BPESA INFORMATION SHARING

SOUTH AFRICAN GLOBAL BUSINESS SERVICES (GBS) SECTOR INSIGHTS

01 OCTOBER 2020

BPESA

Business Process Enabling South Africa

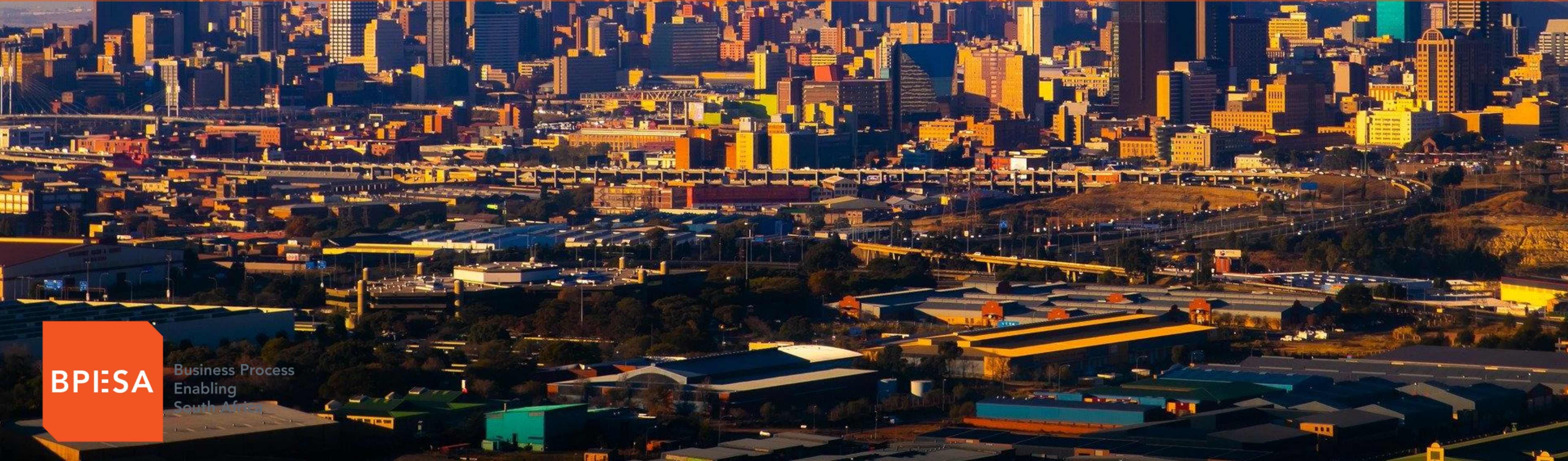
A not-for-profit company that serves as the industry body and trade association for Global Business Services in South Africa serving the international and domestic markets.

Our purpose is to market South Africa to the world as an attractive place to offshore their business processes, thereby stimulating local job creation, particularly for unemployed youth, and coordinating industry role players to provide a sustainable supply of suitably skilled people to enable the sector to remain competitive and to grow.

BPESA

Business Process Enabling South Africa

Promoting domestic and foreign investment into the Global Business Services Sector in South Africa, and working with our partners to stimulate economic growth, new job creation and skills development.



BPESA

Business Process
Enabling
South Africa

ABOUT SOUTH AFRICA

SOCIO-ECONOMIC & DEMOGRAPHIC INDICATORS

- South Africa is by far the most affluent economy in Africa when considering economies with populations above 5 million.
- South Africa is the fifth most populous country in Africa.
- While South Africa has a young population, its age dependency ratio is among the lowest in Africa.
- About one-quarter of South Africans live in either Johannesburg, Cape Town, Durban or Ekurhuleni.
- These urban hubs are well connected and present attractive consumer markets.
- South Africa is Africa's largest market for automobiles and has the largest fleet of cars on the continent.
- A number of government initiatives, such as the Jobs Fund, are geared towards employment creation.
- South Africa faces challenges of inequality; however its progressive social spending system has helped to mitigate the impact of inequality.

MEASURE	FAST FACTS
Population	• 57.7m population • 37.5m working age population • 65% <35 years old • 6% >65 years old • Annual population growth 1.6%
Highly Urbanised Population	Share of population living in urban areas: • 2018: 66.4% • 2020f: 67.4% • 2025f: 69.8%
Middle Class Indicators	• Motorisation rate: 176 vehicles per 1,000 people (2017) • 57% of the population have access to the internet • 67% of the adult population have an account with a financial institution • 95% of the population has access to improved water source (2018)
Labour Market	Unemployment rate: • 2017: 27.5% • Q3 2018: 27.5% • Q4 2018: 27.1% • Q2 2019: 29%
GDP Per Capita	Current Prices / PPP 1998: US$3 159 / $7 204 2008: US$5 802 / $11 739 2018: US$6 560 / $13 775
Gini Coefficient	• 2006: 0.72 • 2015: 0.68

PROVINCIAL ECONOMIC OVERVIEW

Provincial economic overview (cont.)

Agriculture, forestry and fishing · Mining and quarrying · Manufacturing · Trade, catering and accommodation · Finance, real estate and business services

Gauteng

Commercial hub of the country with the largest presence of MNCs in Africa

- Agriculture, forestry and fishing, 1%
- Mining and quarrying, 3%
- Manufacturing, 15%
- Trade, catering and accommodation, 14%
- Finance, real estate and business services, 24%
- Other, 44%

KwaZulu-Natal

Key manufacturing region and home to Africa's largest port

- Agriculture, forestry and fishing, 4%
- Mining and quarrying, 2%
- Manufacturing, 18%
- Trade, catering and accommodation, 15%
- Finance, real estate and business services, 17%
- Other, 44%

Western Cape

Strong services, agricultural and manufacturing sectors

- Agriculture, forestry and fishing, 4%
- Mining and quarrying, 0%
- Manufacturing, 15%
- Trade, catering and accommodation, 17%
- Finance, real estate and business services, 25%
- Other, 38%

Eastern Cape

Strong automotive clusters

- Agriculture, forestry and fishing, 2%
- Mining and quarrying, 0%
- Manufacturing, 13%
- Trade, catering and accommodation, 20%
- Finance, real estate and business services, 19%
- Other, 46%

Mpumalanga

Key coal mining and forestry region

- Agriculture, forestry and fishing, 3%
- Mining and quarrying, 24%
- Manufacturing, 13%
- Trade, catering and accommodation, 15%
- Finance, real estate and business services, 12%
- Other, 34%

Northern Cape

Most important manganese mining region in the world

- Agriculture, forestry and fishing, 8%
- Mining and quarrying, 22%
- Manufacturing, 3%
- Trade, catering and accommodation, 12%
- Finance, real estate and business services, 13%
- Other, 42%

Free State

Major producer of potatoes, grains and vegetables

- Agriculture, forestry and fishing, 5%
- Mining and quarrying, 11%
- Manufacturing, 11%
- Trade, catering and accommodation, 14%
- Finance, real estate and business services, 16%
- Other, 42%

North West

Most important platinum mining region in the world

- Agriculture, forestry and fishing, 3%
- Mining and quarrying, 34%
- Manufacturing, 5%
- Trade, catering and accommodation, 12%
- Finance, real estate and business services, 13%
- Other, 33%

Limpopo

Key producer of tropical fruits and second most important PGM producer in the country

- Agriculture, forestry and fishing, 3%
- Mining and quarrying, 29%
- Manufacturing, 3%
- Trade, catering and accommodation, 15%
- Finance, real estate and business services, 15%
- Other, 36%

* Icon indicates largest contributing province of respective sectors
** Provincial GDP
Source: StatsSA, 2019

ECONOMIC INDICATORS

- South Africa is the second largest economy in Africa.
- As Africa's anchor economy, South Africa became a member of the BRICS grouping in 2010.
- South Africa's prudent monetary policy has kept consumer prices well within its target range of 3%-6%.
- Compared to other major African economies, South Africa has a relatively low commercial bank lending rate.
- Over the last three years, the South African rand was the best performer among major currencies compared to the US dollar, gaining more than 6% against the US dollar.
- The South African rand is freely convertible.
- South Africa's foreign exchange policy has been progressively relaxed over recent years, with only minor delays in the conversion and transfer of funds.
- In 2017, South Africa was the largest exporter in Africa – exporting almost twice as much as Nigeria, Africa's second largest exporter.
- In 2017, South Africa was the largest importer in Africa – importing almost one-third more than Egypt, Africa's second largest importer.

MEASURE	FAST FACTS	
Gross Domestic Product (GDP)	• 2020f: R5.62trn (US$403.0bn) • 2019f: R5.24trn (US$385.5bn) • 2018: R4.91trn (US$376.8bn)	• 2017: R4.65trn (US$349.3bn) • 2016: R4.35trn (US$295.8bn) • 2015: R4.05trn (US$317.7bn)
GDP Growth	• 2020f: 1.5% • 2019f: 0.6% • 2018: 0.8% • 2017: 1.3% • 2016: 0.6% • 2015: 1.3%	**2000 – 2018:** **2.8% p.a. (average)**
Consumer Price Inflation	• 2018: 4.8% (average)	**2010-2018:** **5.3% (average)**
Interest Rates	Policy rate (repo rate): • 2018: 6.59% (average) • 23 Jan 2019: 6.75%	
Exchange Rate	2018 average: $1.00 = R13.25	
Merchandise Trade	**Exports in 2017: US$88.3bn** Top export destinations: • China: US$8.7bn • US: US$6.6bn • Germany: US$5.8bn • Japan: US$4.2bn • India: US$4.1bn	**Imports in 2017: US$83.0bn** Top import sources: • China: US$15.2bn • Germany: US$9.6bn • US: US$5.5bn • India: US$3.9bn • Saudi Arabia: US$3.8bn

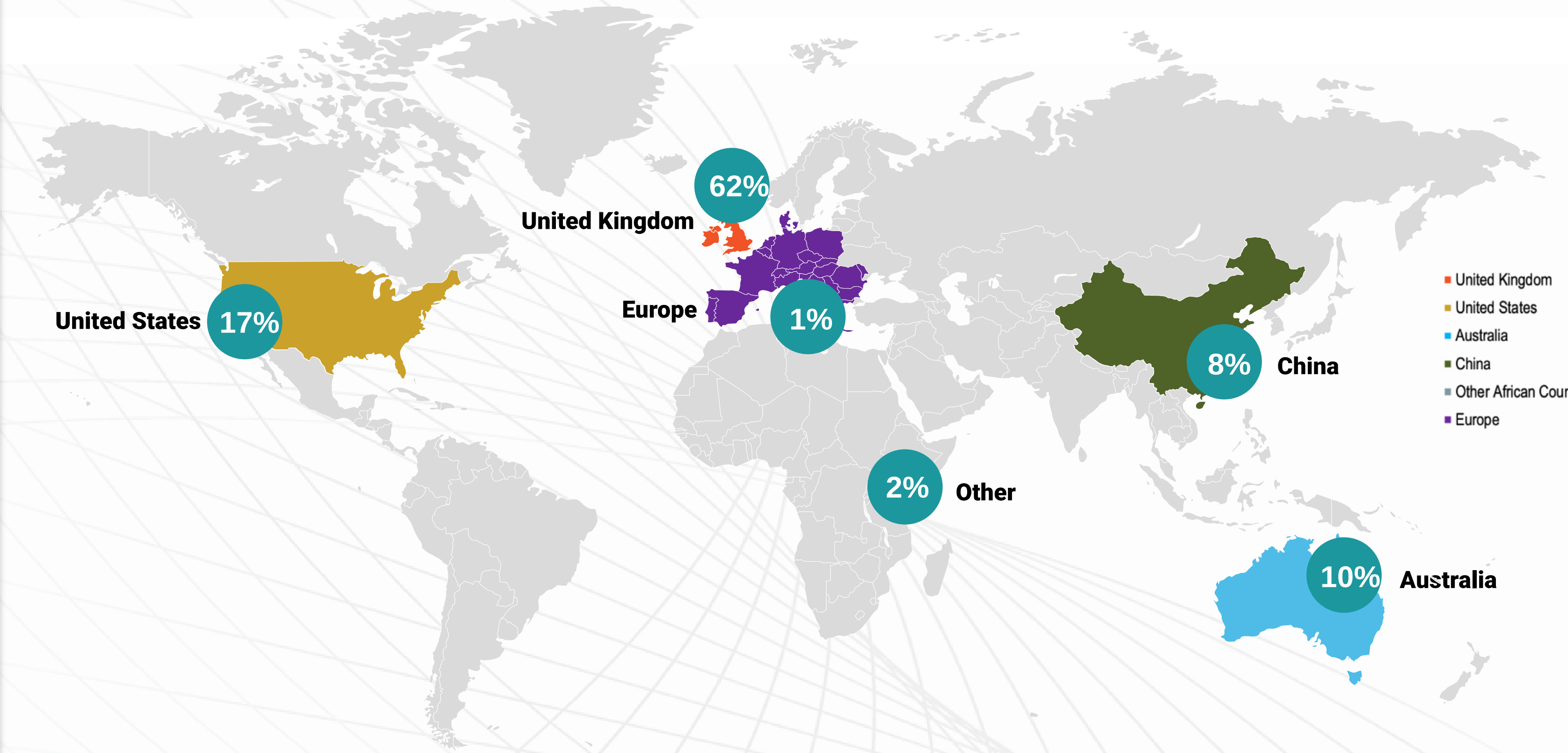
GLOBAL BUSINESS SERVICES SECTOR: EXTERNAL PERSPECTIVE

Size of SA's GBS market: export revenue

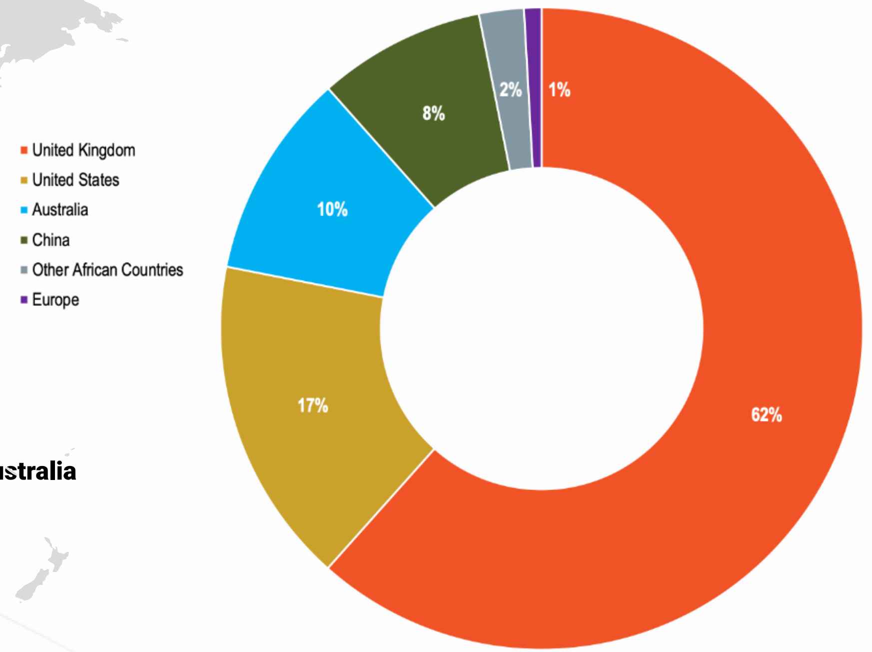
Export Revenue USD (billion)		% Contribution to GDP	Year	No: Jobs
$	186 466 165,41	0,12%	1995	5000
$	271 512 077,29	0,09%	2009	9065
$	444 402 684,56	0,14%	2015	26700
$	593 083 149,37	0,20%	2016	32500
$	734 110 429,45	0,21%	2017	38600
$	851 774 741,20	0,23%	2018	49767
$	1 119 244 537,23	0,32%	2019	64853

In terms of export revenue the global services market in South Africa is estimated to be worth over $1.1 billion.

Global markets serviced from South Africa



Indication of global markets serviced for Q2 2019 - Q2 2020

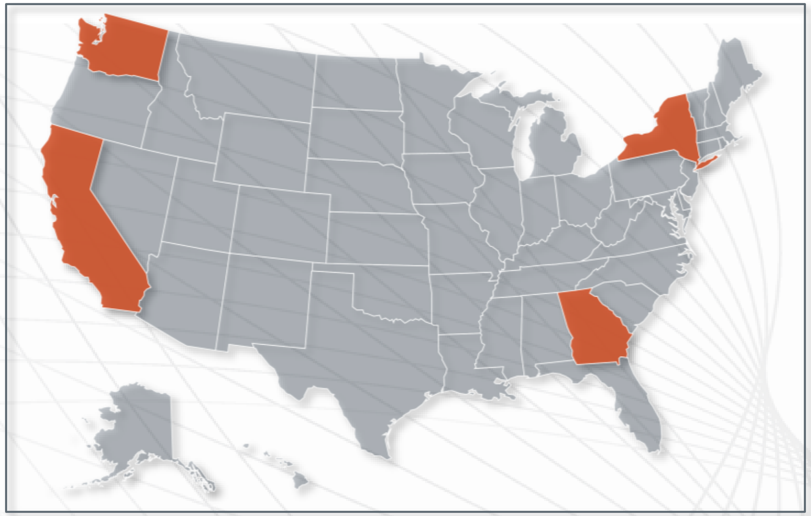


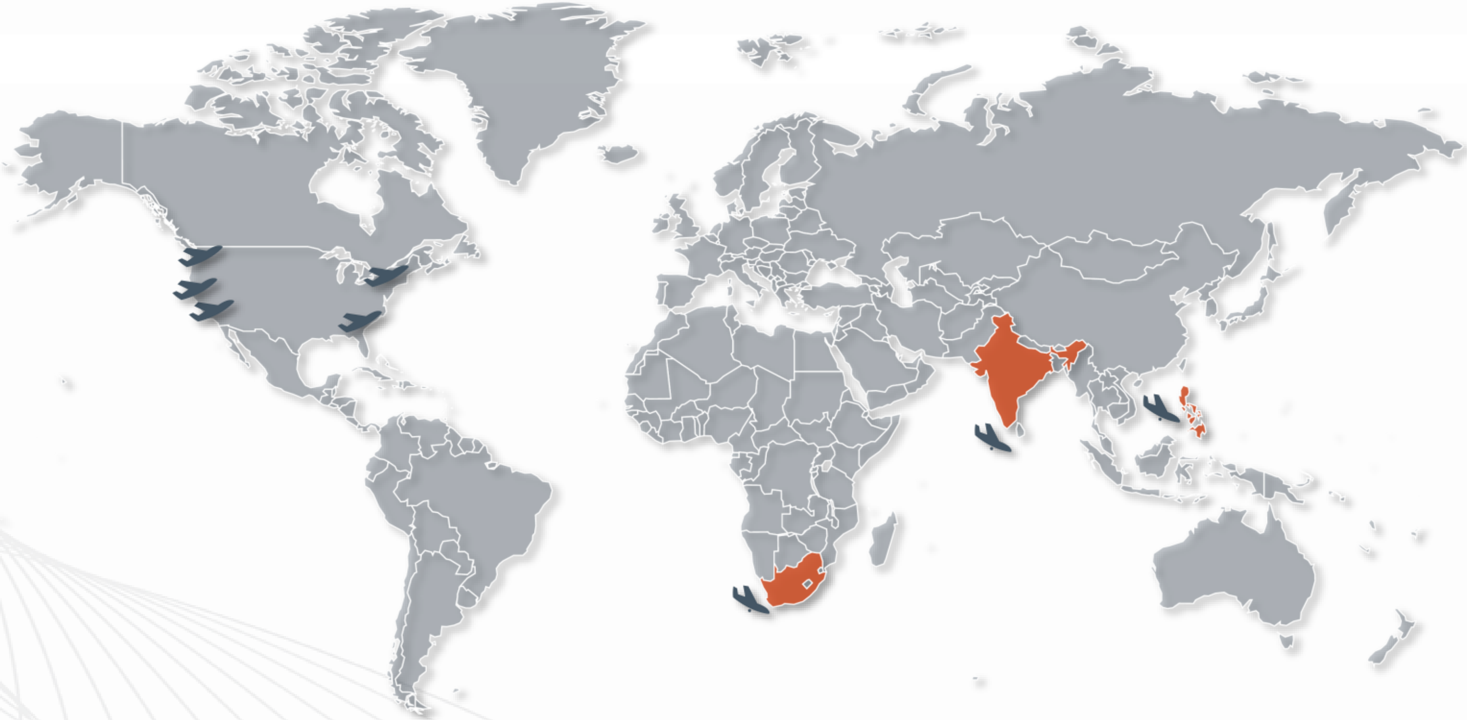
The United States is a fast-growing source market for global business services delivered from South Africa (17%).
Other international markets serviced from South Africa include the United kingdom (62%), Australia (10%), China (8%), other African countries (2%) and Europe (1%)*.

**Based on aggregated data from the reporting period Q2 2019 to Q2 2020.*

BPESA Business Process Enabling South Africa
harambee YOUTH EMPLOYMENT ACCELERATOR
G:ENESIS GLOBAL BUSINESS SERVICES
Knowledge Executive
the dtic Department: Trade, Industry and Competition REPUBLIC OF SOUTH AFRICA
investSA ONE STOP SHOP

TRAVEL DISTANCES FROM THE USA





Atlanta

- India - 8,520 mi
- Philippines: 8,779 mi
- South Africa - 8,266 mi

Los Angeles

- India: 8,490 mi
- Philippines: 7,332 mi
- South Africa: 10,164 mi

New York

- India: 7,854 mi
- Philippines: 8,593 mi
- South Africa: 7,888 mi

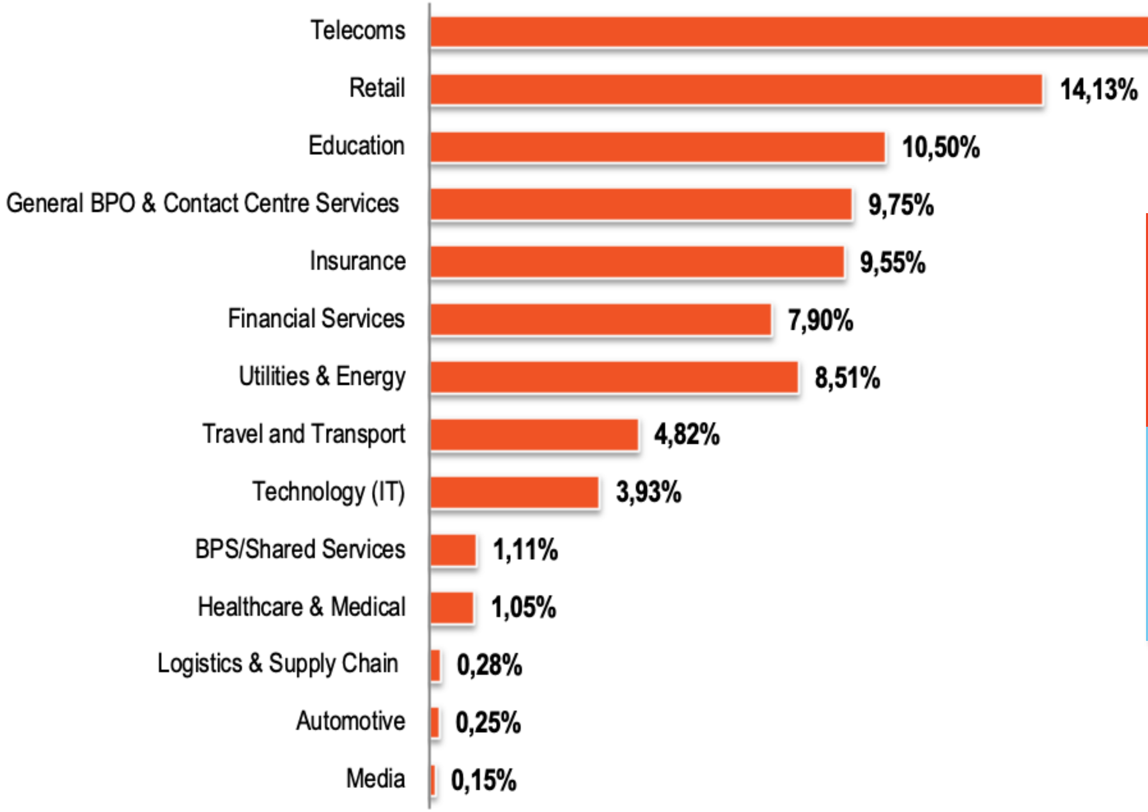
San Francisco

- India: 8,166 mi
- Philippines: 7,007 mi
- South Africa: 10,401 mi

Washington

- India: 7,554 mi
- Philippines: 6,760 mi
- South Africa: 10,181 mi

Global vertical industries serviced from South Africa



The telecoms, retail and education sectors are the largest vertical industries serviced from South Africa for global source markets. Where operators service multiple verticals without any one predominance, these have been categorised as "general BPO & contact centres". During the next two to five years, **further growth is expected in the insurance, healthcare, shared services and technology sectors**.

**Based on aggregated data from the reporting period Q1 2018 to Q2 2020.*

GLOBAL RANKINGS FOR CX & CONTACT CENTRE SERVICES

2018 TOP 5

1. Philippines
2. Malaysia / South Africa
3. India
4. Sri Lanka
5. Mexico

2019 TOP 5

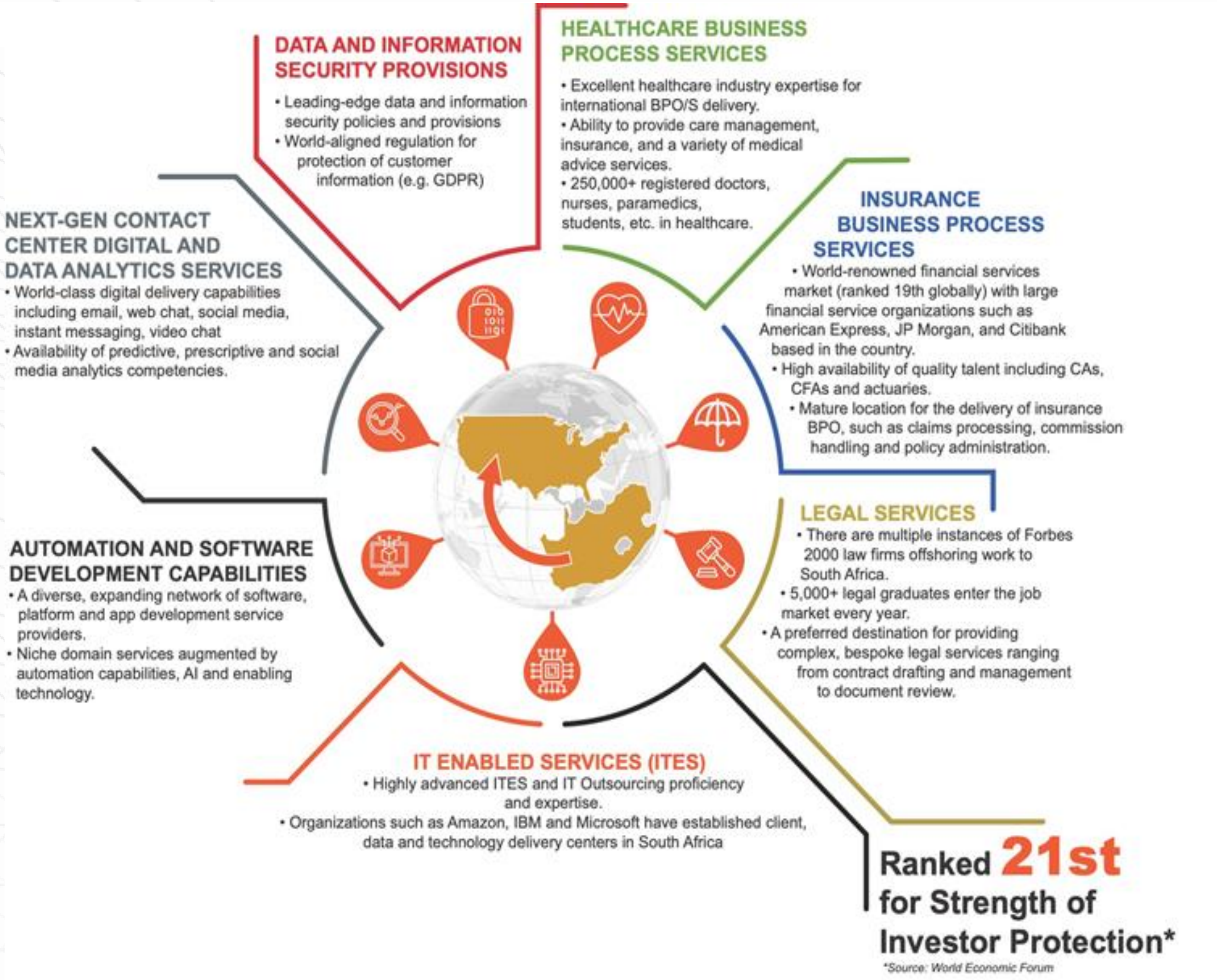
1. Philippines
2. India / South Africa
3. Malaysia
4. Egypt
5. Morocco

2020 TOP 5

1. India
2. South Africa
3. Philippines
4. Malaysia
5. Poland

Source: 2020 Global Front Office BPO Omnibus Survey by Ryan Strategic Advisory

GBS capabilities, expertise & services delivered by South Africa for the USA



SOURCING COMPARISON: USA & SOUTH AFRICA

GBS/BPO Average Mean Salaries

Outsourced Role	United States	South Africa
Call Center Agent	$2152 per month	$ 484 per month
Call Center Team Leader	$3417 per month	$1055 per month
Call Center Manager	$5983 per month	$2260 per month
Site Manager/Executive	$12285 per month	$2727 per month
Customer Experience Manager	$5833 per month	$2635 per month
Training Manager	$5954 per month	$2374 per month
QA/Coach	$4561 per month	$ 857 per month

Digital and ICT Average Mean Salaries

Outsourced Role	United States	South Africa
IT Help Desk Agent	$2330 per month	$ 858 per month
ICT Manager	$5620 per month	$2989 per month
Data Analyst	$5559 per month	$1928 per month
Data Scientist	$5612 per month	$3006 per month
Software Developer	$6533 per month	$2053 per month
Cyber/IT Security Specialist	$9199 per month	$3772 per month
Machine Learning Specialist	$9274 per month	$2639 per month

GBS Offshore Favoured Locations

- Columbia
- Egypt
- Honduras
- India
- Jamaica
- Malaysia
- Mexico
- Philippines
- South Africa

Major Verticals That Are Outsourcing

- Banking and Financial Services
- Healthcare
- Manufacturing
- Insurance
- Technology
- Telecom
- Retail & eCommerce
- Others

Pain Points and Challenges

- Data protection and compliance
- Cybersecurity
- Changing political scenarios
- COVID-19
- Evolving work models (e.g. W@H)
- Shoestring budgets
- Health and healthcare system concerns
- Customer churn
- Scarcity of critical skilled talent
- Employee attrition
- Automation and digitization
- Technology silos

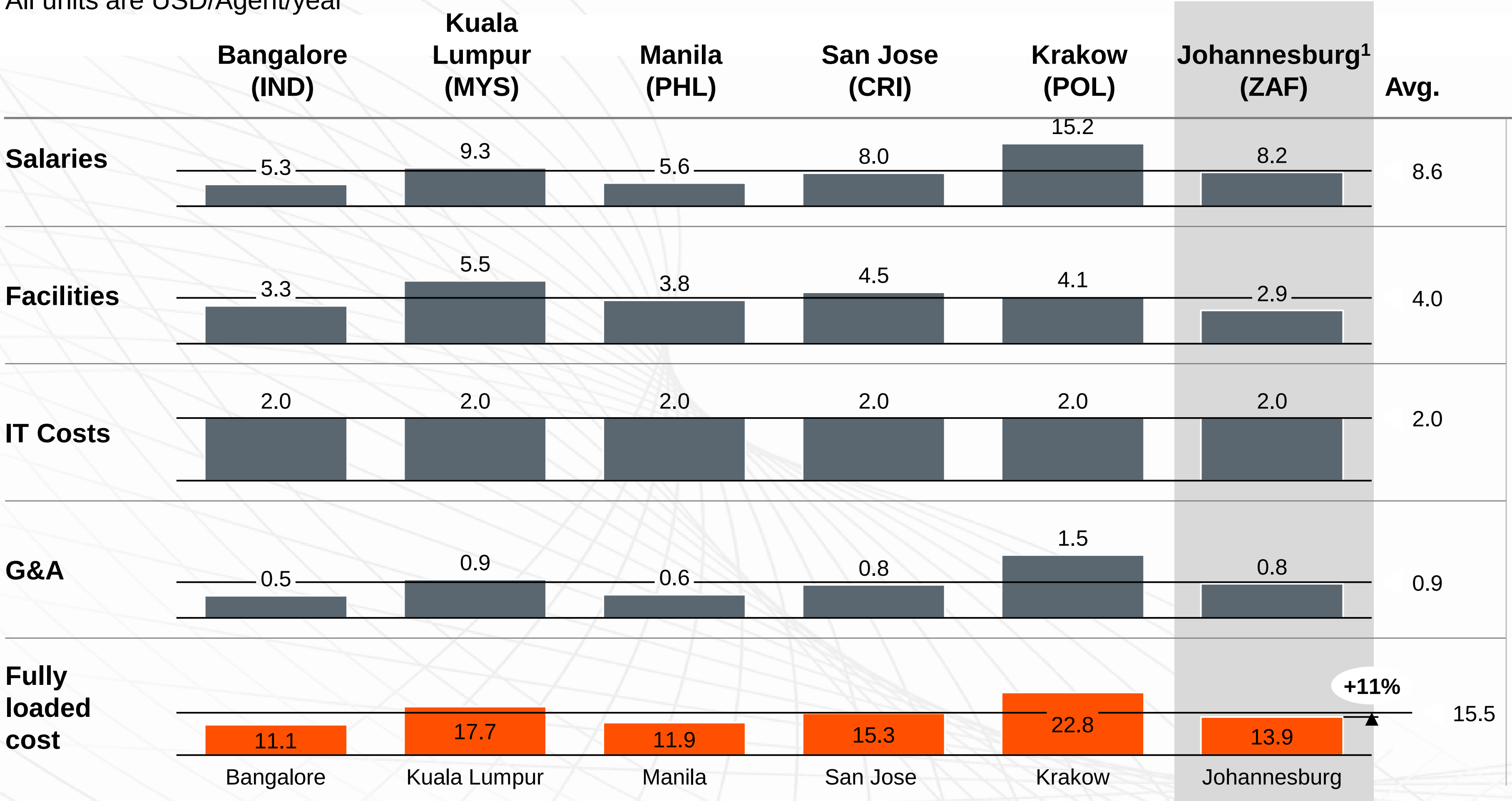
Outsourcing Criteria

- Experience of having worked with clients from various backgrounds.
- Knowledge of vertical-specific business models and relevant services.
- **31% of organizations witnessed a rise in service quality with outsourcing.**
- 57% of businesses outsource processes because it helps them focus on core processes.
- **17% of enterprises believe "outsourcing drives broader transformational change**"

Source: 2020 Knowledge Executive Global Business Services Buyers Guide and Investment Survey

Sourcing comparison: USA & South Africa

All units are USD/Agent/year



Key Insights

- SA is cost competitive with Kuala Lumpur, San Jose and Krakow
- SA is not competitive with India and the Philippines due to salaries being significantly lower in those countries
- The weakening of the Rand caused by the pandemic has resulted in SA BPOs becoming more competitive with those in Manila and Bangalore; however, the longevity of this trend is uncertain

1. Johannesburg benchmarks hold for Cape Town as well

Source: McKinsey & Company

US companies serviced from South Africa

NOT EXHAUSTIVE

Some US brands serviced from SA

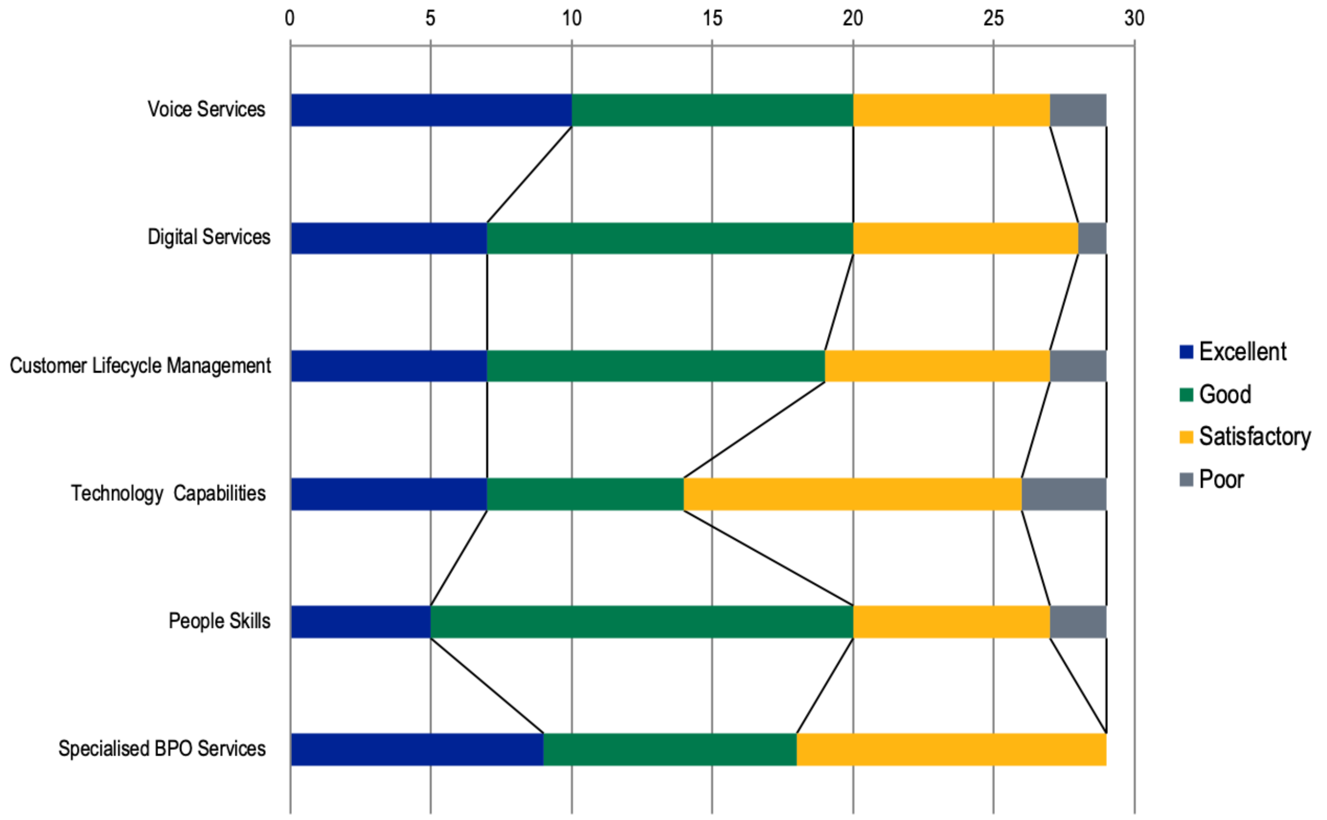
Global service providers in SA

Sources: BPESA, Knowledge Executive, the dtic, Everest Group (2019)

GLOBAL BUSINESS SERVICES SECTOR: USA EXECUTIVE PERSPECTIVE

SOURCING COMPARISON: USA & SOUTH AFRICA

US Executives: Please rate South Africa's outsourcing and customer experience capabilities

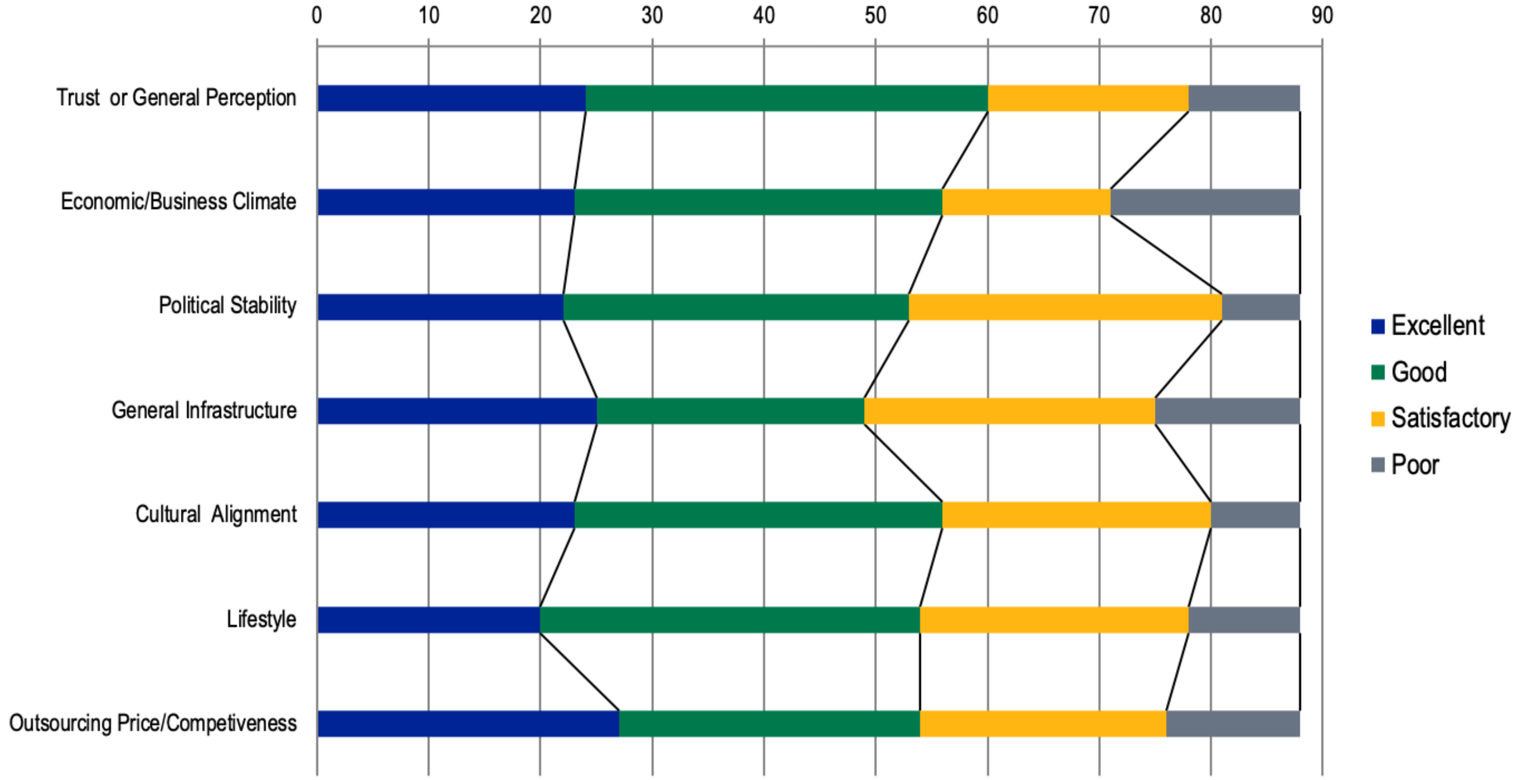


US executives rank South Africa highly for voice, digital and people skills

Source: 2019 Knowledge Executive Global Vertical Industry CX Survey

SOURCING COMPARISON: USA & SOUTH AFRICA

US Executives: Please rate South Africa's enabling investment environment?

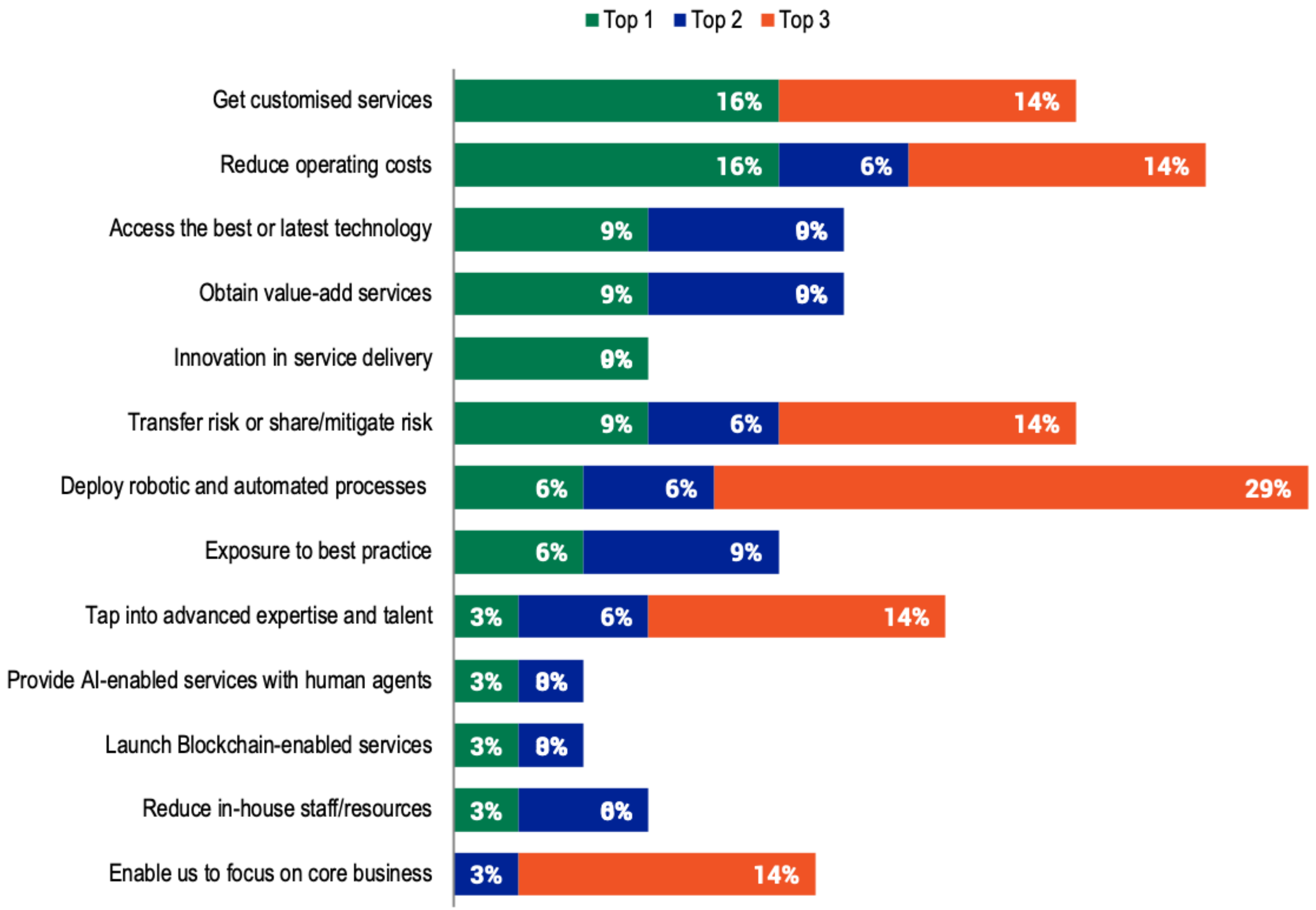


US executives also indicated that South Africa scores well for "Trust", "Political Stability", "Cultural Alignment" and "Price/Competitiveness".

Source: 2019 Knowledge Executive Global Vertical Industry CX Survey

SOURCING COMPARISON: USA & SOUTH AFRICA

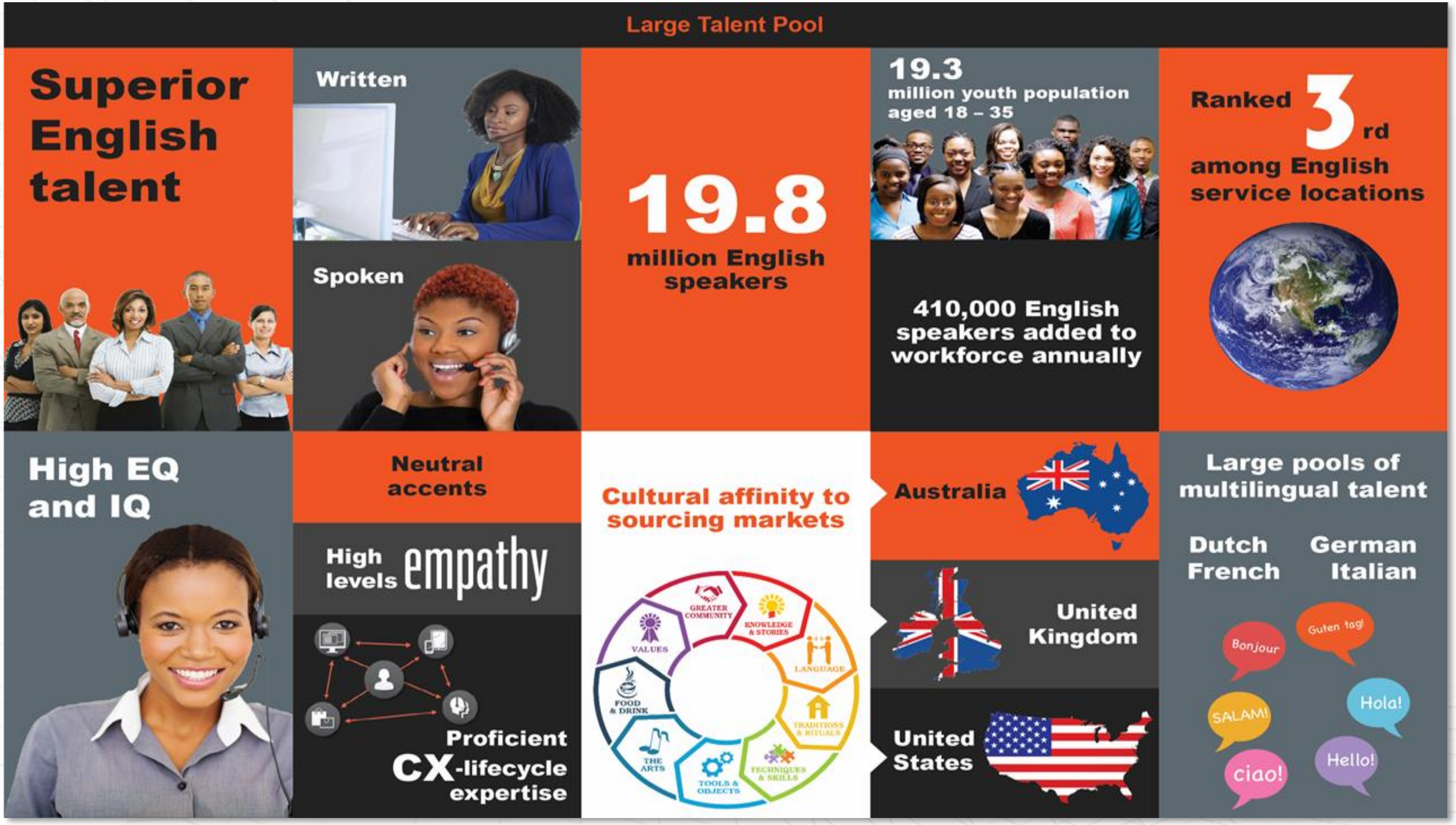
US Executives: what would make your organization consider outsourcing to a service provider in South Africa?



Source: 2019 Knowledge Executive Global Vertical Industry CX Survey

GLOBAL BUSINESS SERVICES SECTOR: INTERNAL PERSPECTIVE

ENGLISH SPEAKING TALENT POOL



DOMAIN SKILLS

Deep Domain Skills

21st in world for **Strength of Investor Protection**

2,000+ **qualified actuaries**

5,000+ **legal graduates** per year

12,800+ **master degree** graduates per year

45,000+ **chartered accountants**

45,000+ **research** and social sciences graduates per year

86,000+ engineering **ICT and science** graduates per year

250,000 registered **doctors, nurses,** paramedics

GDPR compliant

World renowned data protection laws aligned to UK and EU

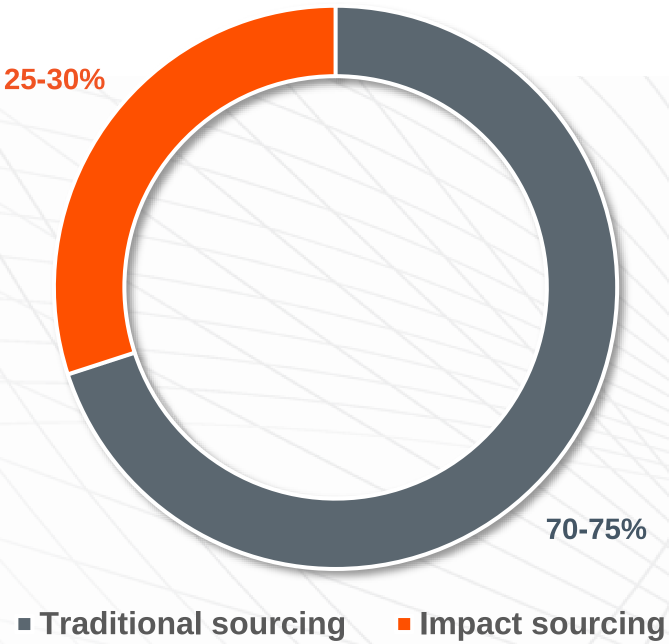
CERTIFIED

Global pioneer and leader in international Customer Contact Centre Standard ISO 18295-1:2017

South Africa is one of the **leaders in terms of availability of CFA charter holders and actuarial degree holders.**

IMPACT SOURCING

South Africa Global Services market size: breakdown by talent sourcing model



- Impact sourcing is more than one-fourth of the Global Services market in South Africa. This is mainly driven by the contact centre industry which hires a large proportion of unemployed high school graduates (who qualify as IS workers).
- There has been an uptick in the number of companies hiring IS workers which is a reflection of the increasing number of programmes the government is putting in place. Additionally, companies are now aware that they have the opportunity to make a greater social impact and that the talent pool IS offers is usually more stable.
- South Africa also offers a very comprehensive ecosystem of enterprises, service providers, training academies and industry support which assists in identifying, training and hiring IS workers.

GLOBAL IMPACT SOURCING COALITION

The ROCKEFELLER FOUNDATION

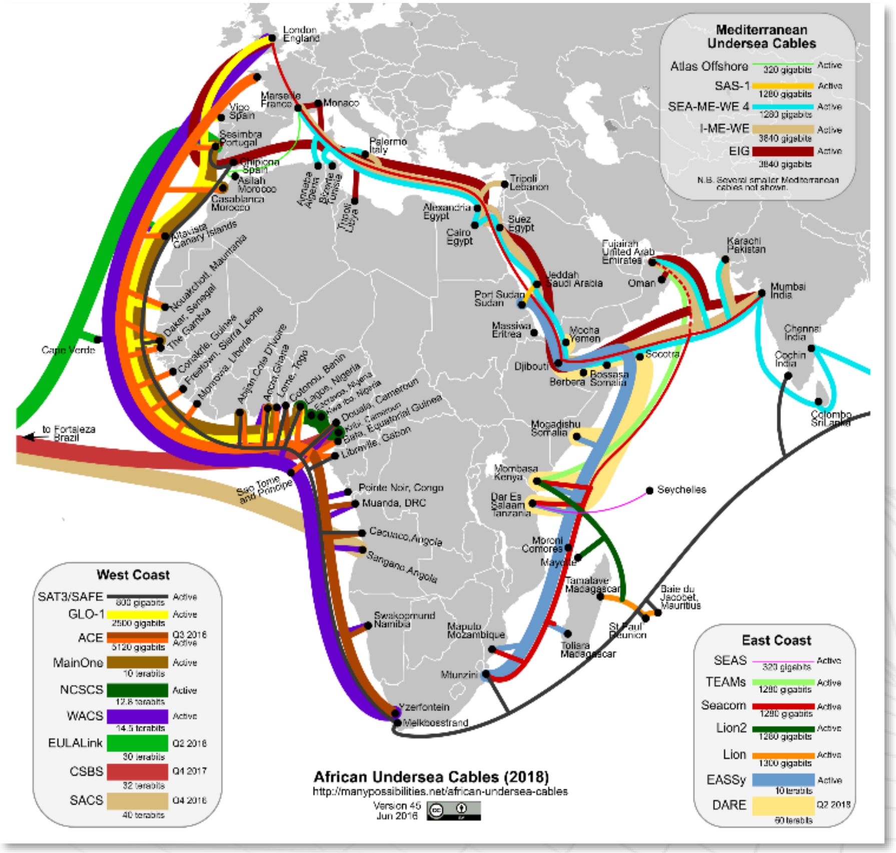
BPESA in South Africa, along with the Rockefeller Foundation, has played an important role in championing the Global Impact Sourcing Coalition which is a collaboration between businesses for creating jobs amongst the disadvantaged community.

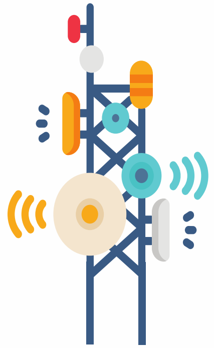
This foundation connects buyers and suppliers through the world's first Impact Sourcing Directory and provides support to companies measuring Impact Sourcing programmes and evaluates the effects of these programmes on society.

Company Case Study

- A leading customer experience and BPO company has successfully implemented the Impact Sourcing programme in partnership with Harambee Youth Employment Accelerator.
- They monitored the impact of worker performance during the pilot programme and recorded exceptional results:
  - Punctuality, attendance and attrition amongst impact workers was better than the site average
  - From a performance metric perspective, across call types and compliance, there was no difference between impact workers and the site average
- This company has been hiring impact workers from Harambee in batches and has reaped benefits in terms of revenue appreciation, stable service delivery and better client experience

ICT INFRASTRUCTURE





Total size of telecommunications industry in South Africa

R164 billion ($12 billion)*

**Source: ICASA*

2
landline telecommunications service providers: Telkom and Neotel/Liquid Telecom

53.4
million smartphone subscriptions*

73%
mobile internet penetration by 2021

99%
3G coverage across the country

4
licensed mobile service providers: Cell C, MTN, Telkom Mobile and Vodacom (65% owned by Vodafone)

62%
internet users/penetration

85%
4G/LTE coverage across the country

5G
coverage has launched via data-only network operator, Rain, Liquid Telecom, Vodacom and MTN.

Delivery centres

Cape Town

Ranked 94th in Mercer's 20th Quality of Living Ranking Cape Town includes:

1. Table Mountain one of the New 7 Wonders of Nature.
2. Cape Point Nature Reserve
3. Boulders Beach Penquin Colony
4. Robben Island
5. Wine Estates and Routes

CapeTown Lifestyle Facts:

934+ restaurants*
919+ schools
43+ hiking trails
36+ beaches
26+ theatres, galleries, museums
20+ wine estates
14+ major shopping malls
15+ golf courses
12+ spa & wellness centres
5+ fun parks
4+ nature reserves

*Sources: Dining Out, Safari Now

Durban

Ranked 89th in Mercer's 20th Quality of Living Ranking Durban includes:

1. uShaka Marine World
2. Durban Botannical Gardens
3. Moses Mabhida Stadium
4. Valley of 1,000 Hills
5. Hluhluwe Game Reserve

Durban Lifestyle Facts:

204+ restaurants*
577+ schools
13+ beaches
2+ animal parks
6+ theatres, galleries, museums
6+ major shopping malls
3+ golf courses
8+ spa & wellness centres
3+ fun parks and casinos
8+ nature reserves

Johannesburg

Ranked 95th in Mercer's 20th Quality of Living Ranking Johannesburg includes:

1. Cradle of Humankind
2. Hartebeespoort Dam
3. Gold Reef City and Casino
4. Lion and Cheetah Parks
5. Joburg Botannical Gardens

Johannesburg Lifestyle Facts:

916+ restaurants*
1530+ schools
4+ animal parks
16+ theatres, galleries, museums
12+ major shopping malls
13+ golf courses
12+ spa & wellness centres
3+ casinos
3+ big event venues
2+ nature reserves
2+ racecourses
3+ village markets

Pretoria/Tshwane

The administrative capital of South Africa Pretoria-Tshwane includes:

1. Dinokeng Game Reserve
2. Lesedi Cultural Village
3. Lion and Cheetah Parks
4. Voortrekker Monument
5. Freedom Park Heritage Site

Pretoria/Tshwane Lifestyle Facts:

396+ restaurants*
611+ schools
4+ animal parks
4+ hiking trails
11+ theatres, galleries, museums
7+ major shopping malls
4+ golf courses
5+ fun parks
3+ nature reserves
2+ village markets
1+ 4x4 trail

Port Elizabeth

Gateway to the Eastern Cape Port Elizabeth includes:

1. Addo Elephant Park
2. Whale Watching in Algoa Bay
3. Bird Island Marine
4. Eastern Cape Beaches
5. Groendal Wilderness Area

Port Elizabeth Lifestyle Facts:

174+ restaurants*
267+ schools
5+ animal parks
4+ hiking trails
14+ beaches
10+ theatres, galleries, museums
6+ major shopping malls
3+ golf courses
5+ fun parks
5+ nature reserves

East London

East London is a city on the Indian Ocean, in South Africa's Eastern Cape and includes:

1. East London Zoo
2. East London Coast Nature Reserve
3. Nahoon Estuary Nature Reserve
4. East London Aquarium
5. East London Lion Park

East London Lifestyle Facts:

73+ restaurants*
282+ schools
12+ beaches
3+ animal parks
4+ hiking trails
2+ theatres, galleries, museums
5+ major shopping malls
2+ golf courses
1+ nature reserve
1+ 4x4 trail

Weather

South Africa's climatic conditions generally range from Mediterranean in the southwestern corner of South Africa to temperate in the interior plateau, and subtropical in the northeast. A small area in the northwest has a desert climate. **Most of the country has warm, sunny days and cool nights.** *Source: SA-Venues.com*

Safaris

The **game reserves** and **national parks** of South Africa reflect the same variety in their fauna and flora. South Africa is the proud home of no fewer than 20 national parks. This includes two of the world's most famous wildlife reserves, the **Kruger National Park** and **Kgalagadi Transfrontier Park**.
Source: SA-Venues.com

Beaches

South Africa is home to some of the world's **best beaches**. Four South African provinces- KwaZulu-Natal, Eastern Cape, Western Cape and Northern Cape - all **border the Atlantic or Indian Oceans**. Many beaches include trained lifeguards and options for snorkelling, deep sea diving, shark cage diving and whale and dolphin excursions.

Mountains

From the flattest to the tallest to the oldest to prettiest to the most dramatic, South African mountain ranges are astounding. The **highest mountain in South Africa** is 3,450 metres (11,320 ft) high Mafadi, located on the border of South Africa and Lesotho. The most famous is Table Mountain which is one of the **New 7 Wonders of The World**.

GOVERNMENT SUPPORT

Incentives

the dti
Department:
Trade and Industry
REPUBLIC OF SOUTH AFRICA

South Africa's cost competitiveness - relative to the source markets and other competing locations - has been further augmented and enhanced by the Global Business Services (GBS) incentive programme (effective 1 January 2019) by the Department of Trade and Industry (dti).

investSA
ONE STOP SHOP

The programme introduces a number of new features aligning the incentives to South Africa'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 creation.

*Base incentives are determined at the application stage depending on the fully-loaded operating costs of complex or non-complex jobs.
The bonus incentive for non-complex jobs is available to applicants that create and maintain more than 400 offshore jobs over a five year period.
The bonus incentive for complex jobs is available to applicants that create and maintain more than 200 offshore jobs.
For more detailed information regarding the incentives, explanations for complex and non-complex jobs and the terms and conditions of the incentives programme please download the documents below.

GOVERNMENT SUPPORT

Key Incentives	Description
Employment Tax Incentive (ETI)	• The ETI is an incentive aimed at encouraging employers to hire young work seekers • It reduces the employer's cost of hiring young people through a cost-sharing mechanism with the government – It allows the employer to reduce the amount of "Pay-As-You-Earn" (PAYE), which is the tax that employers must deduct from the income of employees as a form of advance payment on taxes due while leaving the wage of the employee unaffected – Employers will be able to claim the incentive for a 24-month period for all employees who qualify
SEZ Incentive	• SEZ incentives include: – Preferential 15% corporate tax: Reduced rate of corporate income taxation – Building Allowance: An accelerated 10-year tax allowance on buildings – Employment Incentive: Tax relief for employers employing low-salaried employees – Customs Controlled Area: VAT & customs relief for businesses and operators located within a customs-controlled area
Seda Technology Programme (STP)	• STP has two main objectives: – To provide technology transfer services to small enterprises – To provide specific technology support to women-owned enterprises • STP offers financial assistance in the form of a non-repayable grant up to a maximum of **R600,000 per project**

QUESTIONS

Contact BPESA South Africa

NATIONAL

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