



**20
25** | **COMPANY
OF THE YEAR**
Driving impact across the customer value chain

*RECOGNIZED FOR BEST PRACTICES IN THE
AFRICAN OUTSOURCING INDUSTRY*

F R O S T & S U L L I V A N

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Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. TP excels in many of the criteria in the CX management outsourcing space.

RECOGNITION CRITERIA	
Visionary Innovation & Performance	Customer Impact
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

The Transformation of the Outsourcing Industry

The African outsourcing market is emerging as a dynamic and promising frontier for global outsourcing, fueled by a combination of favorable demographics, rapid digital adoption, and strong government support. Countries such as Kenya, Nigeria, South Africa, and Rwanda are developing vibrant technology

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- Bernardin Arnason
Industry Director

(tech) ecosystems that support the delivery of high-quality, multilingual services across digital and traditional channels. With a predominantly young, tech-savvy population and a mobile-first culture, Africa is well-equipped to meet the growing demand for scalable and flexible customer support. Competitive labor costs, increasing cloud adoption, and time zone alignment with Europe further enhance the continent’s attractiveness for nearshore delivery, while initiatives like the African Continental Free Trade Area promote regional integration and facilitate cross-border service expansion.

Despite these strengths, Africa faces significant challenges that can impede its growth as a leading CXM hub. Infrastructure inconsistencies (e.g., unreliable electricity and internet connectivity) remain critical obstacles in several regions, potentially disrupting service continuity. Additionally, skill gaps in advanced CX tools and platforms limit the

scalability and sophistication of service offerings. Language and accent differences also impact client satisfaction in markets demanding neutral or multilingual communication. Regulatory challenges, including aligning with global data protection standards like General Data Protection Regulation and navigating complex cross-border payment systems, add further operational challenges. Moreover, Africa must contend with entrenched perceptions of instability and uneven service quality, especially compared to established outsourcing powerhouses like India and the Philippines, which benefit from long-standing client trust and brand recognition.

To capitalize on its unique advantages and overcome these hurdles, Africa's outsourcing sector requires targeted investments in infrastructure resilience, comprehensive workforce development, and regulatory harmonization. Strategic partnerships with global technology providers and active government involvement are shaping favorable business environments, which will become essential. Furthermore, focused branding and marketing efforts highlighting success stories and Africa's multilingual, cost-efficient workforce can help shift global perceptions and build stronger international trust. By addressing these challenges and leveraging emerging trends, Africa stands poised to secure a significant and sustainable role in the global outsourcing market.

TP: Closing CX Gaps with Intelligent Design

Founded in 1978 and headquartered in Paris, France, TP is a leading multinational business process outsourcing company that specializes in a wide range of services, including digital transformation, customer care, technical support, debt collection, sales, visa processing services and back-office services,

"As a trusted first mover in many regions, TP plays a formative role in shaping the outsourcing industry landscape across Africa. It sets operational benchmarks, influences public policy, and secures access to senior policymakers, demonstrating a level of engagement that elevates it from service provider to strategic partner."

- Samantha Fisher
Best Practices Research Analyst

among others. It also leads in the CXM space, addressing the longstanding gaps in the industry with a fusion of technological innovation and strategic geographic expansion, with more than 58 sites, 34,000 workstations, and a workforce of more than 50,000 in Africa. Rather than offering siloed tools or reactive support services, TP's comprehensive digital ecosystem anticipates market shifts and creates adaptive, emotionally intelligent solutions. This approach allows businesses to move beyond transactional service models and embrace deeper,

more effective engagement with their audiences.

Through a forward-looking blend of generative artificial intelligence (GenAI), emotional intelligence, and hyper-automation, TP enables brands to scale personalization, shorten resolution times, and gain predictive insight into customer behavior and operational performance. These capabilities are applicable as part of a unified architecture that balances automation with human touch, differentiating from competing solutions that do so in isolation. The result is a more intuitive, accurate, and emotionally attuned service experience that resonates with end users and drives long-term brand loyalty. By embedding emotional intelligence into GenAI (capable of analyzing tone, sentiment, and intent), the company delivers a distinctly human-like interaction model that helps businesses bridge the empathy gap often found in traditional service environments.

Moreover, TP's regional strategy underscores its commitment to solving longstanding access and scalability limitations within the industry. The company's targeted expansion into Africa, which includes leveraging multilingual hubs in Egypt, Morocco, Tunisia, South Africa, and new footprints in Kenya and Ghana, is unlocking new talent pipelines and reducing dependency on oversaturated markets. These locations offer language versatility, economic resilience, and operational cost-efficiency, allowing TP to serve emerging and mature markets more effectively. In doing so, the company fulfills rising demand in previously underserved areas while also contributing to broader economic development goals, aligning business value with social impact.

Strategic Scenarios Shaping the Future of outsourcing in Africa

TP actively leverages megatrends (e.g., digital transformation, public sector modernization, and the globalization of business process outsourcing) to position Africa at the core of its long-term growth strategy. By identifying the continent as a high-potential region, the company aligns itself with major shifts in how governments and businesses deliver services through digital platforms. TP partners directly with national stakeholders, including in Kenya, where it engages in ongoing discussions to digitize public services. These efforts reflect a deliberate strategy to support and accelerate systemic change rather than react to short-term market pressures.

With strong growth rates in the region, TP does more than capture demand; it actively shapes the market. The company drives digital transformation across the continent by embedding itself within local ecosystems and aligning operations with broader societal goals. TP also expands into emerging economies like Rwanda and Ethiopia, anticipating favorable demographic trends and seizing early-mover advantages.

By positioning Africa as a vital "third leg" of its global delivery model (alongside established offshore hubs), TP strengthens its ability to support complex operations in mature markets like the United States (US) while tailoring services to local contexts through culturally aligned, nearshore models. Through these actions, the company sets the pace of megatrends. It crafts a forward-looking, multi-source strategy that integrates global priorities with Africa's unique strengths, demonstrating a bold, proactive approach to future growth.

Strategic Scenarios Driving Sustainable Growth

TP's leadership strategy in Africa reflects a bold, purpose-led approach that blends commercial ambition with a deep commitment to social and economic development. By entering emerging markets with the clear objective of becoming the leading operator in scale, job quality, and workforce development, the company sets a high bar for sustainable growth. Its leadership goes beyond operational excellence; TP collaborates consistently with African governments on shared priorities such as youth employment, creating ripple effects that strengthen local economies and align with national development goals.

As a trusted first mover in many regions, TP plays a formative role in shaping the outsourcing industry landscape across Africa. It sets operational benchmarks, influences public policy, and secures access to senior policymakers, demonstrating a level of engagement that elevates it from service provider to strategic partner. This approach positions the company as a catalyst for inclusive development, embedding it within the socio-economic fabric of the continent. TP's modern leadership model is proactive, collaborative, and value-driven, exemplifying how businesses can pursue growth and social

impact in tandem.

Globally, TP reinforces this leadership stance through continuous operational refinement and strategic integration. The successful merger with Majorel remains on track, with the company targeting €20 to €30 million in cost synergies by 2025, building on the €94 million already achieved in 2024.¹ TP is also advancing the reorganization of its French operations through a majority-backed Voluntary Departure Plan, now awaiting final regulatory approval. Meanwhile, its Specialized Services segment demonstrates resilience amid market headwinds, with revenue growth of 10.7% reported.² The acquisition and full integration of ZP, a US-based provider of language services for the deaf and hard of hearing, further strengthens this business line, supported by a dedicated synergy and integration plan.

Best Practices Driving Best-in-class Performance

TP's African operations exemplify a disciplined application of global best practices, adapted to meet the demands of a rapidly evolving outsourcing landscape. The company transitioned beyond its technical support roots to offer a diversified portfolio that includes customer care, content moderation, trust and safety, banking, financial services, and insurance support. By integrating AI-assisted, human-supervised workflows, particularly in sensitive areas like content moderation and data annotation, TP sets a high standard for scalable, secure, and high-quality service delivery through its "human-in-the-loop" model. This shift highlights the company's responsiveness to client needs and its commitment to innovation-led service evolution.

Low attrition and absenteeism reinforce operational excellence, especially in high-compliance sectors, reflecting a people-first management approach and robust governance. TP's "managed by locals" philosophy ensures that leadership remains culturally attuned and responsive to regional dynamics. Local managers in Morocco, Senegal, and South Africa bring critical insights to operations while tailored training (e.g., industry-specific programs in Morocco's utility and pay-television sectors) enhances fluency and reduces friction. The company also prioritizes clients through empathy and contextual understanding, further elevating service quality.

Beyond operational metrics, TP fosters workforce cohesion and long-term sustainability through cultural adaptability and environmental responsibility. Rather than imposing uniform structures, the company promotes a pan-African identity that values inclusion and collaborations across national lines. This approach supports seamless cross-border team integration, such as the deployment of Nigerian agents in Kenya, contributing to employee satisfaction and consistent performance. In parallel, TP leads on sustainability through eco-conscious facilities like its solar-powered site in Kenya and low-emission initiatives in South Africa. By integrating environmental stewardship with strong cultural and operational frameworks, the company positions itself as a forward-looking, ethical leader in Africa's outsourcing sector.

¹ "Teleperformance: Quarterly Information as of March 31, 2025." Press release. *Business Wire*. 30 April 2025.

<https://www.businesswire.com/news/home/20250430224018/en/Teleperformance-Quarterly-Information-as-of-March-31-2025> Accessed 27 June 2025.

² Ibid

Unlocking Value in Emerging CX Markets

TP's expansion across Africa illustrates a deliberate and well-structured growth strategy anchored in rising demand, collaborative government partnerships, and the strategic utilization of local talent. South Africa serves as a flagship example, with the company's workforce expanding from around 400 employees in 2019 to a projected 10,000 by 2025.³ Other key markets mirror this growth, such as Kenya, Nigeria, and Ghana, where TP continues to secure long-term client contracts and invest in high-quality infrastructure. These investments, including advanced facilities, demonstrate the company's commitment to delivering operational excellence and sustaining regional scalability.

Sub-Saharan Africa, particularly South Africa, is pivotal in TP's regional momentum, acting as a core contributor to growth and innovation. The company's presence in these markets is characterized by physical expansion and strategic alignment with national development objectives. Strong partnerships with government bodies facilitate initiatives in workforce development, youth employment, and the digitization of public services. This trusted positioning elevates TP from a traditional CXM vendor to a value-generating partner embedded in the socio-economic progress of the countries it serves.

Africa evolved from a peripheral support location into a vital engine of TP's global delivery model. The region now addresses emerging local needs and sophisticated demands from mature markets like the US, highlighting its dual-market capability. The company's strength lies in its ability to combine operational expertise with culturally relevant talent strategies, enabling seamless service delivery across verticals such as business, financial services, and insurance, customer care, trust and safety. By pairing infrastructure investment with adaptive leadership and long-term vision, TP sets a new standard for inclusive, resilient, and future-ready outsourcing services on the African continent.

Quality and Affordability in a Perfect Balance

TP offers a holistic and differentiated approach to outsourcing in Africa by combining long-term investment, cultural fluency, and a shared-value model with governments and communities. Early market entries in Morocco and Tunisia, which have evolved into vital hubs for French-language service, laid the foundation for a strategy built on trust and cultural alignment. Moreover, the company offers more than 60 language options. The company transforms transactional service delivery into meaningful, community-rooted value creation across the full customer lifecycle: purchase, service, and ownership.

This community-centric model is especially evident during the ownership phase, where TP invests heavily in workforce development, internal mobility, and social integration. The company's people-first philosophy empowers African markets to become cost-effective service locations, as well as innovation hubs for next-generation solutions like data annotation and AI support. Morocco exemplifies this approach, with 98% of management positions filled through internal promotion, fostering operational stability, loyalty, and service consistency.⁴ By aligning employment with local aspirations and national goals, TP delivers emotionally resonant, dependable services deeply embedded in the local context.

³ Frost & Sullivan Discussion with TP

⁴ Frost & Sullivan Discussion with TP

TP also enhances the purchase and service phases by combining proven global standards with authentic local engagement. Prospective clients visiting sites in Kenya or South Africa experience vibrant, secure environments that challenge outdated perceptions and build trust through transparency and firsthand interaction. The company's "Go Green" deployment model ports established workflows rapidly into new locations, ensuring efficient scale-up with minimal naturally empathetic and linguistically neutral communication style of African agents.

Driving Loyalty and Market Differentiation

TP maintains a resilient and influential brand strength that underpins its global leadership. The company built its robust equity on a foundation of global reach, consistent service quality, and a proven record of innovation. With operations in nearly 100 countries, more than 170 markets, and deep expertise across high-value verticals such as financial services, healthcare, and technology, TP earns widespread brand recognition.⁵ This visibility strengthens its reputation as a dependable, high-performance partner for enterprises operating in complex regulatory and customer engagement environments, making the TP brand synonymous with trust, scale, and reliability.

Central to the company's brand equity is its reputation for delivering high-quality, multilingual, and culturally aligned services. TP reinforces its decades-long track record through third-party certifications and a customer-centric approach, positioning it as a premium service provider. The operational model centers on continuous improvement through customer journey mapping, feedback integration, and tailored CXM design. This personalized, responsive approach fosters strong client loyalty, high retention rates, and long-term partnerships that drive predictable growth. Clients often expand their engagements with the company, viewing the brand as a strategic partner rather than a transactional vendor.

What further elevates TP's brand is its deep integration of innovation. The company's €100 million AI investment program for 2025, alongside strategic partnerships with agentic AI leaders like Sanas, Ema, and Parloa, reflects a bold commitment to redefining CX through technology.⁶ As the executive global integrator for Ema's "universal AI employee" platform, TP positions itself at the forefront of enterprise automation. Meanwhile, its collaboration with Parloa enhances multilingual voice support, combining scalable AI with human expertise. These initiatives enhance the company's image as a tech-forward, future-ready partner, one that meets market demands while also helping to shape the future of digital customer engagement.

⁵ Frost & Sullivan's Discussion with TP

⁶ "TP Helps organizations adopt and scale agentic AI with two new AI partnerships." Press release. TP. 30 April 2025. <https://www.tp.com/en-us/insights-list/press-releases/tp-helps-organizations-adopt-and-scale-agentic-ai-with-two-new-ai-partnerships/> Accessed 27 June 2025.

Conclusion

The African outsourcing market is expanding rapidly, presenting both opportunities and challenges such as cultural diversity, evolving technology demands, and the need for scalable, high-quality service delivery. TP has positioned Africa not just as an emerging support location, but as a core growth engine of its global delivery model. This strategy combines global best practices with deep local integration and strong government partnerships. By investing heavily in infrastructure and nurturing local talent, TP has transformed key markets like South Africa, Kenya, and Morocco into central hubs for a diverse range of high-value services, from customer care to AI-powered next-generation solutions. Culturally fluent teams and scalable operations tailored to meet evolving needs support this growth, positioning TP as a vital part of the global delivery ecosystem.

What truly differentiates TP from its competitors is its seamless blend of cutting-edge technology and empathetic human interaction. By integrating advanced automation with emotional intelligence, TP enhances customer interactions while preserving the personalized touch that clients expect. Coupled with a people-first culture, strong social impact initiatives, and a commitment to sustainability, this model delivers consistent, high-quality, and emotionally resonant experiences, setting a new standard in Africa's rapidly evolving outsourcing market.

By aligning People, Expertise, Technology and Excellence, TP not only drives Africa's growth as a global outsourcing hub but also reinforces its role as a trusted strategic partner for clients worldwide. With its strong overall performance, TP earns Frost & Sullivan's 2025 African Company of the Year Recognition in the outsourcing industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Company of the Year Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging mega trends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

VALUE IMPACT			
STEP		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

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DESIGN OPTIMIZATION EVALUATION

opportunities and uncover new opportunities



CEC Technical Advisors

...the ...

