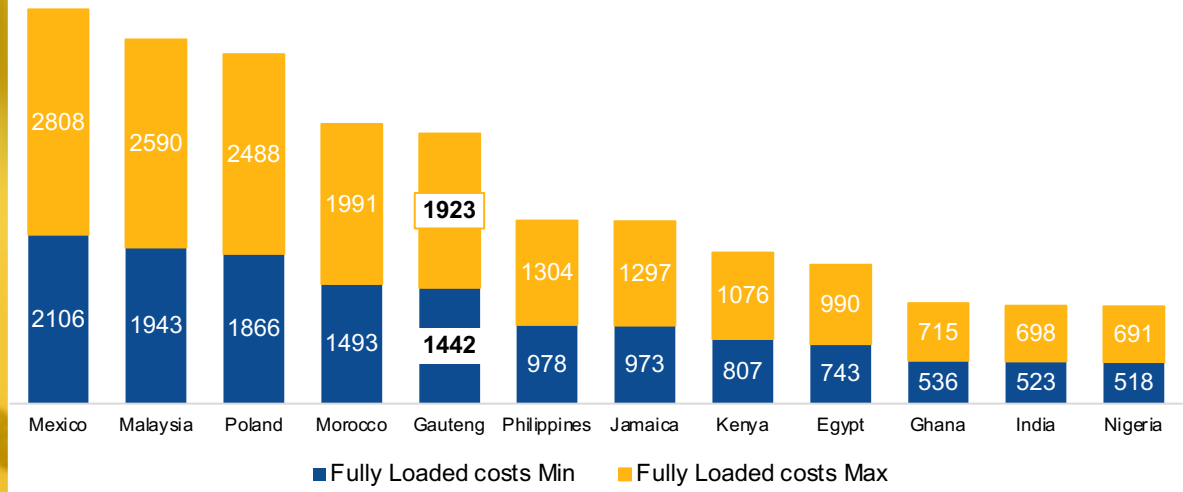
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Digital and ITO
Competitor Salary and Fully loaded Costs Comparisons

Est. Digital and ITO Salary Comparisons in USD (Entry Level)



Est. Fully Loaded Full-time IT Help Desk Agent Monthly Cost in USD (per seat)



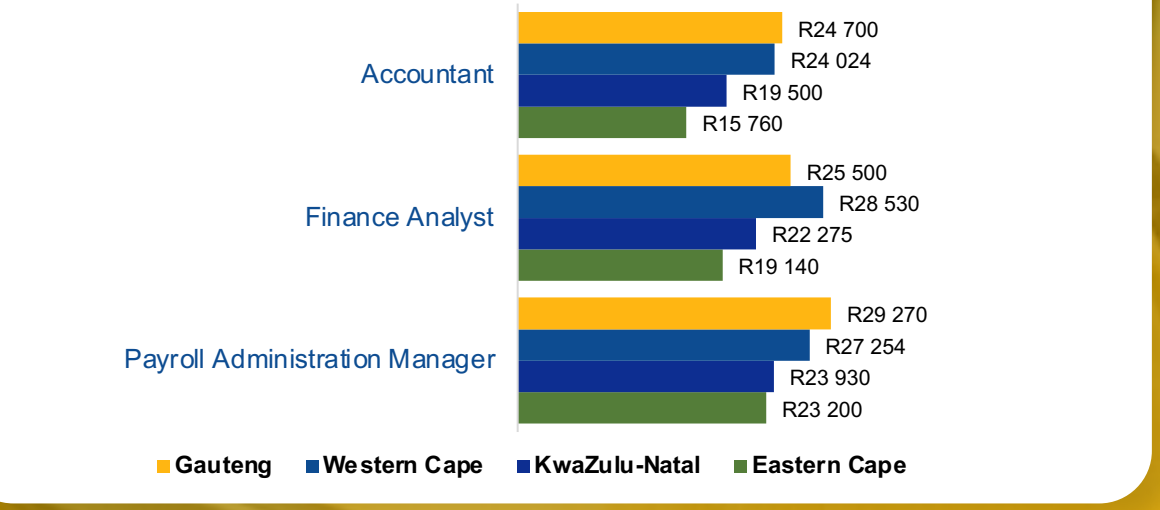
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Finance & Accounting
Provincial Salary Comparisons

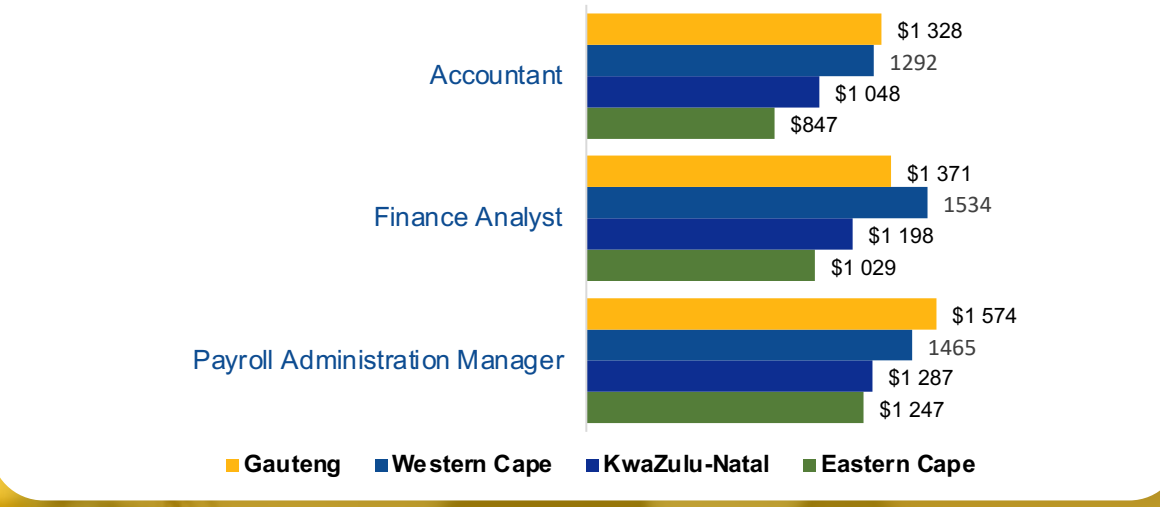
Est. Finance & Accounting Salary Comparisons

Comparison Locations		Eastern Cape			Gauteng			KwaZulu-Natal			Western Cape		
Finance & Accounting	**Currency**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**
Accountant	ZAR	15760	21000	32900	24700	33000	51800	19500	26000	40800	24024	32000	50230
	USD	847	1129	1769	1328	1774	2785	1048	1398	2194	1292	1720	2701
Finance Analyst	ZAR	19140	25500	40030	25500	34000	53125	22275	29700	46406	28530	38000	59600
	USD	1029	1371	2152	1371	1828	2856	1198	1597	2495	1534	2043	3204
Finance Manager	ZAR	26200	35000	54900	31500	42000	65900	30030	40000	62794	33030	44000	69070
	USD	1409	1882	2952	1694	2258	3543	1615	2151	3376	1776	2366	3713
Payroll Administration Manager	ZAR	23200	30900	48500	29270	38995	61200	23930	31880	50040	27254	36300	56900
	USD	1247	1661	2608	1574	2097	3290	1287	1714	2690	1465	1952	3059

Est. Finance & Accounting Salary Comparisons in ZAR (Entry Level)



Est. Finance & Accounting Salary Comparisons in USD (Entry Level)



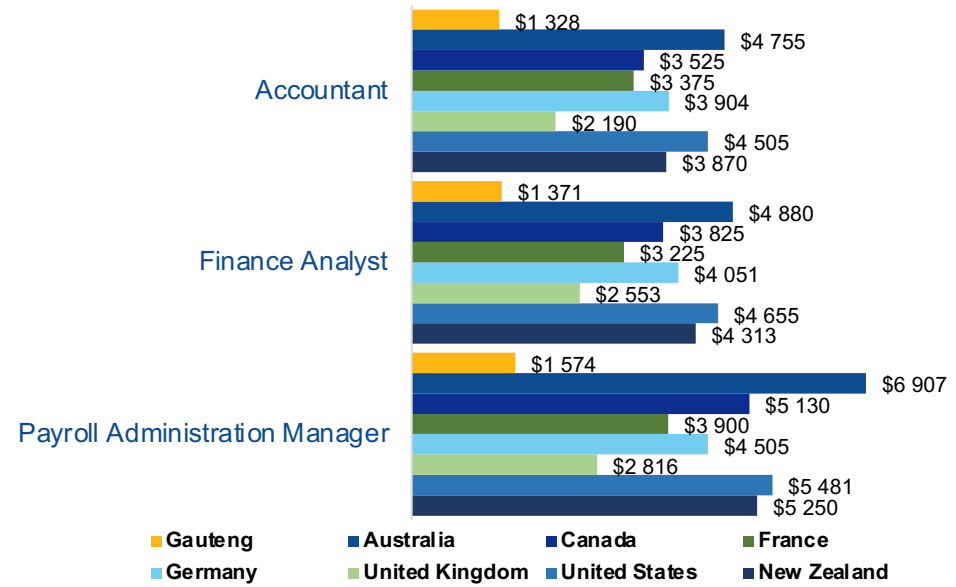
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Finance & Accounting
Source Market Salary Comparisons

Est. Finance & Accounting Salary Comparisons

Comparison Locations	Gauteng				Australia			Canada			France			Germany			United Kingdom			United States			New Zealand		
Finance & Accounting	Currency	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	Entry Level	Intermediate	Senior
Accountant	ZAR	24700	33000	51800	58565	77999	122450	65918	87890	137328	67500	90000	140625	76500	102000	160200	51743	68917	108191	87205	116137	182316	72369	96492	150769
	USD	1328	1774	2785	4755	6333	9942	3525	4700	7344	3375	4500	7031	3904	5200	8163	2190	2917	4579	4505	6000	9419	3870	5160	8063
Finance Analyst	ZAR	25500	34000	53125	60094	80043	125601	71528	95370	149016	64500	86000	134375	79500	105900	166376	60321	80324	126119	90103	120008	188392	80644	107525	168008
	USD	1371	1828	2856	4880	6500	10200	3825	5100	7969	3225	4300	6719	4051	5400	8477	2553	3400	5338	4655	6200	9733	4313	5750	8984
Finance Manager	ZAR	31500	42000	65900	111687	148714	233494	98175	130900	204531	79500	106000	165625	92800	123500	194000	84252	112227	176183	138069	183886	288681	119213	158950	248359
	USD	1694	2258	3543	9070	12080	18964	5250	7000	10938	3975	5300	8281	4730	6300	9890	3566	4750	7457	7133	9500	14914	6375	8500	13281
Payroll Administration Manager	ZAR	29270	38995	61200	85042	113275	177824	95931	127908	199856	78000	104000	162500	88300	117700	184760	66527	88593	139080	106092	141301	221824	98175	130900	204531
	USD	1574	2097	3290	6907	9200	14443	5130	6840	10688	3900	5200	8125	4505	6000	9419	2816	3750	5887	5481	7300	11460	5250	7000	10938

Est. Finance & Accounting Salary Comparisons in USD (Entry Level)



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Finance & Accounting
Competitor Market Salary Comparisons

Est. Finance & Accounting Salary Comparisons

Comparison Locations	Gauteng				Egypt			Ghana			India			Jamaica			Kenya		
Finance & Accounting	Currency	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
Accountant	ZAR	24700	33000	51800	7013	9350	14609	5891	7854	12272	4208	5610	8766	12623	16830	26297	10463	13950	21797
	USD	1328	1774	2785	375	500	781	315	420	656	225	300	469	675	900	1406	560	746	1166
Finance Analyst	ZAR	25500	34000	53125	9397	12529	19577	6241	8322	13002	7013	9350	14609	22300	29733	46458	8275	11033	17239
	USD	1371	1828	2856	503	670	1047	334	445	695	375	500	781	1193	1590	2484	443	590	922
Finance Manager	ZAR	31500	42000	65900	28050	37400	58438	10238	13651	21330	15273	20364	31819	36465	48620	75969	29453	39270	61359
	USD	1694	2258	3543	1500	2000	3125	548	730	1141	817	1089	1702	1950	2600	4063	1575	2100	3281
Payroll Administration Manager	ZAR	29270	38995	61200	28050	37400	58438	7574	10098	15778	15708	20944	32725	34922	46563	72755	25245	33660	52594
	USD	1574	2097	3290	1500	2000	3125	405	540	844	840	1120	1750	1868	2490	3891	1350	1800	2813

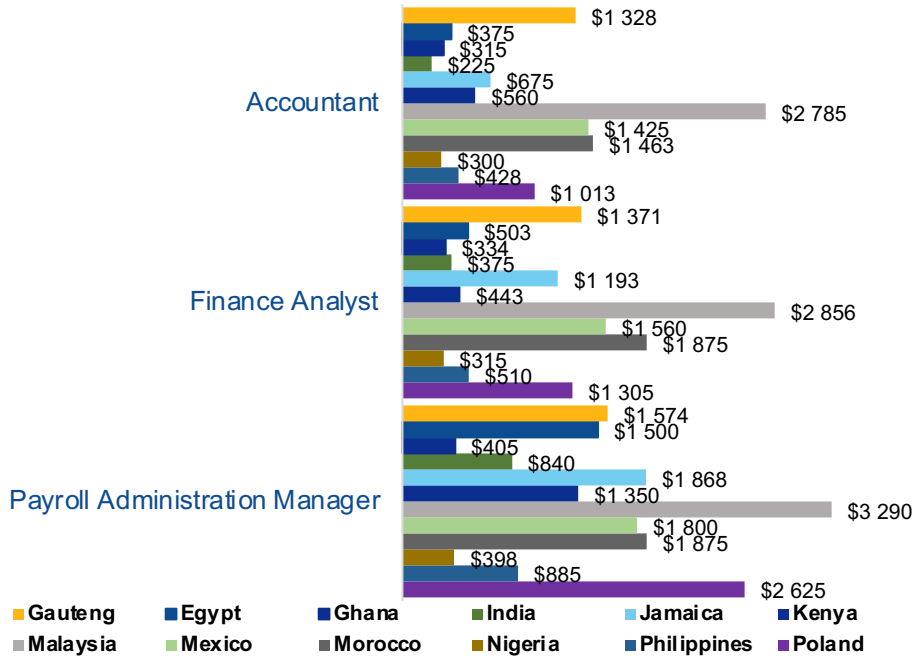
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Finance & Accounting
Competitor Market Salary Comparisons

Est. Finance & Accounting Salary Comparisons

Comparison Locations		Gauteng		Malaysia			Mexico			Morocco			Nigeria			Philippines			Poland		
Finance & Accounting	Currency	Entry Level	Intermediate	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
Accountant	ZAR	24700	33000	51800	16830	26297	26648	35530	55516	27349	36465	56977	5610	7480	11688	7994	10659	16655	18934	25245	39445
	USD	1328	1774	2785	900	1406	1425	1900	2969	1463	1950	3047	300	400	625	428	570	891	1013	1350	2109
Finance Analyst	ZAR	25500	34000	53125	17765	27758	29172	38896	60775	35063	46750	73047	5891	7854	12272	9537	12716	19869	24404	32538	50841
	USD	1371	1828	2856	950	1484	1560	2080	3250	1875	2500	3906	315	420	656	510	680	1063	1305	1740	2719
Finance Manager	ZAR	31500	42000	65900	35530	55516	41514	55352	86488	44880	59840	93500	9537	12716	19869	18233	24310	37984	51893	69190	108109
	USD	1694	2258	3543	1900	2969	2220	2960	4625	2400	3200	5000	510	680	1063	975	1300	2031	2775	3700	5781
Payroll Administration Manager	ZAR	29270	38995	61200	31790	49672	33660	44880	70125	35063	46750	73047	7433	9911	15486	16550	22066	34478	49088	65450	102266
	USD	1574	2097	3290	1700	2656	1800	2400	3750	1875	2500	3906	398	530	828	885	1180	1844	2625	3500	5469

Est. Finance & Accounting Salary Comparisons in USD (Entry Level)



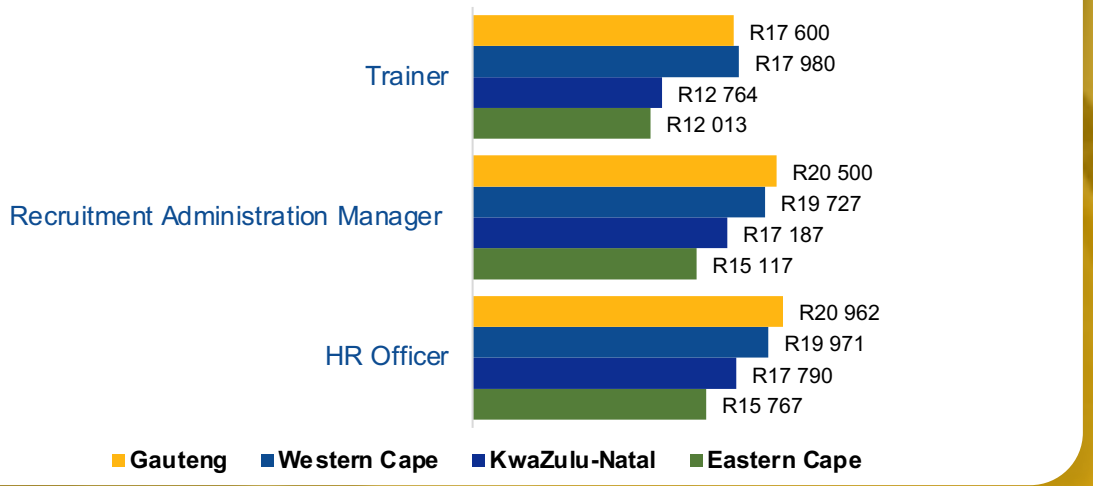
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Human Resource
Provincial Salary Comparisons

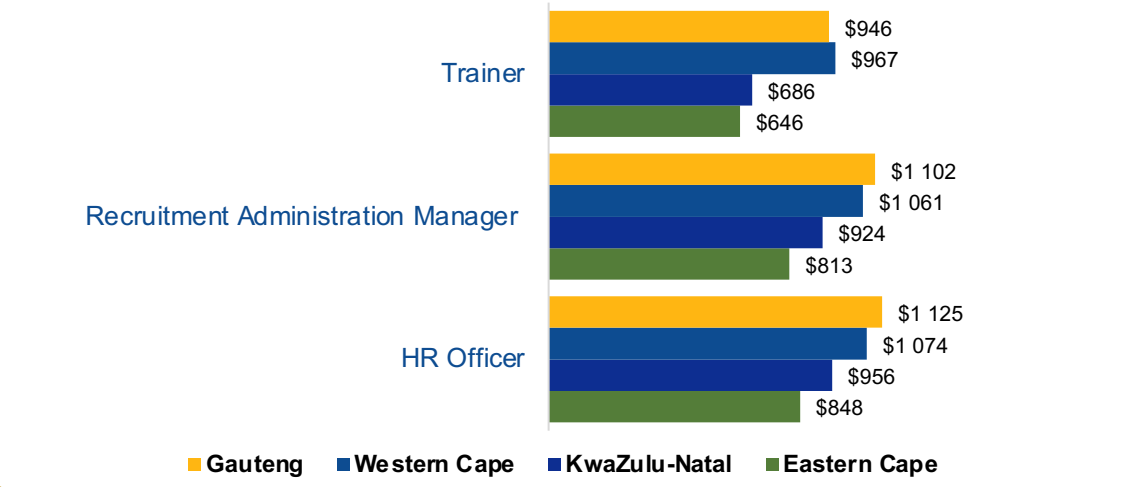
Est. Human Resource Salary Comparisons

Comparison Locations		Eastern Cape			Gauteng			KwaZulu-Natal			Western Cape		
HR Management	**Currency**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**
HR Officer	ZAR	15767	20647	29643	20926	28000	40200	17790	23475	33704	19971	26944	38684
	USD	848	1110	1594	1125	1505	2161	956	1262	1812	1074	1449	2080
Recruitment Administration Manager	ZAR	15117	20205	28294	20500	27400	38370	17187	22972	32169	19727	26367	36923
	USD	813	1086	1521	1102	1473	2063	924	1235	1730	1061	1418	1985
Workforce Planner	ZAR	15016	20000	31390	18770	25000	39200	15767	21000	32967	19145	25500	40321
	USD	807	1075	1688	1009	1344	2108	848	1129	1772	1029	1371	2168
Resource Planner	ZAR	14200	19000	29800	18000	24000	37000	14265	19000	29827	17644	23500	36892
	USD	763	1022	1602	968	1290	1989	767	1022	1604	949	1263	1983
Trainer	ZAR	12013	16000	25118	17600	23500	36890	12764	17000	26688	17980	24000	36700
	USD	646	860	1350	946	1263	1983	686	914	1435	967	1290	1973
Learning & Development Advisor/Manager	ZAR	16700	22300	35000	28530	38000	59650	18770	25000	39246	28455	37900	59480
	USD	898	1199	1882	1534	2043	3207	1009	1344	2110	1530	2038	3198

Est. Human Resource Salary Comparisons in ZAR (Entry Level)



Est. Human Resource Salary Comparisons in USD (Entry Level)



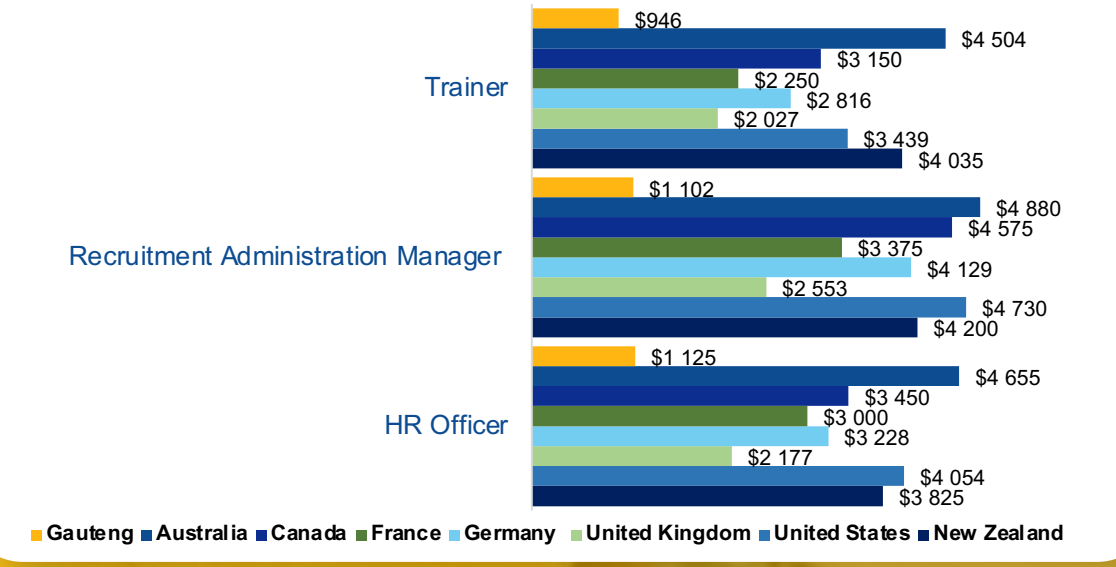
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Human Resource
Source Market Salary Comparisons

Est. Human Resource Salary Comparisons

Comparison Locations		Gauteng			Australia			Canada			France			Germany			United Kingdom			United States			New Zealand		
HR Management	Currency	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	Entry Level	Intermediate	Senior
HR Officer	ZAR	20926	28000	40200	57393	76441	120000	64515	86020	134406	60000	80000	125000	63340	84370	132450	51369	68430	107435	78496	104559	164138	71528	95370	149016
	USD	1125	1505	2161	4655	6200	9733	3450	4600	7188	3000	4000	6250	3228	4300	6750	2177	2900	4553	4054	5400	8477	3825	5100	7969
Recruitment Administration Manager	ZAR	20500	27400	38370	60166	80140	125786	85553	114070	178234	67500	90000	140625	81020	107900	169400	60243	80228	125915	91586	122005	191529	78540	104720	163625
	USD	1102	1473	2063	4880	6500	10204	4575	6100	9531	3375	4500	7031	4129	5500	8634	2553	3400	5338	4730	6300	9890	4200	5600	8750
Workforce Planner	ZAR	18770	25000	39200	52908	77574	120369	60308	80410	125641	64500	86000	134375	58900	78490	123200	61990	82560	129619	90148	120069	188488	75735	100980	157781
	USD	1009	1344	2108	4290	6290	9760	3225	4300	6719	3225	4300	6719	3003	4000	6279	2628	3500	5495	4655	6200	9733	4050	5400	8438
Resource Planner	ZAR	18000	24000	37000	56485	75230	118065	68723	91630	143172	64500	86000	134375	57450	76500	120100	54890	73124	114791	83273	111535	174816	77138	102850	160703
	USD	968	1290	1989	4580	6100	9576	3675	4900	7656	3225	4300	6719	2928	3900	6122	2327	3100	4867	4300	5750	9027	4125	5500	8594
Trainer	ZAR	17600	23500	36890	55531	73976	116018	58905	78540	122719	45000	60000	93750	55250	73530	115500	47808	63682	99959	66599	88696	139241	75455	100606	157197
	USD	946	1263	1983	4504	6000	9410	3150	4200	6563	2250	3000	4688	2816	3750	5887	2027	2700	4239	3439	4580	7190	4035	5380	8406
Learning & Development Advisor/Manager	ZAR	28530	38000	59650	79610	106043	166463	93968	125290	195766	73500	98000	153125	82490	109880	172480	70813	94338	148088	101785	135558	212807	98876	131835	205992
	USD	1534	2043	3207	6457	8600	13500	5025	6700	10469	3675	4900	7656	4204	5600	8791	3003	4000	6279	5256	7000	10989	5288	7050	11016

Est. Human Resource Salary Comparisons in USD (Entry Level)



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Human Resource
Competitor Market Salary Comparisons

Est. Human Resource Salary Comparisons

Comparison Locations	Gauteng				Egypt			Ghana			India			Jamaica			Kenya		
HR Management	Currency	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
HR Officer	ZAR	20926	28000	40200	5330	7106	11103	4208	5610	8766	4867	6489	10139	13436	17915	27992	8976	11968	18700
	USD	1125	1505	2161	285	380	594	225	300	469	260	347	542	719	958	1497	480	640	1000
Recruitment Administration Manager	ZAR	20500	27400	38370	17531	23375	36523	8696	11594	18116	9004	12005	18758	23085	30755	48284	22440	29920	46750
	USD	1102	1473	2063	938	1250	1953	465	620	969	482	642	1003	1234	1644	2581	1200	1600	2500
Workforce Planner	ZAR	18770	25000	39200	6872	9163	14317	4909	6545	10227	6956	9275	14493	13489	17986	28103	11501	15334	23959
	USD	1009	1344	2108	368	490	766	263	350	547	372	496	775	720	960	1500	615	820	1281
Resource Planner	ZAR	18000	24000	37000	9088	12118	18934	5189	6919	10811	7041	9387	14668	13745	18326	28634	11501	15334	23959
	USD	968	1290	1989	486	648	1013	278	370	578	377	502	784	735	980	1531	615	820	1281
Trainer	ZAR	17600	23500	36890	11700	15603	24500	4769	6358	9934	6564	8752	13674	16550	22066	34478	7013	9350	14609
	USD	946	1263	1983	625	833	1308	255	340	531	351	468	731	885	1180	1844	375	500	781
Learning & Development Advisor/Manager	ZAR	28530	38000	59650	16550	22066	34478	8555	11407	17823	11416	15222	23784	21697	28929	45201	20336	27115	42367
	USD	1534	2043	3207	885	1180	1844	458	610	953	611	814	1272	1160	1547	2417	1088	1450	2266

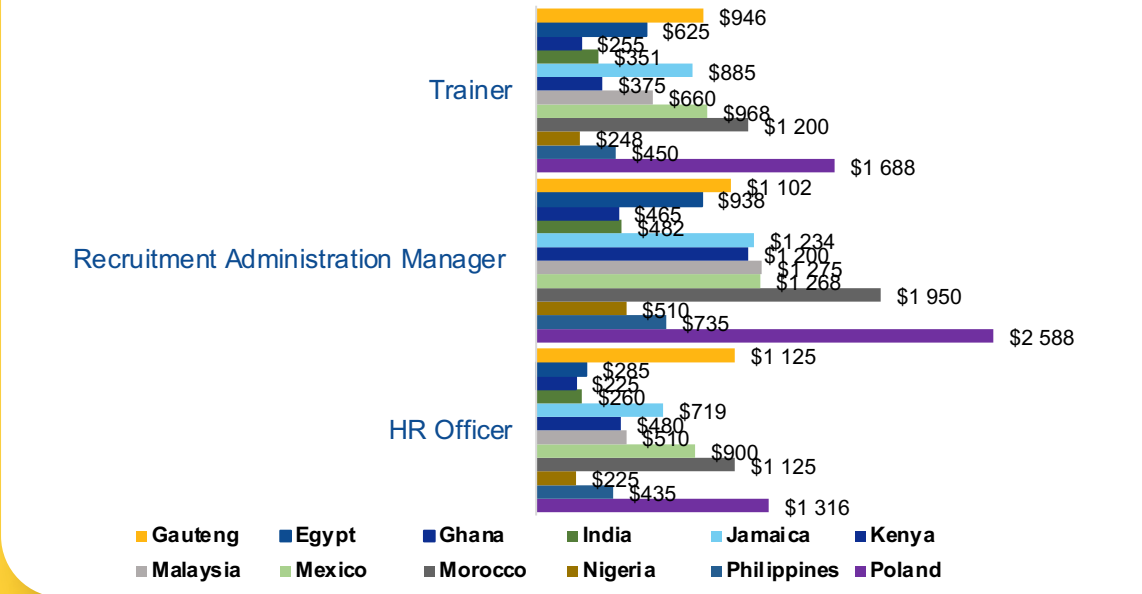
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Human Resource
Competitor Market Salary Comparisons

Est. Human Resource Salary Comparisons

Comparison Locations		Gauteng			Malaysia			Mexico			Morocco			Nigeria			Philippines			Poland		
HR Management	Currency	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
HR Officer	ZAR	20926	28000	40200	9537	12716	19869	16830	22440	35063	21038	28050	43828	4208	5610	8766	8135	10846	16947	24614	32819	51279
	USD	1125	1505	2161	510	680	1063	900	1200	1875	1125	1500	2344	225	300	469	435	580	906	1316	1755	2742
Recruitment Administration Manager	ZAR	20500	27400	38370	23843	31790	49672	23702	31603	49380	36465	48620	75969	9537	12716	19869	13745	18326	28634	48386	64515	100805
	USD	1102	1473	2063	1275	1700	2656	1268	1690	2641	1950	2600	4063	510	680	1063	735	980	1531	2588	3450	5391
Workforce Planner	ZAR	18770	25000	39200	12482	16643	26005	20477	27302	42659	25245	33660	52594	4909	6545	10227	12482	16643	26005	29453	39270	61359
	USD	1009	1344	2108	668	890	1391	1095	1460	2281	1350	1800	2813	263	350	547	668	890	1391	1575	2100	3281
Resource Planner	ZAR	18000	24000	37000	12903	17204	26881	20897	27863	43536	28050	37400	58438	5049	6732	10519	12623	16830	26297	32258	43010	67203
	USD	968	1290	1989	690	920	1438	1118	1490	2328	1500	2000	3125	270	360	563	675	900	1406	1725	2300	3594
Trainer	ZAR	17600	23500	36890	12342	16456	25713	18092	24123	37692	22440	29920	46750	4628	6171	9642	8415	11220	17531	31556	42075	65742
	USD	946	1263	1983	660	880	1375	968	1290	2016	1200	1600	2500	248	330	516	450	600	938	1688	2250	3516
Learning & Development Advisor/Manager	ZAR	28530	38000	59650	25946	34595	54055	38569	51425	80352	35063	46750	73047	8527	11370	17765	16830	22440	35063	54137	72182	112784
	USD	1534	2043	3207	1388	1850	2891	2063	2750	4297	1875	2500	3906	456	608	950	900	1200	1875	2895	3860	6031

Est. Human Resource Salary Comparisons in USD (Entry Level)



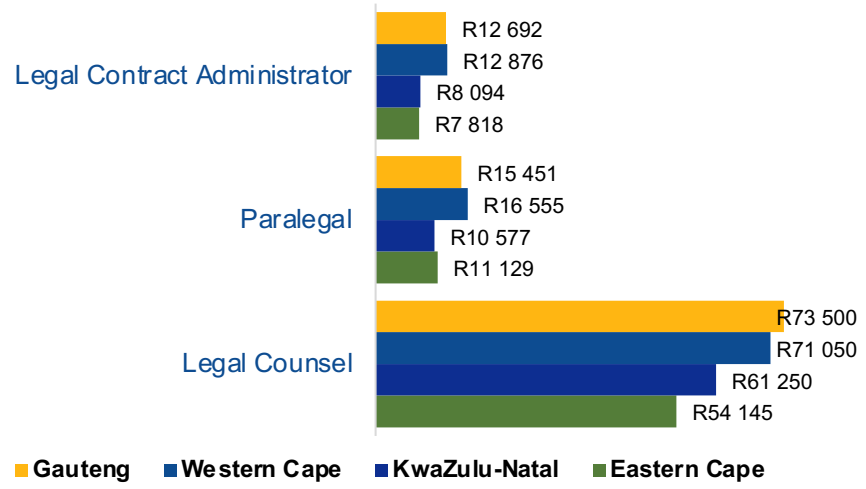
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Legal Services
Provincial Salary Comparisons

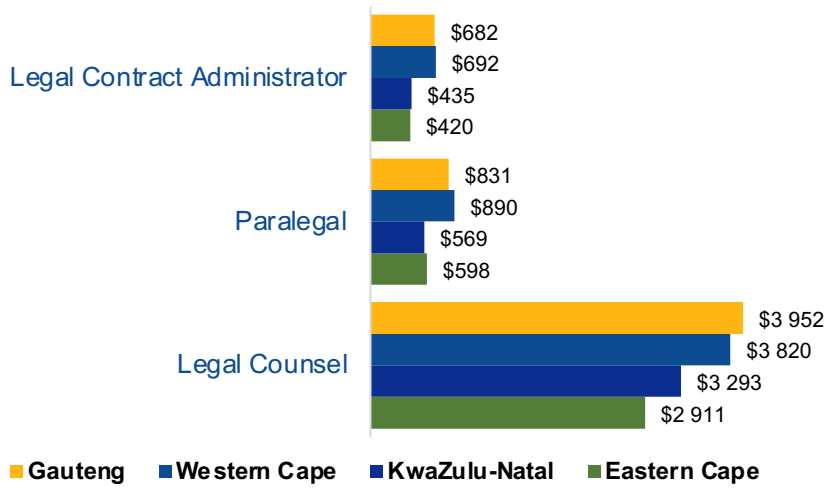
Est. Legal Services Salary Comparisons

Comparison Locations		Eastern Cape			Gauteng			KwaZulu-Natal			Western Cape		
Legal Services	**Currency**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**
Paralegal	ZAR	11129	14823	23269	15451	20580	32308	10577	14088	22115	16555	22050	34615
	USD	598	797	1251	831	1106	1737	569	757	1189	890	1185	1861
Legal Aid	ZAR	10117	13475	21153	14716	19600	30635	10209	13598	21346	16187	21560	33847
	USD	544	724	1137	791	1054	1647	549	731	1148	870	1159	1820
Legal Contract Administrator	ZAR	7818	10413	16346	12692	16905	26538	8094	10780	16923	12876	17150	26556
	USD	420	560	879	682	909	1427	435	580	910	692	922	1428
Legal Director	ZAR	73578	98000	153847	110368	147000	163394	82776	110250	172970	105769	140875	221032
	USD	3956	5269	8271	5934	7903	8785	4450	5927	9299	5687	7574	11883
Legal Counsel	ZAR	54145	71979	113925	73500	97633	140875	61250	81340	128625	71050	93922	137200
	USD	2911	3870	6125	3952	5249	7574	3293	4373	6915	3820	5050	7376

Est. Legal Services Salary Comparisons in ZAR (Entry Level)



Est. Legal Services Salary Comparisons in USD (Entry Level)



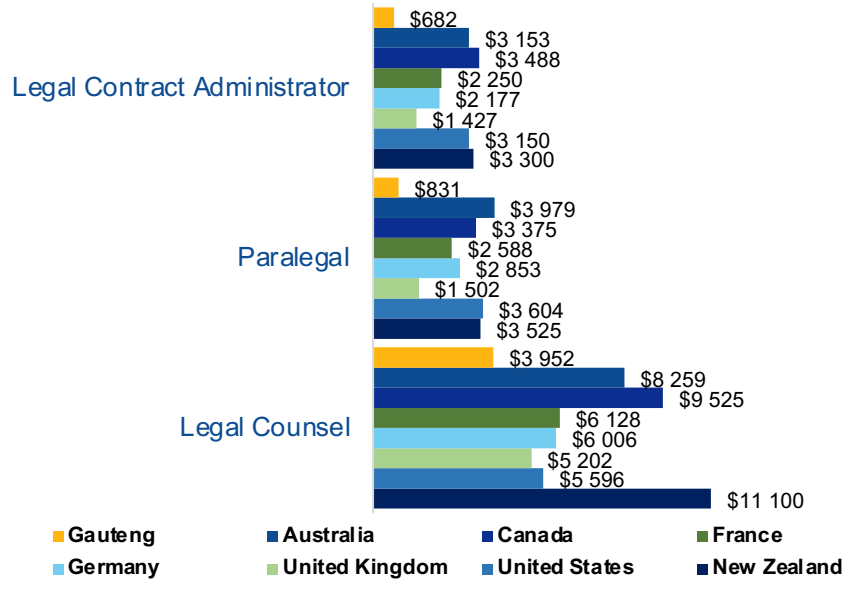
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Legal Services
Source Market Salary Comparisons

Est. Legal Services Salary Comparisons

Comparison Locations		Gauteng			Australia			Canada			France			Germany			United Kingdom			United States			New Zealand		
Legal Services	Currency	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	Entry Level	Intermediate	Senior
Paralegal	ZAR	15451	20580	32308	49068	65358	102600	63113	84150	131484	51750	69000	107813	55900	74500	117030	35485	47250	74183	69793	92954	145919	65918	87890	137328
	USD	831	1106	1737	3979	5300	8320	3375	4500	7031	2588	3450	5391	2853	3800	5965	1502	2000	3140	3604	4800	7535	3525	4700	7344
Legal Aid	ZAR	14716	19600	30635	47104	62902	98743	75735	100980	157781	46500	62000	96875	46400	61800	97000	34068	45360	71224	68185	90824	142588	64375	85833	134114
	USD	791	1054	1647	3820	5100	8006	4050	5400	8438	2325	3100	4844	2365	3150	4945	1442	1920	3014	3521	4690	7363	3443	4590	7172
Legal Contract Administrator	ZAR	12692	16905	26538	38888	51801	81298	65216	86955	135867	45000	60000	93750	42690	56800	89300	33721	44890	70491	61007	81343	127631	61710	82280	128563
	USD	682	909	1427	3153	4200	6593	3488	4650	7266	2250	3000	4688	2177	2900	4553	1427	1900	2983	3150	4200	6590	3300	4400	6875
Legal Director	ZAR	110368	147000	163394	134247	178724	280572	186533	248710	388609	129000	172000	268750	122230	162700	255700	150813	200863	315374	144965	193093	322487	214583	286110	447047
	USD	5934	7903	8785	10887	14500	22763	9975	13300	20781	6450	8600	13438	6232	8300	13038	6382	8500	13344	7485	9970	16651	11475	15300	23906
Legal Counsel	ZAR	73500	97633	140875	101841	135646	212101	178118	237490	371078	122550	163400	255313	117800	156900	246300	122735	163403	256520	108397	144367	226634	207570	276760	432438
	USD	3952	5249	7574	8259	11000	17200	9525	12700	19844	6128	8170	12766	6006	8000	12559	5202	6928	10876	5596	7453	11700	11100	14800	23125

Est. Legal Services Salary Comparisons in USD (Entry Level)



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Legal Services
Competitor Market Salary Comparisons

Est. Legal Services Salary Comparisons

Comparison Locations	Gauteng				Egypt			Ghana			India			Jamaica			Kenya		
Legal Services	Currency	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
Paralegal	ZAR	15451	20580	32308	4348	5797	9058	4488	5984	9350	4656	6208	9701	8303	11070	17298	7405	9874	15428
	USD	831	1106	1737	233	310	484	240	320	500	249	332	519	444	592	925	396	528	825
Legal Aid	ZAR	14716	19600	30635	5189	6919	10811	4208	5610	8766	5245	6994	10928	8555	11407	17823	7503	10005	15632
	USD	791	1054	1647	278	370	578	225	300	469	281	374	584	458	610	953	401	535	836
Legal Contract Administrator	ZAR	12692	16905	26538	7363	9818	15340	4067	5423	8473	8373	11164	17444	8766	11688	18262	7714	10285	16070
	USD	682	909	1427	394	525	820	218	290	453	448	597	933	469	625	977	413	550	859
Legal Director	ZAR	110368	147000	163394	49088	65450	102266	29453	39270	61359	26648	35530	55516	48120	64160	100250	54698	72930	113953
	USD	5934	7903	8785	2625	3500	5469	1575	2100	3281	1425	1900	2969	2573	3431	5361	2925	3900	6094
Legal Counsel	ZAR	73500	97633	140875	39270	52360	81813	27349	36465	56977	23843	31790	49672	43197	57596	89994	44880	59840	93500
	USD	3952	5249	7574	2100	2800	4375	1463	1950	3047	1275	1700	2656	2310	3080	4813	2400	3200	5000

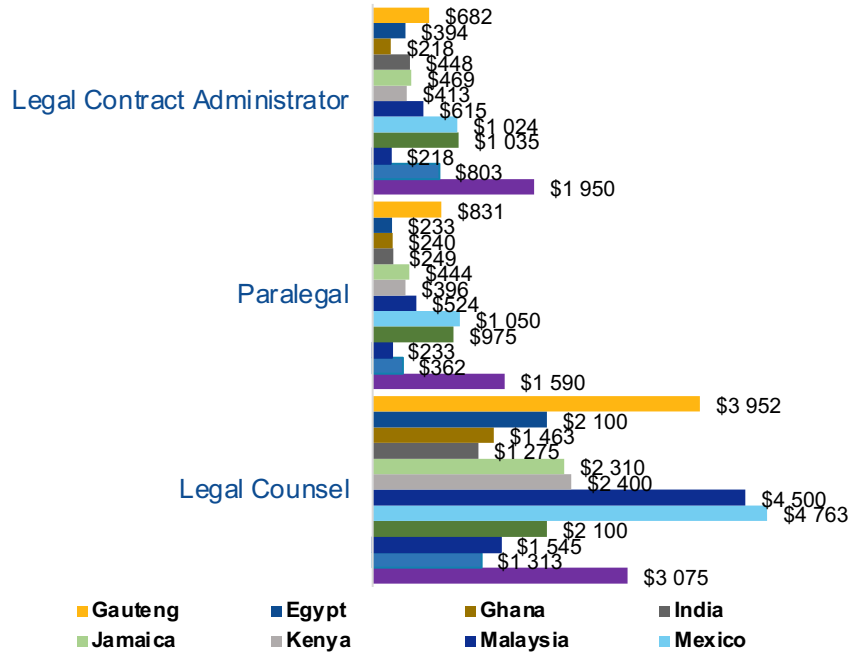
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Legal Services
Competitor Market Salary Comparisons

Est. Legal Services Salary Comparisons

Comparison Locations		Gauteng			Malaysia			Mexico			Morocco			Nigeria			Philippines			Poland		
Legal Services	Currency	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
Paralegal	ZAR	15451	20580	32308	9789	13053	20395	19635	26180	40906	18233	24310	37984	4348	5797	9058	6760	9013	14083	29733	39644	61944
	USD	831	1106	1737	524	698	1091	1050	1400	2188	975	1300	2031	233	310	484	362	482	753	1590	2120	3313
Legal Aid	ZAR	14716	19600	30635	11262	15016	23463	16269	21692	33894	16830	22440	35063	3927	5236	8181	6452	8602	13441	30154	40205	62820
	USD	791	1054	1647	602	803	1255	870	1160	1813	900	1200	1875	210	280	438	345	460	719	1613	2150	3359
Legal Contract Administrator	ZAR	12692	16905	26538	11501	15334	23959	19144	25526	39884	19355	25806	40322	4067	5423	8473	15007	20009	31264	36465	48620	75969
	USD	682	909	1427	615	820	1281	1024	1365	2133	1035	1380	2156	218	290	453	803	1070	1672	1950	2600	4063
Legal Director	ZAR	110368	147000	163394	99578	132770	207453	110798	147730	230828	47685	63580	99344	29453	39270	61359	26648	35530	55516	63113	84150	131484
	USD	5934	7903	8785	5325	7100	11094	5925	7900	12344	2550	3400	5313	1575	2100	3281	1425	1900	2969	3375	4500	7031
Legal Counsel	ZAR	73500	97633	140875	84150	112200	175313	89059	118745	185539	39270	52360	81813	28892	38522	60191	24544	32725	51133	57503	76670	119797
	USD	3952	5249	7574	4500	6000	9375	4763	6350	9922	2100	2800	4375	1545	2060	3219	1313	1750	2734	3075	4100	6406

Est. Legal Services Salary Comparisons in USD (Entry Level)



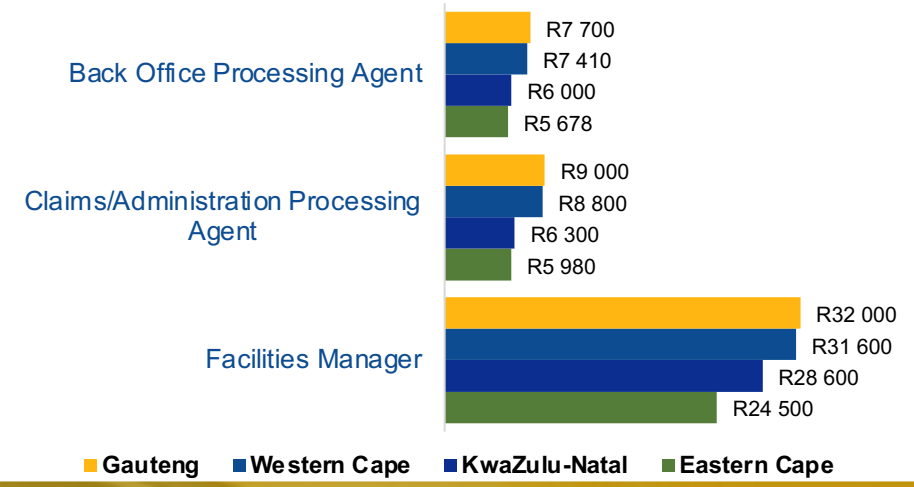
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Back Office
Provincial Salary Comparisons

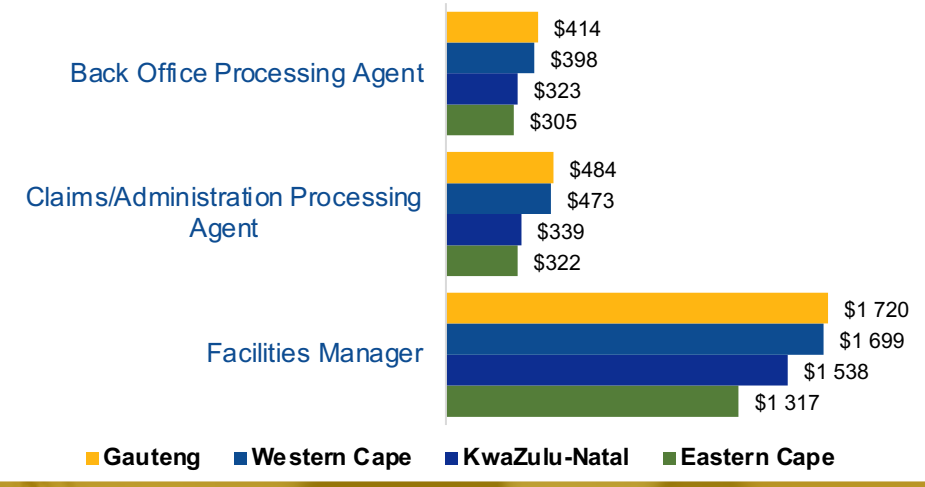
Est. BackOffice Salary Comparisons

Comparison Locations		Eastern Cape			Gauteng			KwaZulu-Natal			Western Cape		
Back Office	**Currency**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**	**Entry Level**	**Intermediate**	**Senior**
Back Office Processing Agent	ZAR	5678	7521	10692	7700	10200	14500	6000	8000	11500	7410	9815	13953
	USD	305	404	575	414	548	780	323	430	618	398	528	750
Claims/Administration Processing Agent	ZAR	5980	7700	11000	9000	12000	18000	6300	9000	12500	8800	12000	17900
	USD	322	414	591	484	645	968	339	484	672	473	645	962
Facilities Assistant	ZAR	8900	12900	15000	12000	17000	21000	10000	14000	18000	12000	17000	21000
	USD	478	694	806	645	914	1129	538	753	968	645	914	1129
Facilities Manager	ZAR	24500	32000	42386	32000	42000	60000	28600	37500	53100	31600	40000	55300
	USD	1317	1720	2279	1720	2258	3226	1538	2016	2855	1699	2151	2973

Est. Back Office Salary Comparisons in ZAR (Entry Level)



Est. Back Office Salary Comparisons in USD (Entry Level)



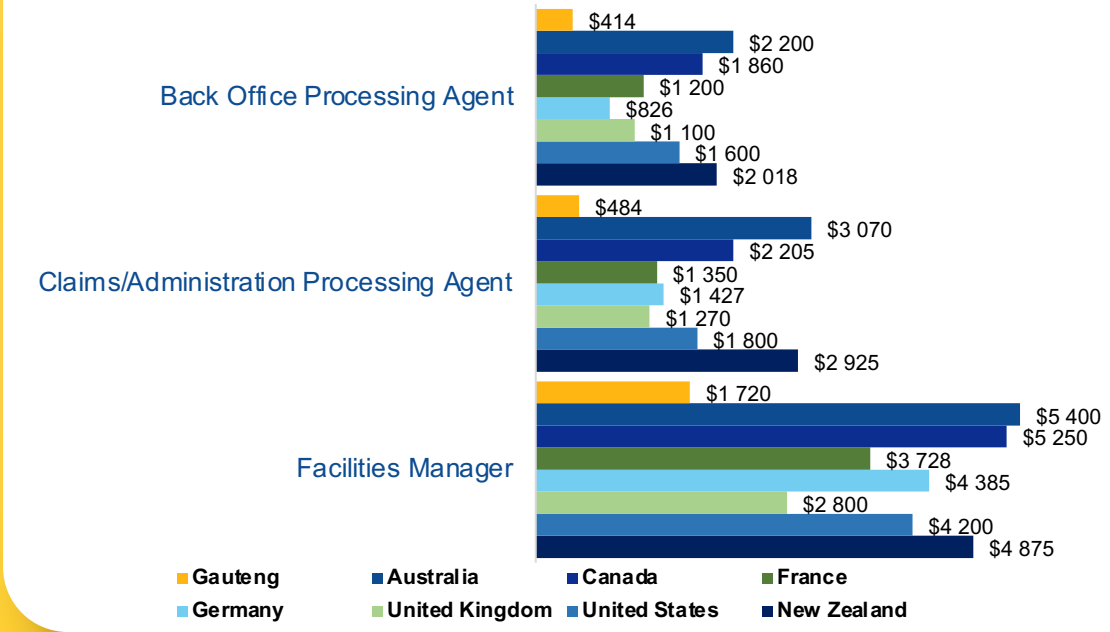
Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Back Office
Source Market Salary Comparisons

Est. BackOffice Salary Comparisons

Comparison Locations	Gauteng				Australia			Canada			France			Germany			United Kingdom			United States			New Zealand		
Back Office	Currency	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	Entry Level	Intermediate	Senior
Back Office Processing Agent	ZAR	7700	10200	14500	27136	37004	57974	34782	46376	72463	24000	32000	50000	16200	21580	33890	26000	35474	55570	30900	42121	65693	37727	50303	78598
	USD	414	548	780	2200	3000	4700	1860	2480	3875	1200	1600	2500	826	1100	1727	1100	1500	2350	1600	2180	3400	2018	2690	4203
Claims/Administration Processing Agent	ZAR	9000	12000	18000	37868	50573	78943	41234	54978	85903	27000	36000	56250	28000	27280	58500	30035	40204	63120	34779	46371	71489	54698	72930	113953
	USD	484	645	968	3070	4100	6400	2205	2940	4594	1350	1800	2813	1427	1900	2982	1270	1700	2669	1800	2400	3700	2925	3900	6094
Facilities Assistant	ZAR	12000	17000	21000	40705	55506	87084	43478	57970	90578	28500	38000	59375	42700	56900	89300	31690	4233	66218	45212	60283	94482	58204	77605	121258
	USD	645	914	1129	3300	4500	7060	2325	3100	4844	1425	1900	2969	2177	2900	4553	1340	1790	2800	2340	3120	4890	3113	4150	6484
Facilities Manager	ZAR	32000	42000	60000	66608	89921	140617	98175	130900	204531	74550	99400	155313	85900	114600	179900	66218	90341	141660	81150	110132	172734	91163	121550	189922
	USD	1720	2258	3226	5400	7290	11400	5250	7000	10938	3728	4970	7766	4385	5840	9168	2800	3820	5990	4200	5700	8940	4875	6500	10156

Est. Back Office Salary Comparisons in USD (Entry Level)



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Back Office
Competitor Market Salary Comparisons

Est. BackOffice Salary Comparisons

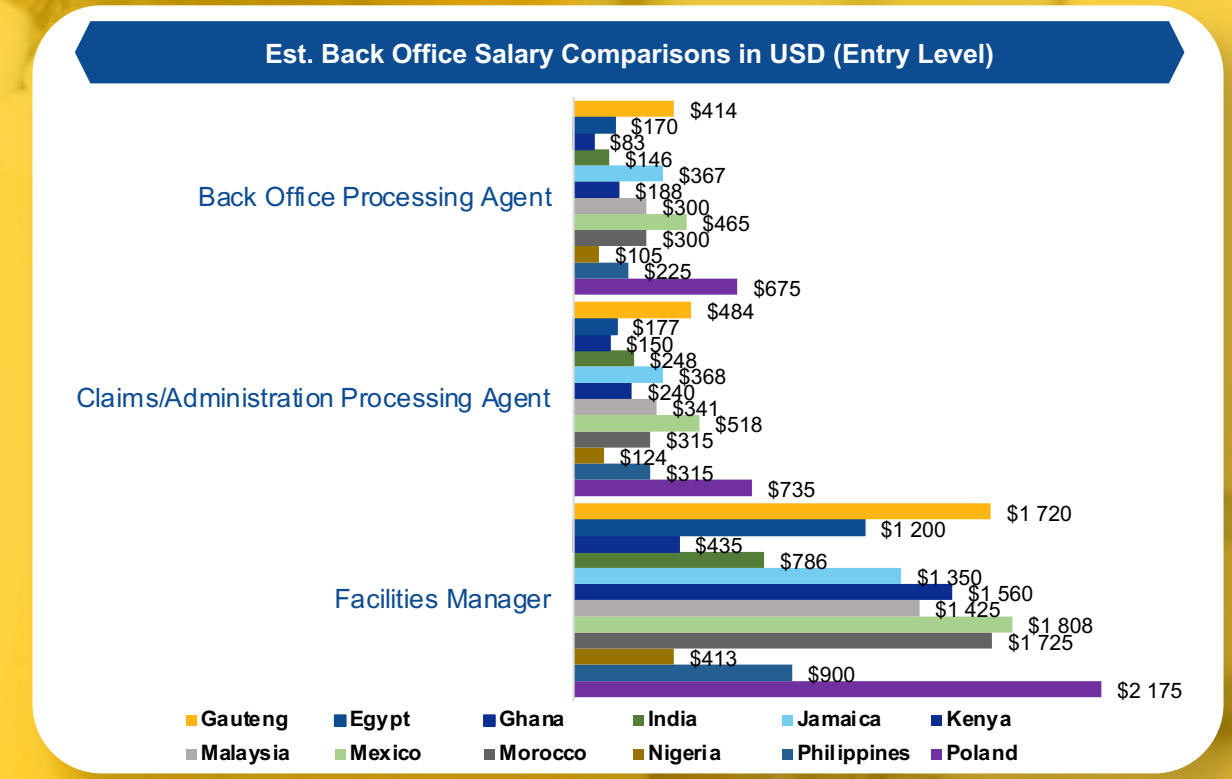
Comparison Locations		Gauteng			Egypt			Ghana			India			Jamaica			Kenya		
Back Office	Currency	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior	Entry Level	Intermediate	Senior
Back Office Processing Agent	ZAR	7700	10200	14500	3170	4226	6603	1543	2057	3214	2735	3647	5698	6858	9144	14288	3506	4675	7305
	USD	414	548	780	170	226	353	83	110	172	146	195	305	367	489	764	188	250	391
Claims/Administration Processing Agent	ZAR	9000	12000	18000	3310	4413	6896	2805	3740	5844	4628	6171	9642	6872	9163	14317	4488	5984	9350
	USD	484	645	968	177	236	369	150	200	313	248	330	516	368	490	766	240	320	500
Facilities Assistant	ZAR	12000	17000	21000	4208	5610	8766	3787	5049	7889	4881	6508	10168	13548	18064	28225	6311	8415	13148
	USD	645	914	1129	225	300	469	203	270	422	261	348	544	725	966	1509	338	450	703
Facilities Manager	ZAR	32000	42000	60000	22440	29920	46750	8135	10846	16947	14698	19598	30621	25245	33660	52594	29172	38896	60775
	USD	1720	2258	3226	1200	1600	2500	435	580	906	786	1048	1638	1350	1800	2813	1560	2080	3250

Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

Back Office
Competitor Market Salary Comparisons

Est. BackOffice Salary Comparisons

Comparison Locations	Gauteng				Malaysia			Mexico			Morocco			Nigeria			Philippines			Poland		
Back Office	Currency	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
Back Office Processing Agent	ZAR	7700	10200	14500	5610	7480	11688	8696	11594	18116	5610	7480	11688	1964	2618	4091	4208	5610	8766	12623	16830	26297
	USD	414	548	780	300	400	625	465	620	969	300	400	625	105	140	219	225	300	469	675	900	1406
Claims/Administration Processing Agent	ZAR	9000	12000	18000	6381	8509	13295	9677	12903	20161	5891	7854	12272	2314	3086	4821	5891	7854	12272	13745	18326	28634
	USD	484	645	968	341	455	711	518	690	1078	315	420	656	124	165	258	315	420	656	735	980	1531
Facilities Assistant	ZAR	12000	17000	21000	8135	10846	16947	11080	14773	23083	10379	13838	21622	3366	4488	7013	7013	9350	14609	11220	14960	23375
	USD	645	914	1129	435	580	906	593	790	1234	555	740	1156	180	240	375	375	500	781	600	800	1250
Facilities Manager	ZAR	32000	42000	60000	26648	35530	55516	33800	45067	70417	32258	43010	67203	7714	10285	16070	16830	22440	35063	40673	54230	84734
	USD	1720	2258	3226	1425	1900	2969	1808	2410	3766	1725	2300	3594	413	550	859	900	1200	1875	2175	2900	4531



Source: GBS.World | Genesis GBS & BPESA 2024 South Africa National GBS/BPO Salary Survey

This value proposition was compiled with the support and input of:

The Gauteng Department of Economic Development (GDED) is tasked with developing the right environmental framework for economic growth and job creation, and instituting sound financial management policies and structures. The department's vision is to become a centre of excellence, providing economic policy direction, development facilitation, financial management leadership, and contributing to an environment conducive to labour-absorbing economic growth.

The Gauteng Growth and Development Agency (GGDA) is the implementation arm of the Gauteng Department of Economic Development, tasked with assisting the department in leading, facilitating and managing sustainable job creation and inclusive economic growth and development in the Gauteng City Region.

The Department of Trade, Industry and Competition (the dtic) is the department of the South African government with responsibility for commercial policy and industrial policy. the dtic plays a critical role in the promotion of economic development and meaningful participation in the global economic and trade environment. It achieves this by working to build an equitable multilateral trading system that facilitates development, strengthens trade and investment links with key economies.

InvestSA is a division of the South African Department of Trade, Industry and Competition (the dtic). We support investors exploring opportunities in South Africa by helping with information, facilitation and aftercare. Our One Stop Shops provide practical assistance to streamline the process of setting up a business.

BPESA is the recognised Industry Body and Trade Association for the Global Business Services (GBS) Sector in South Africa. As a not for profit entity, BPESA was established to promote trade and serve the interests of its many stakeholder groups engaged in the development, growth and sustaining of this vibrant sector that cuts across many industry verticals of the economy.

This value proposition was compiled with the support and input of:



About GDED

The Gauteng Department of Economic Development is tasked with developing the right environmental framework for economic growth and job creation, and instituting sound financial management policies and structures. The department's vision is to become a centre of excellence, providing economic policy direction, development facilitation, financial management leadership, and contributing to an environment conducive to labour-absorbing economic growth.



About Genesis GBS

Genesis GBS empowers and enables global Knowledge Leaders. We co-create and publish business, trade and investment research, market intelligence and insights for executives of today's Experience Economy. This includes commissioned and syndicated research reports and qualitative/quantitative surveys covering business process outsourcing and services (BPO, BPS), IT-enabled services (ITES), employee experience (EX) and customer experience (CX).



About BPESA

BPESA is the recognised Industry Body and Trade Association for the Global Business Services (GBS) Sector in South Africa. As a not for profit entity, BPESA was established to promote trade and serve the interests of its many stakeholder groups engaged in the development, growth and sustaining of this vibrant sector that cuts across many industry verticals of the economy.

ALL RIGHTS RESERVED. This book contains material, text, data and content protected under International Copyright Laws and Treaties. Any unauthorised reprint or use of this material is prohibited. No part of this book may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system without express written permission from the author/publisher.

Disclaimer: The information and data in this book was comprised with the utmost care, research and professionalism. However the authors, editors and partners and suppliers of this publication accept no responsibility, or are held liable for any incorrect or inconsistent information and data.

Copyright ©2024 BPESA and Gauteng Department of Economic Development
Research commissioned and first published in 2024 by Genesis Global Business Services