

AFRICAN MARKET TRENDS IN TECHNOLOGY SERVICES

COUNTRY PROFILES



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About the report

Few studies examine information technology and business process management in Africa. This report, based on research and interviews, analyses the tech sectors of 11 African countries and examines enabling factors such as information and communication technology infrastructure, government incentives and the regulatory environment. One key finding is that trade and retail, financial services, healthcare and agriculture offer the most opportunities for tech firms.

This publication shares insights that will guide companies interested in offering information technology and business process outsourcing services in Africa. The report is also valuable for stakeholders, including tech hubs and start-ups, investors and government organizations.

Publisher: International Trade Centre

Title: African Market Trends in Technology Services: 11 Country Profiles

Publication date and place: Geneva, November 2020

Page count: 210

Language: English

ITC Document Number: SEC-20-49.E

Citation: International Trade Centre (2020). *African Market Trends in Technology Services: 11 Country Profiles*, ITC, Geneva.

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Foreword

Information and communications technology, including information technology (IT) and business process management (BPM) companies, has played a central role in the fast-paced transformation of the African continent. It accounts for 6%–10% of service exports in most African economies.

While large economies such as Kenya, Nigeria and South Africa have made great strides in developing next-generation mobile and digital networks, many smaller African countries still have some way to go. Many of these countries have made rapid advances in mobile phone and mobile internet penetration, as this report shows. Yet overall tech infrastructure remains underdeveloped and the base of IT and BPM suppliers remains narrow.

Before the COVID-19 crisis, tech consultancy Gartner predicted that global IT spending would reach a record \$3.9 trillion in 2020, led by software and applications development and related services. Because of the pandemic, the forecast has been revised downwards to \$3.6 trillion, down by 5.4% from 2019. Nevertheless, experts expect a substantial rebound in 2021, given that enterprises that embrace digital technologies will be central to the recovery.

The pandemic has indeed acted as a digitalization booster. It highlights the importance of distributing risk geographically to cope with crises. And with social distancing, offsite delivery of services and outsourcing are more essential than ever. This gives African countries a chance to grab a bigger share of the highly competitive IT/BPM markets.

Firms across the continent are bringing ingenious business models and innovation to the digital technology sector, by adapting business models to new requirements and revamping their offerings.

This publication reviews the IT/BPM service offerings and conditions in 11 African countries, including enabling factors such as government incentives and the regulatory environment. The countries were selected for an overview of tech markets in sub-Saharan Africa, with factors such as maturity and regional diversity taken into account. The report finds that trade and retail, financial services, healthcare and agriculture promise the greatest opportunities for these tech markets.

The report showcases why investing in the tech sector makes economic sense. It consolidates analysis to support entrepreneurs eager to make the next export move. We hope that small African businesses, start-up founders and managers, and governments seeking to stimulate trade in services, will find value in the report.

This publication has been made possible through a joint effort by the International Trade Centre (ITC) and Avasant, a global management consultancy. We hope it inspires investment in an ecosystem that allows the tech sector to grow and prosper.



Pamela Coke-Hamilton
Executive Director,
International Trade Centre

Acknowledgements

This report was prepared by a team led by Martin Labbé under the supervision and guidance of Robert Skidmore.

Martin Labbé and Milou van Bruggen (both ITC) coordinated the report, which was developed in cooperation with Avasant, a global management consulting firm. Srinivas Krishna, partner, UK & EMEA; Akshay Khanna, partner and global lead, Avasant Labs; Avijit Dixit, senior consultant; and Shael Roopchand, consultant, researched and wrote the report. Special thanks to Saurabh Sharma and Shola Adenekan of Avasant Africa for their valuable input.

Natalie Domeisen and Anne Griffin (both ITC) oversaw quality and production management. Jennifer Freedman edited the report. Franco Iacovino (ITC) provided graphic and digital printing support.

Contents

About the report.....	i
Foreword.....	v
Acknowledgements.....	vii
Acronyms.....	viii
Executive summary.....	x

CHAPTER 1 A STORY OF GROWTH 1

Governments build up infrastructure	1
Tech industry is very competitive	2

CHAPTER 2 COMPREHENSIVE COUNTRY ANALYSES..... 5

Kenya	9
Nigeria	27
South Africa	47
Côte d'Ivoire.....	68
Democratic Republic of the Congo.....	88
United Republic of Tanzania	105
Zambia.....	119
Uganda	134
Benin	153
Mali.....	166
Burkina Faso.....	183

Master list of tables and figures

Each of the 11 country profiles includes tables and figures with information on the following:

- Gross domestic product composition
- Key facts about the country
- Highlights on domestic economics and key sectors
- ICT service export growth
- Highlights on the attractiveness of the domestic tech sector
- Tech hubs and parks
- Services offered by technology providers
- Talent and employability
- Telecommunications landscape
- Broadband landscape
- Power supply landscape
- Incentives to support business development
- Business registration procedure
- Regulatory and compliance policies for foreign investors
- Key associations in the technology sector
- Major industries with high potential to generate demand for IT/BPM services
- Market access opportunities and potential service areas

In addition, the country profiles on Kenya, Nigeria, South Africa, United Republic of Tanzania, Zambia and Uganda include:

- The sector share of GDP

The country profile on Côte d'Ivoire also includes:

- Networked Readiness Index ranking
- ICT environment subindex ranking

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