

## **MEA Business Process Outsourcing (BPO) Market - Industry Trends and Forecast to 2030**

Market Report | 2023-01-01 | 289 pages | Data Bridge Market Research

### **AVAILABLE LICENSES:**

- Single User License \$3500.00
- Corporate Users License \$4200.00

### **Report description:**

MEA Business Process Outsourcing (BPO) Market is projected to register a CAGR of 7.1% in the forecast period of 2023 to 2030. The new market report contains data for the historic year 2022, the base year of calculation is 2022, and the forecast period is 2023 to 2030

### **Market Segmentation:**

MEA Business Process Outsourcing (BPO) Market is segmented into by Outsourcing Type (Offshore, Nearshore, Onshore), by Application (Customer Care, Finance and Accounting, Human Resource, Sales and Marketing, Procurement and Supply Chain, Facilities and Administration, Product Engineering, Training, Others), by Deployment Mode ( On-Premise, Cloud), by Organization Size (Large Enterprises, SMES), by location ( Onsite, Offsite, Offshore), by Outsourcing Approach (Best-Shore, Bundled Services, Contract Based, Fee For Service), by End-User(BFSI, IT & telecom, healthcare, manufacturing, retail & ecommerce, government & defense, transportation & logistics, travel & hospitality, education, energy & utilities, and others). Each of the segment is further sub-segmented by application into Human Resource, Sales and Marketing, Finance & Accounting, Procurement and Supply Chain, Facilities and Administrations, Customer Care, Training, Producty Engineering, Country (UAE, Saudi Arabia, South Africa, Egypt, Israel, Rest of Middle East and Africa) Industry Trends and Forecast to 2030.

Some of the major factors contributing to the growth of the market are:

- Instead of buying IT equipment and hiring more employees to do different tasks, BPO can outsource the tasks to a service provider, reducing or even eliminating overhead costs
- Transferring non-core processes to a BPO company gives the organization more time to focus on its main business activities
- If an organization decides to enter an overseas market, some activities that require local market knowledge, national law expertise, or fluency in a foreign language can be assigned to a BPO company
- BPO companies are experienced in different fields and perform at the highest level

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## Market Players

Some of the major players operating in the market are:

- Cognizant
- Accenture
- IBM Corporation
- Capgemini
- Infosys Limited
- Concentrix Corporation
- NTT DATA Corporation
- Genpact
- Conduent, Inc.
- ADP, Inc.
- HCL Technologies Limited
- Wipro Limited
- Tata Consultancy Services Limited
- NCR Corporation
- Sodexo
- Amdocs

## Table of Contents:

### TABLE OF CONTENTS

1 INTRODUCTION	54
1.1 OBJECTIVES OF THE STUDY	54
1.2 MARKET DEFINITION	54
1.3 OVERVIEW OF THE MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET	54
1.4 LIMITATIONS	56
1.5 MARKETS COVERED	57
2 MARKET SEGMENTATION	61
2.1 MARKETS COVERED	61
2.2 GEOGRAPHICAL SCOPE	62
2.3 YEARS CONSIDERED FOR THE STUDY	63
2.4 CURRENCY AND PRICING	63
2.5 DBMR TRIPOD DATA VALIDATION MODEL	64
2.6 MULTIVARIATE MODELLING	67
2.7 OUTSOURCING TYPE LIFELINE CURVE	67
2.8 MARKET END-USER COVERAGE GRID	68
2.9 PRIMARY INTERVIEWS WITH KEY OPINION LEADERS	69
2.10 DBMR MARKET POSITION GRID	70
2.11 VENDOR SHARE ANALYSIS	71
2.12 SECONDARY SOURCES	72
2.13 ASSUMPTIONS	72
3 EXECUTIVE SUMMARY	73
4 PREMIUM INSIGHTS	76

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

4.1 PORTERS ANALYSIS	77
4.2 EVOLUTION	78
4.3 VALUE CHAIN ANALYSIS	79
5 REGIONAL SUMMARY	80
6 MARKET OVERVIEW	81
6.1 DRIVERS	83
6.1.1 INCREASING NEED FOR BUSINESS AGILITY	83
6.1.2 RISING CUSTOMER FOCUS TOWARD ENHANCED EFFICIENCY, TIME EFFECTIVENESS, AND COST EFFICIENCY	83
6.1.3 GROWING PREFERENCE FOR CLOUD TECHNOLOGY AND ITS SIGNIFICANCE ON PROCESS AUTOMATION	84
6.1.4 INCREASING DEPENDENCE ON SALES AND MARKETING FOR CUSTOMER SERVICE ENHANCEMENT	85
6.1.5 UPSURGE IN THE CAPACITY OF QUALITY ENTERPRISE DATA	86
6.2 RESTRAINTS	86
6.2.1 GROWING CONCERNS REGARDING DATA SECURITY AND PRIVACY CONCERN	86
6.2.2 STRINGENT GOVERNMENT REGULATIONS	87
6.3 OPPORTUNITIES	88
6.3.1 FOCUS ON MULTI-WORKFLOW SCHEDULING OF BUSINESS	88
6.3.2 EMERGENCE OF DIGITAL TECHNOLOGIES, NAMELY AI, IOT, AND CLOUD COMPUTING	88
6.3.3 INCREASE IN THE ESTABLISHMENT OF SERVICE CENTERS AND IT SECTOR SPENDING	89
6.3.4 GROWING NUMBER OF START-UPS PARTNERING WITH BUSINESS PROCESS OUTSOURCING (BPO)	90
6.4 CHALLENGES	91
6.4.1 LACK OF SKILLED WORKFORCE AND HIGH ATTRITION RATE	91
6.4.2 FREQUENT DISRUPTION AFFECTS THE OPERATIONAL EFFICIENCY OF BUSINESS PROCESS OUTSOURCING (BPO)	91
6.4.3 INCREASE IN THE PRESENCE OF NEW ENTRANTS	92
7 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET, BY OUTSOURCING TYPE	93
7.1 OVERVIEW	94
7.2 OFFSHORE	95
7.3 ONSHORE	95
7.4 NEARSHORE	96
8 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET, BY SERVICE	97
8.1 OVERVIEW	98
8.2 VOICE PROCESSING	99
8.2.1 INBOUND	100
8.2.2 OUTBOUND	100
8.2.3 SURVEY AND MARKET RESEARCH	100
8.3 TELEMARKETING SERVICES	100
8.4 IMAGE EDITING SERVICES	101
8.5 VIRTUAL STAFFING SERVICES	102
8.6 3D VISUALIZATION SERVICES	102
8.6.1 3D ANIMATION	103
8.6.2 CAD MODELING	103
8.6.3 3D ILLUSTRATION	103
8.6.4 3D DEVELOPMENT	103
9 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET, BY APPLICATION	104
9.1 OVERVIEW	105
9.2 CUSTOMER CARE	106
9.3 FINANCE AND ACCOUNTING	107
9.4 HUMAN RESOURCE	107

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

9.5 SALES AND MARKETING	108
9.6 PROCUREMENT AND SUPPLY CHAIN	109
9.7 FACILITIES AND ADMINISTRATION	109
9.8 PRODUCT ENGINEERING	110
9.9 TRAINING	111
9.10 OTHERS	111
10 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET, BY DEPLOYMENT MODE	113
10.1 OVERVIEW	114
10.2 CLOUD	115
10.3 ON PREMISE	116
11 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET, BY ORGANIZATION SIZE	117
11.1 OVERVIEW	118
11.2 LARGE ENTERPRISES	119
11.3 SMES	120
12 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET, BY OWNERSHIP	121
12.1 OVERVIEW	122
12.2 CAPTIVE	123
12.3 THIRD PARTY	124
13 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET, BY OUTSOURCING APPROACH	125
13.1 OVERVIEW	126
13.2 CONTRACT BASED	127
13.3 BUNDLED SERVICES	128
13.4 BEST-SHORE	128
13.5 FEE FOR SERVICE	129
14 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET, BY END USER	130
14.1 OVERVIEW	131
14.2 IT AND TELECOMMUNICATION	132
14.2.1 CUSTOMER CARE	133
14.2.2 SALES AND MARKETING	133
14.2.3 TRAINING	133
14.2.4 HUMAN RESOURCE	134
14.2.5 FACILITIES AND ADMINISTRATION	134
14.2.6 OTHERS	134
14.3 BFSI	134
14.3.1 FINANCE AND ACCOUNTING	135
14.3.2 CUSTOMER CARE	135
14.3.3 SALES AND MARKETING	135
14.3.4 HUMAN RESOURCE	135
14.3.5 FACILITIES AND ADMINISTRATION	135
14.3.6 TRAINING	135
14.3.7 OTHERS	136
14.4 MANUFACTURING	136
14.4.1 CUSTOMER CARE	137
14.4.2 SALES AND MARKETING	137
14.4.3 PROCUREMENT AND SUPPLY CHAIN	137
14.4.4 PRODUCT ENGINEERING	137
14.4.5 HUMAN RESOURCE	137

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

14.4.6	FACILITIES AND ADMINISTRATION	138
14.4.7	TRAINING	138
14.4.8	FINANCE AND ACCOUNTING	138
14.4.9	OTHERS	138
14.5	HEALTHCARE	138
14.5.1	CUSTOMER CARE	139
14.5.2	SALES AND MARKETING	139
14.5.3	FACILITIES AND ADMINISTRATION	139
14.5.4	PROCUREMENT AND SUPPLY CHAIN	139
14.5.5	TRAINING	139
14.5.6	OTHERS	139
14.6	GOVERNMENT & DEFENSE	140
14.6.1	CUSTOMER CARE	141
14.6.2	FINANCE AND ACCOUNTING	141
14.6.3	SALES AND MARKETING	141
14.6.4	HUMAN RESOURCE	141
14.6.5	FACILITIES AND ADMINISTRATION	141
14.6.6	TRAINING	141
14.6.7	OTHERS	141
14.7	RETAIL AND E-COMMERCE	141
14.7.1	CUSTOMER CARE	142
14.7.2	SALES AND MARKETING	142
14.7.3	PROCUREMENT AND SUPPLY CHAIN	142
14.7.4	HUMAN RESOURCE	143
14.7.5	FACILITIES AND ADMINISTRATION	143
14.7.6	TRAINING	143
14.7.7	OTHERS	143
14.8	TRANSPORTATION AND LOGISTICS	143
14.8.1	CUSTOMER CARE	144
14.8.2	PROCUREMENT AND SUPPLY CHAIN	144
14.8.3	SALES AND MARKETING	144
14.8.4	FINANCE AND ACCOUNTING	144
14.8.5	FACILITIES AND ADMINISTRATION	144
14.8.6	TRAINING	145
14.8.7	OTHERS	145
14.9	TRAVEL AND HOSPITALITY	145
14.9.1	SALES AND MARKETING	146
14.9.2	CUSTOMER CARE	146
14.9.3	FACILITIES AND ADMINISTRATION	146
14.9.4	TRAINING	146
14.9.5	OTHERS	146
14.10	ENERGY AND UTILITIES	147
14.10.1	CUSTOMER CARE	148
14.10.2	OTHERS	148
14.11	EDUCATION	148
14.11.1	SALES AND MARKETING	149
14.11.2	CUSTOMER CARE	149

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

14.11.3 FACILITIES AND ADMINISTRATION	149
14.11.4 TRAINING	149
14.11.5 OTHERS	149
14.12 OTHERS	150
15 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET, BY REGION	151
15.1 MIDDLE EAST AFRICA	152
15.1.1 U.A.E.	164
15.1.2 SAUDI ARABIA	172
15.1.3 SOUTH AFRICA	180
15.1.4 EGYPT	188
15.1.5 REST OF MIDDLE EAST AND AFRICA	203
16 MIDDLE EAST & AFRICA BUSINESS PROCESS OUTSOURCING (BPO) MARKET: COMPANY LANDSCAPE	204
16.1 COMPANY SHARE ANALYSIS: MIDDLE EAST & AFRICA	204
17 SWOT ANALYSIS	205
18 COMPANY PROFILE	206
18.1 ACCENTURE	206
18.1.1 COMPANY SNAPSHOT	206
18.1.2 REVENUE ANALYSIS	206
18.1.3 COMPANY SHARE ANALYSIS	207
18.1.4 SERVICE PORTFOLIO	207
18.1.5 RECENT DEVELOPMENTS	208
18.2 INFOSYS LIMITED	209
18.2.1 COMPANY SNAPSHOT	209
18.2.2 REVENUE ANALYSIS	209
18.2.3 COMPANY SHARE ANALYSIS	210
18.2.4 SERVICE PORTFOLIO	210
18.2.5 RECENT DEVELOPMENTS	211
18.3 CAPGEMINI	212
18.3.1 COMPANY SNAPSHOT	212
18.3.2 REVENUE ANALYSIS	212
18.3.3 COMPANY SHARE ANALYSIS	213
18.3.4 SERVICE PORTFOLIO	213
18.3.5 RECENT DEVELOPMENTS	214
18.4 IBM CORPORATION	215
18.4.1 COMPANY SNAPSHOT	215
18.4.2 REVENUE ANALYSIS	215
18.4.3 COMPANY SHARE ANALYSIS	216
18.4.4 SERVICE PORTFOLIO	216
18.4.5 RECENT DEVELOPMENTS	217
18.5 COGNIZANT	218
18.5.1 COMPANY SNAPSHOT	218
18.5.2 REVENUE ANALYSIS	218
18.5.3 COMPANY SHARE ANALYSIS	219
18.5.4 SERVICE PORTFOLIO	219
18.5.5 RECENT DEVELOPMENTS	221
18.6 ADP, INC.	222
18.6.1 COMPANY SNAPSHOT	222

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

18.6.2	REVENUE ANALYSIS	222
18.6.3	SOLUTION PORTFOLIO	223
18.6.4	RECENT DEVELOPMENTS	223
18.7	AIDEY	224
18.7.1	COMPANY SNAPSHOT	224
18.7.2	SERVICE PORTFOLIO	224
18.7.3	RECENT DEVELOPMENTS	225
18.8	ALAC ETOILE	226
18.8.1	COMPANY SNAPSHOT	226
18.8.2	SERVICES PORTFOLIO	226
18.8.3	RECENT DEVELOPMENT	226
18.9	AMDOCS	227
18.9.1	COMPANY SNAPSHOT	227
18.9.2	REVENUE ANALYSIS	227
18.9.3	SERVICE PORTFOLIO	228
18.9.4	RECENT DEVELOPMENTS	228
18.10	CBRE	229
18.10.1	COMPANY SNAPSHOT	229
18.10.2	REVENUE ANALYSIS	229
18.10.3	SERVICES PORTFOLIO	230
18.10.4	RECENT DEVELOPMENTS	230
18.11	CONCENTRIX CORPORATION	231
18.11.1	COMPANY SNAPSHOT	231
18.11.2	REVENUE ANALYSIS	231
18.11.3	SOLUTION PORTFOLIO	232
18.11.4	RECENT DEVELOPMENTS	232
18.12	CONDUENT, INC.	233
18.12.1	COMPANY SNAPSHOT	233
18.12.2	REVENUE ANALYSIS	233
18.12.3	SOLUTION PORTFOLIO	234
18.12.4	RECENT DEVELOPMENTS	234
18.13	ENOAH	235
18.13.1	COMPANY SNAPSHOT	235
18.13.2	SERVICES PORTFOLIO	235
18.13.3	RECENT DEVELOPMENT	236
18.14	EXLSERVICE HOLDINGS, INC.	237
18.14.1	COMPANY SNAPSHOT	237
18.14.2	REVENUE ANALYSIS	237
18.14.3	SERVICE PORTFOLIO	238
18.14.4	RECENT DEVELOPMENTS	239

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**MEA Business Process Outsourcing (BPO) Market - Industry Trends and Forecast to 2030**

Market Report | 2023-01-01 | 289 pages | Data Bridge Market Research

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$3500.00
	Corporate Users License	\$4200.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-22"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com