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BPO SECTOR MARKETING AND INVESTMENT PROMOTION PLAN

**Participation in the 2nd Arab Outsourcing Conference in
Dubai, UAE, April 26-28, 2010**

18 July 2010

This publication was produced for review by the United States Agency for International Development. It was prepared by Rodrigo Zapata, Senior Consultant.

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UAE, April 26-28, 2010**

USAID JORDAN ECONOMIC DEVELOPMENT PROGRAM

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AUTHORS: RODRIGO ZAPATA, SENIOR CONSULTANT

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1.0 Introduction:

1. The 2nd **ARAB OUTSOURCING CONFERENCE 2010:** is a 3 day event organized by TCQ Triangle and sponsored by companies like Deloitte, SAP, Aegis and Wipro, which is programmed to take place April 26 to 28 in Dubai, UAE. The purpose of the Conference is to discuss Cost Savings and Efficiency in Performing Non-Core Business Functions; it will bring together leading International Consultants, Service Providers and Regional Outsourcing Professionals from a broad cross section of industries in the Middle East.

Companies in the Middle East are becoming very active on the Outsourcing front and are catching up with highly matured International Organizations. Globalization, cost pressures and increased competition has prompted a growing proportion of Middle Eastern Companies to expand their shared services and the range of business processes they are willing to outsource, both locally and offshore.

The Arab Outsourcing Conference presents a number of international outsourcing experts including: Abulrahman Al Tuwajiri (Head of HR – Saudi Aramco); Andre Verdier (CTO MEA – MRM Global); Barry Mathews (Head of IT Outsourcing Cloud sourcing Practice - UK Alsbridge PLC); Carol Jansma (Global Strategic Procurement – DP World UAE); Dr. Dirk Butcha (Head of A.T.Kearney Middle East); Farid Ahmed (Head of HR – Nokia Siemens Network) among others.

Part of the conference will include a sole speaker session entitled “Jordan as a destination for outsourcing and shared services” as well as site visits to outsourcing companies in Dubai in addition to Dubai Outsourcing Zone.

Additional information on the Conference can be found in the following WEB Page: www.arab-outsourcing.com.

2. **Audience:** CEOs; CFOs; CIOs; General Managers, Managing Directors; VPs and Heads of IT, Outsourcing, Business Process Management, Shared Services, Logistics, Finance, Support Services, Strategic Sourcing, etc, of Middle Eastern Public and Private Sector Organizations; Regional and International Outsourcing Service Providers; Outsourcing Destination Promotion Authorities and Governments and Outsourcing Consultants and Lawyers.
 - **Country presentations:** the Conference program contemplates a series of Country Speaker Sessions for countries that wish to promote their image or convey a message to the audience in relation to business opportunities.
 - **Booths:** the Conference offers the possibility of having a booth as a base for promotion and more personal exchange with interested visitors.
3. **Participation Objectives:** the participation by DZC in the Arab Outsourcing Conference 2010 has two objectives:

- Build the image of Jordan as the ideal site for establishing BPO operations to serve the near-shore market of the Middle East, Mediterranean and Africa (MEMA).
- Generate investment leads that could end up in First Time Site Visits to Jordan to consider the possibility of doing business.

2.0 Objectives:

- **The first objective** is aimed at building Jordan's image as the ideal site for establishing BPO operations directed at the Arab speaking markets of the GCC; North Africa; Levant and Europe. The prospective investors would be a) Indian or International BPO service vendor companies that would offer their services to Multinational companies or b) companies wanting to have their own captive BPO operation located at mid-point between India and the near-shore markets to offer services in Arab language.

According to the recently conducted demand assessment, the four vertical sectors with greatest possibility for BPO promotion in Jordan would be:

- Financial Services including Banking and Insurance companies.
- Telecommunications and IT.
- Travel and hospitality.
- Retail, e-Commerce and marketing services.

In order to achieve this objective, it is necessary to accomplish 2 goals:

- **Get DZC's "act" together:** which means:
 1. Creating a core investment promotion organization within the DZC that will have the responsibility and will be accountable for the success of this event and for the entire outreach and follow up program.
 2. Putting together a motivated public-private delegation to attend the Conference.
 3. Pre-approving the UNIFIED Value Proposition message.
 4. Making sure that the participants in the delegation have very specific roles and functions to fulfill.
 5. Ensuring that previously agreed upon participation protocols are designed and communicated to the parties.
- **Learn by doing:** this means the following:
 1. That the DZC's investment promotion team will take advantage of this event to practice the techniques of targeted investment promotion, which are generally applicable to the BPO sector or any other sector of promotion.
 2. That the DZC's investment promotion team will obtain and process feedback from the audience in order to improve their promotion practices, thus creating a virtuous circle of learning and improvement.

DZC's participation in the Arab Outsourcing Conference will mark the launching of DZC's aggressive, consistent and continuous targeted investment promotion outreach and follow up program.

- **The second objective** consists of the generation of investment leads in the BPO sector in Jordan.

In order to achieve this objective, it is necessary to accomplish three things:

- **Present Jordan's Value Proposition** which should constitute a clear, unified message to be delivered to a qualified general audience of potential investors. This audience will be composed of those Conference attendees who decide to attend the Jordan speaker session. The message should be delivered by a high level official of the DZC (preferably by the DZC Chief Commissioner or the Commissioner for Investor Services and Development).

If possible, it would be desirable to begin the presentation with a short video message from H.M. King Abdullah to the Conference participants.

If possible, the Jordan speaker session should take place at a different hour from other country sessions, in order to avoid unnecessary competition for the same audience.

- **Make First Time Presentations (FTPs) to individual prospective investors** on a one-on-one basis. This will be arranged by a private consultant who has been hired to invite Conference attendees to the Jordan speaker session and to one-on-one meetings with members of the delegation.
- **Seek to secure First Time Site Visits (FTSVs).** This is the ULTIMATE goal of this effort and indeed a pre-requisite for any prospect to actually decide to establish an operation in Jordan.

3.0 Participation Strategy:

In order to achieve results and obtain the most for the investment, DZC's participation in the Conference should be guided by a very coherent and clear strategy. The proposed strategy has three very simple components:

1. **Venues:** there will be 4 venues available to DZC in this event:

a) Speaker Session slot assigned in the Conference's collateral agenda. It is important to make sure the assigned slot does not compete with other country presentations in order to avoid losing part of the audience. If at all possible, it would be desirable to start with short video with a salutation from King Abdullah to the audience of the Conference.

b) One-on-one meetings: with prospective investors. These are being arranged by an outside consultant who is taking the list of registered attendees and making calls to set up individual appointments.

It is important to define ahead of time what venue will be used to conduct these meetings: a rented conference room?, a hospitality suite?, the hotel coffee shop?, the hotel lounge? etc.

c) Booth: a booth would be a very good venue to attract potential interested prospects; distribute promotional material; show promotional videos and conduct individual meetings with investors.

d) Networking events: included in the Conference program such as lunches, cocktail mixers, etc. If worked properly, these events provide excellent opportunities to meet and interact with a potentially large number of prospective investors.

2. Delegation Composition: the make-up of the delegation is very important as it can and should be used to support and further Jordan's unified message. The Jordan delegation should be a public-private partnership of very professional, knowledgeable and organized businesspeople with common objectives and messages that will aggressively take full advantage of the opportunity offered by this event to build the image of their country and generate business leads.

This public-private delegation will ideally be composed by people from the following organizations:

a) Development Zones Commission: heading the delegation and representing the Government of Jordan and its promotional task force.

b) MDC: real estate developers and operators offering location solutions to potential investors.

c) Int@j: a private sector organization which represents the BPO sector in Jordan, offering the private sector point of view of the business opportunities in their sector.

d) Jordanian BPO companies: successful businesspeople who can underscore the fact that Jordan's objectives for BPO sector development are attainable.

e) SABEQ: represents the support of the US Government assisting the DZC to leapfrog to a higher level of effectiveness in their promotional ability.

3. Roles of delegation members: in order to be effective and project the right image, all the members of the Jordanian delegation must act in a synchronized manner as members of one single team. In order to do that, they all need to have clarity of the message that needs to be conveyed and individual roles that they will be expected to play during their participation in the event, as follows:

a) Development Zones Commission: the DZC's role is as follows:

Head the delegation and provide the necessary leadership and coordination.

Assign a DZC high official to present Jordan's Value Proposition message before the general audience in the country presentation assigned time slot.

Convey the message that business in Jordan is conducted on the basis of Public-Private Partnership model of which the delegation is a reflection.

Work to attain the overarching objective of securing First Time Site Visits to Jordan by potential investors.

- b) **Master Developers**: in this case the master developer will be MDC and it's role is the following:
- Present and offer specific location solutions for potential investors to establish operations in Jordan easily, quickly and at a competitive cost.
 - Assist the delegation in driving the unified message across.
 - Work to attain the objective of securing First Time Site Visits to Jordan by potential investors.
- c) **Int@j and Jordanian BPO companies**:
- Assist in driving Jordan's unified message across.
 - Present testimonials of success that indicate the feasibility of doing BPO business in Jordan.
- d) **BPO Companies**: Three vendors of services to 3rd parties and three captive operations including CISCO plus the newly announced HP subsidiary.
- Seek possible BPO contracting and/or joint venture opportunities.
 - Help secure First Time Site Visits.
- e) **SABEQ**: Provide advice and support to the whole delegation.

4.0 Value proposition message

The following 12 factors are the essential elements of the Value Proposition that Jordan has to offer. These 12 factors are what make it possible for Jordan to compete in the market for BPO investment and they are fully in synch with the key aspects that potential investors are looking for and actually require in order to consider a location as a good potential site for setting up their operations.

These 12 items are the basis for a) preparing the country presentation; b) preparing the investment promotion "sales pitch"; utilizing them as "talking points" with investors and moreover, they are the basic components of Jordan's BUSINESS CLIMATE which needs to be constantly improved in order to maintain the Kingdom's competitive stance.

1. Political and economic stability.
2. Qualified labor pool with proper language and communication skills.
3. Competitive cost structure.
 - Labor.
 - Communications.
 - Travel.
 - Other.
4. Excellent ICT infrastructure.
5. State-of-the-art legal and government incentive framework.
 - DZC laws and regulations.
 - Tax incentives.
6. Dedicated development zones with investment-ready buildings.
 - Dabouq.
 - Irbid.

7. Cultural and linguistic affinity with potential markets (India, GCC, MENA and arab-speaking EU. Touch on possible visa issues?)
8. Excellent infrastructure.
 - Transportation.
 - Energy.
9. Convenient location in the region (India; GCC; MENA; EU).
10. Success stories (existing BPO companies in Jordan).
 - Service vendors.
 - Captive companies.
11. Government support.
 - DZC One Stop Shop
12. Travel FactSheet.
 - Hotels
 - Airlines

5.0 Marketing support materials.

1. DZC brochure and web page (brochure available, web page in construction).
2. Country profile (see Appendix 1).
3. Fact Sheets: these are mostly one-page Executive Summaries supporting the elements of the Value Proposition. They are a great tool for promoters and delegation team members to better address the different issues and convey a single and clear message. Initial Fact Sheets are presented in Appendix 2 in the form of VERSION 1.1 to underscore the fact that they are dynamic documents that must be reviewed, corrected improved and updated constantly. New FactSheets can be added to the tool box as required.
4. MDC promotional material highlighting advantages of 2 development zones suitable for establishing BPO operations:
 - Dabouq.
 - Irbid.

6.0 Lead follow-up Strategy.

1. Responsibility allocation for follow up. DZC management must assign follow up responsibilities to an investment promotion officer to continue with the case until an investment is made.
2. Procedures for effective follow up. These are the classic procedures to ensure that the sales process moves forward relentlessly.
3. Support materials.
 - Courtesy follow up Email. A tactical way of “keeping the ball rolling” while it is still “hot”.
 - Pro-forma itinerary: a wonderful follow up tool allows the promoter to push the sales promotion process forward and allows the potential investor to visualize the value of such a Site Visit.

7.0 Appendixes.

1. FACT SHEETS.
2. FOLLOW UP PROCEDURES.
3. COURTESY FOLLOW UP EMAIL.
4. SAMPLE PRO-FORMA ITINERARY.

APPENDIX 1

FACT SHEETS

FactSheet 1: Politically and economically stable environment.

Endowed with a robust and liberal economy, Jordan boasts high levels of stability and security. Its large and talented human capital, its high quality of life and the ongoing economic liberalization process, has positioned Jordan as the ideal regional investment gateway.

Decades of sound macroeconomic management and sustained structural reforms -- including legislative, regulatory, and judicial reforms -- have positioned Jordan as a magnet for capital and a robust platform for business profitability.

Prudent fiscal and monetary policies have enabled and sustained healthy economic growth, while inflation has been kept at low levels. Furthermore, open and liberal market policies, have positioned Jordan as an ideal base for export-led growth to regional and international markets.

Jordan's unique trade and framework agreements offer investors access to a core market of 300 million consumers in the Arab world and a global market of over one billion consumers.

Jordan has an excellent and well-trained police force and military that are responsive and able to handle any contingency. The Kingdom consistently ranks among the safest and most corruption-free locations for business in the world in general and among Arab nations in particular.

As per the World Economic Forum Global Competitiveness Report 2009-2010, Jordan ranks as a very safe country as seen by both global and regional standards in comparison with 133 countries studied:

Reliability of Police Services	Business Costs of Crime & Violence	Business Costs of Terrorism	Prevention of Organized Crime
Jordan 17th worldwide	Jordan 17th worldwide	Jordan 56th worldwide	Jordan 8th worldwide
Egypt 54th Israel 93rd UK 33rd USA 21st India 52nd China 49 th	Egypt 53th Israel 30th UK 73rd USA 74th India 50th China 43 rd	Egypt 106th Israel 109th UK 113rd USA 121st India 117th China 66 th	Egypt 15th Israel 45th UK 54th USA 72nd India 63rd China 71 st

Jordan **enjoys a high level of transparency in government**, ranking 5th among Arab countries in the [2009 Corruption Perceptions Index](#) issued by Transparency International, after Qatar, UAE, Oman and Bahrain.

Jordan is committed to freedom of expression and choice. Measured by the Annual Freedom House survey, Jordan ranks fourth in the Arab World on major areas of freedom, such as political rights and civil liberties.

Sources:

Jordan Country Profile SABEQ 2010

www.jordaninvestment.com

www.weforum.org

www.transparency.org

www.freedomhouse.org

FactSheet 2: Qualified and Talented Workforce.

From executives to skilled laborers, we educate for the 21st century. Whether you are looking to outsource or locate labor in-country, Jordan's human capital will help your money work better for you.

Our training investments in the high-tech, manufacturing and service sectors add value to the economy, while labor costs remain the most competitive in the Middle East.

- Jordan is among the region's highest spenders on education, investing more than 20.4% of our GDP to enable a labor force tailored to meet the demands of the modern market.
- Jordan's literacy rate of 91% is among the highest in the Middle East.
- Over 200 thousand students attending our 25 universities and another 20,000 Jordanians are earning degrees abroad.
- Sixty (60) community colleges and 35 vocational centers graduating over 10,000 skilled technicians annually.
- 70% of the population age demographic is under the age of 30, denoting a youthful population.
- Jordan has long enjoyed a skilled labor pool for services and industry. The average wages in these sectors are on par with those of China and India.
- Jordan's world-class Labor Laws offer flexible employment regulations to all investors.
- Beginning in elementary school, Jordanian children learn English and Computer skills (in preparation for IT training at the secondary level).
- There are 5 "business incubators", where students receive guidance and assistance from the private sector.
- Jordan produces over 6,000 IT graduates every year.
- An efficient and productive workforce. We spend 4.2% of our GDP to guarantee the well being of our citizens; more than any other country in the region.
- The labor force is healthy as life expectancy and public health levels in Jordan are comparable to the industrialized nations with 70% of the population on medical insurance.
- Trends in International Mathematics and Science Study (TIMSS) 2007 Report ranked Jordanian students in first and second place in the Arab World in mathematics and science average scores respectively.
- The following table shows the annual number of Jordanian college graduates at both undergraduate and graduate levels.

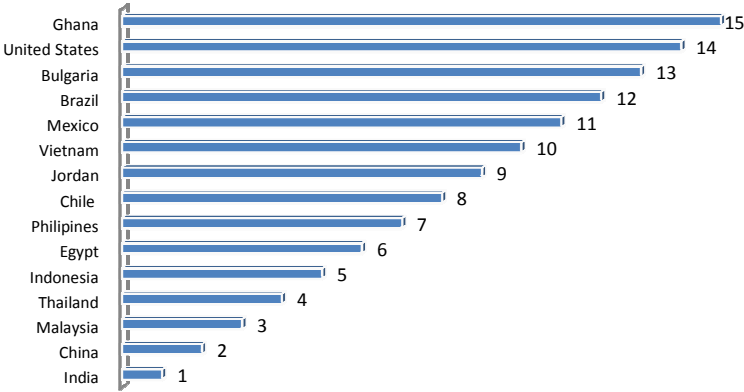
Total number of undergraduate students	2003/ 2004	2004/2005	2005/2006	2007/2008
Commercial and Business Administration	5,636	6,355	7,267	8,502
Medicine	266	278	369	511
Engineering	2,597	3,182	3,658	4,149
Architecture and Town Planning	125	88	178	303
Total number of graduate students	2003/ 2004	2004/2005	2005/2006	2007/2008
Commercial and Business Administration	243	393	383	681
Mathematics and Computer Science	116	218	523	453
Medicine	118	139	107	195
Engineering	173	155	221	196
Architectural Engineering	20	14	5	11
Source: Ministry of Higher Education and Scientific Research 2009				

Sources:

Jordan Country Profile SABEQ 2010, www.jordaninvestment.com, www.nces.ed.gov/timss

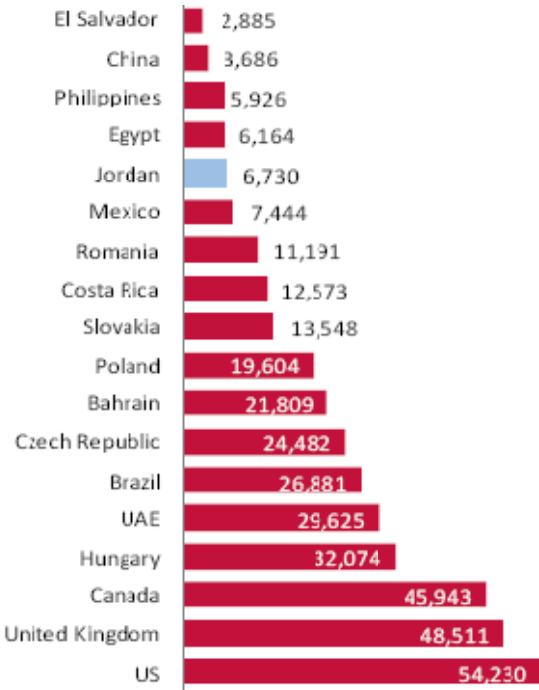
FactSheet 3: Competitive Cost Structure.

According to the 2009 Global Services Location Index, Jordan is one of the top ten destinations worldwide for providing outsourcing activities, including IT services and support, contact centers and back office support.



Source: A.T. Kearney Global Services Location Index - 2009

Jordan is very competitive with other countries in the Region in the main three Cost Categories:



ration fees.
ees.
ss Consultations.
permits.
rgs: residential, commercial
dustrial.
ehicles.
t:
s: electricity, water, fuel.
m: land lines, mobile lines,
et.
nce: vehicles, buildings,
al.
ting: advertising, web page
, etc.
management, technical,
istrative, production.

Comparative Average Annual Compensation for IT programmers in various countries.

Sources:
Jordan Country Profile SABEQ 2010;
BearingPoint Analysis of data from ILO LABORSTA Database;
www.jordaninvestment.com

FactSheet 4: Excellent ICT infrastructure.

Jordan's telecommunications infrastructure is modern, with a very competitive mobile and internet landscape. Jordan has one of the **most open telecommunications markets** in the Middle East which is overseen by an independent regulator.

The fixed-line market was liberalized on 1 January 2005 with the market open to full competition. Since 1996, internet penetration has increased every year.

According to the Networked Readiness Index 2006–2007 rankings (WEF Report), Jordan scored 3.74, which means 57th in the world and 5th place in comparison to Arab Countries.

The local Telecom Company, JITCO, is a consortium of French Telecom (88%) and the Jordan Arab Bank (12%).

Telephony service in Jordan has steadily improved over the past few years with the deployment of new digital switching equipment, microwave radio relay transmission and coaxial and fiber-optic cable networks. Impressive growth in mobile cellular usage has taken place at the time that a relative decline has affected land lines.

France Telecom, as 88% owner of JITCO has set up 3 subsidiary companies to provide mobile/cellular phone service (MobileCom); internet access (Wannado) and online services (e.dimension). Zain Jordan also provides leased line connectivity to businesses, including call center operators and provides an alternate link to global data networks through the KSA.

Currently there is only one link to the global internet backbone, named the Fiber Optic Link around the Globe (FLAG). This has been a bottleneck for the development of the BPO sector in the country. However, an agreement was recently signed by VTEL Jordan and Reliance Globalcom to establish a link to the FALCON undersea cable through Aqaba in early 2010, tripling the bandwidth connectivity to the global network. This will be the first "terabit" cable landing in Jordan, and will serve the fast growing demand for broadband connectivity and offer a much needed alternate communication gateway, providing diversity and redundancy and decisively supporting Jordan's positioning as a regional hub for foreign direct investment.

Sources:
Jordan Country Profile SABEQ 2010
www.jordaninvestment.com

FactSheet 5: Government Incentives.

The Government of Jordan has established various business-enabling laws and regulations which include strong investment incentives. The major aim is developing an effective and competitive regulatory framework to activate the role of the private sector, increase the volume of domestic investment and attract inward international investment in sectors of opportunity.

Through the Development Zones Law of 2008, Jordan provides potential BPO investors with access to a world-class, streamlined Business Environment, designed to compete with the best offerings in the region.

By virtue of these laws, there are currently two main options to establish a BPO operation in Jordan:

1. **Development Zones:** there are 2 development zones which offer an excellent environment for BPO companies to establish:
 - a. Dabouq Development Area
 - b. Irbid Development Area

Summary of Fiscal Incentives under the Development Zones Law of 2008:

- Corporate Income Tax: 5%
- Personal Income Tax: no exemption for foreign workers.
- Sales Taxes: 0%
- Custom Duties: 0%
- Social services and dividends tax: 0%
- Foreign ownership: 100%
- Foreign employment: unlimited, includes expedited immigration, transit and business visas and family residence visas.
- Streamlined registration and licensing procedures (pending the issuance of corresponding Regulations).
- All tax and fee related incentives and exemptions as set forth in the Free Zone Law or any other law applicable in Jordan.

2. **Free Zones:** Under the Free Zone Law any BPO company can establish within a designated Free Zone or as choose to be a single-enterprise free zone anywhere in the country. It could also establish under the Free Zone Law but inside the boundaries of a Development Zone. This would allow for obtaining the Free Zone incentives while at the same time benefiting from the excellent locations and ready-made buildings available in some of the existing development zones such as Irbid and Dabouq.

The Fiscal Incentives of the Free Zones Law are summarized as follows:

- Allows for Service Companies to establish under it.
- Corporate Income Tax: 0%
- Personal Income Tax: 0% for foreign workers.
- Sales Taxes: 0%
- Customs Duties: 0%
- Foreign ownership: 100%
- Foreign employment: up to 50% of the total.
- Repatriation of profits: 100%

Table 19: Comparison of Business Environments in Select Outsourcing Locations

	Jordan Development Areas	Jordan Free Zones*	Dubai	Egypt	Philippines	India	Canada
Corporate Tax Exemptions	Yes 0% until 2015	Yes 0% for all exports	Yes 0% for 50 years	Yes 0% for Five Years	Yes 4 to 6 years	Yes Until 2010	No Tax Breaks by Regional Gov'ts
Personal Income Tax Exemptions	No	Yes 0%	Yes 0%	No	No	No	No
Customs Duty Exemption	Yes 0% on all equipment to be used by registered companies	Yes 0% on all goods and equipment	Yes 0% on all equipment to be used by registered companies	Yes 5% on all equipment to be used by registered companies	Yes 0% on all equipment to be used by registered companies	Yes 0% on all imports necessary for operations	No
Foreign Employment	Yes Unlimited	Yes Limited to 50% of workforce	Yes	Yes Very Restricted	Yes	Yes	Yes
Restriction of BPO Services	No	No**	Yes	Yes	Yes	Yes	No
FDI	Yes 100% Foreign ownership	Yes 100% Foreign ownership	Yes 100% Foreign ownership	Yes 100% Foreign ownership	Yes 100% Foreign ownership (for branches only)	Yes 100% Foreign ownership	Yes 100% Foreign ownership

* Jordan Free Zones incentives apply only to exported services. It is not clear how, or even if, BPO firms could provide service to the domestic market under this framework.

**Professional activities that might serve as the basis for KPO or other BPO activities are subject to licensing by Jordanian authorities under Jordanian law (i.e., lawyers would need to be licensed by the Jordanian Bar, etc.)

Sources:

Market demand assessment for Outsourcing Sector-SABEQ

www.jordaninvestment.com

FactSheet 6: Dedicated development zones.

There are two Development Zones in Jordan which are suitable for establishing a BPO operation:

1. **Dabouq Development Zone:** Declared as a development zone on January 26, 2010, Dabouq is the main zone ready to be utilized by BPO companies wishing to establish in Jordan. Also known as King Hussein Business Center, Dabouq is a gated business park positioned in a prime location within the city of Amman, close to top office, commercial and residential areas. This modern office park complex boasts 116,000 m2 of high quality office space and support areas in high quality multi-story buildings ready for occupancy.
2. **Irbid Development Zone:** located near Jordan's premier technology university, IDZ is currently close to starting the construction of smart office buildings, specially designed to provide state-of-the-art shelter for BPO companies.

Aside from these, a BPO operation could be established in any of 5 State-owned or 4 privately-owned free zone parks operating in Jordan which cater service companies.

Finally, the Free Zones Law allows for the establishment of a BPO operation on a stand-alone basis in any area of the country, including the 3 Development Zones mentioned above.

Sources:

Market Demand Assessment for Outsourcing Sector-SABEQ

www.free-zones.gov.jo

FactSheet 7: Cultural and linguistic affinity.

As leading international BPO vendors continue to grow as global companies, they will seek to break into regional markets, but the increasingly global footprint of these firms means that they are seeking new locations from which to deliver services. Jordan is well positioned to host these companies as they serve the Arab regional market.

Although Jordan is ideally positioned to service all the Arab nations including the Gulf countries, the Levant region, the North African countries, and even the Arabic-speaking population of the European Union and the USA, there is no doubt that Jordan's closest geographical and cultural affinities will be found in the nearby states of the Gulf Cooperation Council (GCC).

The members of the GCC are the Kingdom of Saudi Arabia; United Arab Emirates; Kuwait; the Kingdom of Bahrain, the State of Qatar and the Sultanate of Oman. Jordan shares a time zone and considerable cultural "kinship" with its affluent neighbors and in the case of Saudi Arabia it even shares a border. Many of the network solutions that Jordan has put in place to provide redundancy to its sole broadband connection FLAG go through Saudi Arabia, adding to the physical advantages of the GCC countries as a near shore market for services delivered from Jordan.

The macroeconomic indicators are favorable for Jordanian workers. Educational enrollment per capita surpasses a number of regional competitors, and with services making up more than 86 percent of Jordan's economic output (compared with less than 50% in Egypt for example), Jordanians are clearly oriented towards a services economy. Jordanians are recognized to be more technology savvy, with higher fixed and mobile line penetration as well as internet usage penetration per capita than some of its most aggressive competitors.

Because Jordan's best and brightest often find employment in the Gulf countries, the Jordanian workers and professionals are also already a familiar sight in the principal markets of the Gulf where they enjoy an established reputation as hard-working and productive in the markets most likely to be attractive to BPO investors seeking to serve regional markets and Arabic-speaking populations in the European and even in the US markets.

Sources:

Market demand assessment for Outsourcing Sector-SABEQ

FactSheet 8: General Infrastructure.

Jordan is endowed with excellent infrastructure to serve and move people, goods and ideas.

1. Airports:

- a. Queen Alia International Airport, serving the city of Amman, was recently expanded to serve 9 million passengers with 55 direct destinations operated by Royal Jordanian Airlines and 700 other destinations served through airline alliances. QAIA also offers a modern air cargo terminal.
- b. King Hussein International Airport serving the port city of Aqaba managed and operated under a BOT arrangement by the National Air Services Company of Kuwait.
- c. Amman Civil Airport at Marka, serving mostly domestic and some international routes to nearby destinations.

2. Seaport:

Situated in the Gulf of Aqaba on the Red Sea, Aqaba is the only sea outlet in Jordan. Aqaba is a deep-water harbor which offers facilities for general cargo, containerized cargo and specialized cargo.

3. Railroad:

There is a new railway master plan to improve and increase the existing 620 km long rail network.

4. Roads:

Jordan has a well developed road network allowing quick access to all its territory.

5. Electric Energy:

Reliable and competitively priced, electricity in Jordan is generated by a single provider, The Jordanian Electric Power Company (JEPCO) which also distributes electric power for Amman, Zarqa, Salt and Madaba. While outages do occasionally occur, reliability is considered high. However, operations that cannot afford even minor power outages usually take measures to ensure 100% uninterrupted power supply without much cost or difficulty, much like it is done everywhere in the world.

Jordan's energy sector is growing and developing rapidly. Government direction is geared on reducing energy dependence by increasing the use of renewable energy sources and offsetting of efficiency in the energy demand. Various plans are in progress in that direction. The Government of Jordan is therefore actively seeking the development of sustainable renewable energy sources including the use of the country's uranium oil shale deposits, and solar and wind powers.

Jordan is committed to further integration with the petroleum economies of the region which holds a range of benefits, including more access and reduced costs for petroleum supplies.

Sources:
Market demand assessment for Outsourcing Sector-SABEQ
www.jordaninvestment.com

FactSheet 9: Strategic location in a Region with 1 billion consumers.

Jordan's strategic location at the convergence of three continents, Asia, Africa and Europe makes it the ideal position for a regional hub. Jordan's time zone is only one hour ahead than the EU time zone and one hour earlier than the Indian time zone.

Aside from the ideal geographical and time zone location, Jordan is connected to neighboring countries and global markets through modern and competitive transportation and communication networks.

The Middle East and North Africa (MENA) countries have a population of over 300 million consumers, 5% of the world's population. MENA's population growth of 3% p.a. allows forecasting that the consumer market will double in the next 18 years. MENA accounts for almost half of Jordanian exports which give Jordan an ideal position to serve as a focal point for trade and investment within the MENA region, particularly for the GCC markets.

Jordan's location allows BPO companies to easily diversify and expand into these increasingly affluent markets which altogether have an area of 13.6 million square kilometers (almost equal to the European Union and one and one half larger than the USA or China).

Capitalizing on its strategic position, Jordan adopted a policy of building global partnerships and institutionalizing relationships that would enhance free trade and global market access. As a result of these open and liberal policies, the Kingdom today offers investors access to over one billion consumers in strategic regional and international markets.

Jordan signed an Association Agreement with the European Union, gained membership to the World Trade Organization in record time, and was the first Arab country to sign a free trade agreement with the United States. Moreover, and as a signatory to the Greater Arab Free Trade Agreement, Jordan has preferential access to most Arab markets including GCC countries. Jordan also signed the Qualifying Industrial Zones Agreement (QIZs), with the U.S. and Israel, which allow products developed in special designated areas access to the U.S. market, free of quotas and tariffs. The Government of Jordan is currently negotiating free trade agreements with Canada; Pakistan; Turkey and The Common Market of Eastern and Southern Africa.

Sources:
Jordan Country Profile-SABEQ 2010.
www.jordaninvestment.com

FactSheet 10: Success stories in BPO.

There are 5 existing BPO operations in Jordan. A sixth one has just been announced and will be a wholly owned subsidiary of Hewlett Packard.

Of these, 2 are “captive” operations, as follows:

1. **Estarta:** dedicated to provide high-complexity services to Microsoft and Cisco Systems, Estarta is part of the Global Technical Assistance Center program of Cisco Systems, which extends to 5 other countries in order to ensure “follow the sun” technical support for Cisco. Estarta is a certified support center for Arabic language speakers using Microsoft technologies. The company has 75 employees dedicated to Cisco Systems and 125 dedicated to provide Microsoft technical assistance.

Estarta is a successful company by any standard, but it is also a demonstration of how Jordanians can rise quickly to meet the challenge of serving the demands of the global market given the right opportunity.

2. **Hewlett Packard:** the recently announced HP operation will be a Regional Competency Center to service the wider Middle East, Mediterranean and Africa (MEMA) region. As a first step it will provide technology services to Jordan and the MEMA region, eventually evolving into one of HP’s global services delivery centers in the World.

The other 4 operations provide services to third parties, as follows:

1. **Aspire:** founded in 2000 and with 173 employees, this company provides medium to high-complexity services such as application development and testing as well as help desk functions for 3 different US clients. One of the largest clients is Weight Watchers, Inc. Aspire recently expanded into front-office contact services with 25 seats.
2. **Crystell Call:** this company was the first contact center that was established in Jordan, with over 300 employees (100 seats). Duly certified by Customer Operations Performance Center (COPC), Crystell provides a variety of medium-complexity services to a much diversified customer base from Jordan, the GCC countries, USA and Canada, with the latter 2 representing 60% of their activity.
3. **Extensya:** established in early 2009, Extensya is already servicing 5 low to medium-complexity client contracts including some regional and global leaders in their fields such as Microsoft, Fly Dubai and others. Extensya’s services include telesales, data collection and customer services. Most of their work is directed towards the Gulf region and they have 50 employees.
4. **E3Mar Outsourcing:** this company has a different business model as they provide a full range of “virtual office” services for small and medium sized companies. Services include translation, executive assistants, business function and operations systems, HR and hiring, facilities management and business consulting. E3Mar allows foreign investors to “outsource” many of the major functions required for a startup. They even provide fully furnished and equipped office space with phones, security and secretarial support.

Sources: Market demand assessment for Outsourcing Sector-SABEQ

FactSheet 11: Government Support.

The Development Zones Law of 2008 was enacted with the aim of enhancing the economic capacity in the Kingdom, attracting the investments and creating an advanced investment environment for Economic Activities. Article 6 of the law creates the Development Zone Commission (DZC) as the administrative body to manage the development zones, reporting directly to the Prime Minister.

Under this world-class law, the DZC has the mandate to increase Foreign Direct Investment (FDI) and to establish a One Stop Shop to administer, supervise and centrally approve all investment related matters, expediting all governmental services quickly and efficiently in one location while also providing investment incentives and tax and customs exemptions.

The DZC vision is to facilitate the creation of economic growth within certain zones and ensure a business-friendly and investment attracting environment.

















The DZC One Stop Shop service aims to quickly and efficiently streamline all the set up requirements in one single place:

- Licensing: including registration of companies and permits.
- Labor licenses: including visas, residency and employment related procedures and approvals.
- Fees, taxes and customs collections.
- Ongoing procedures necessary for operations.

Aside from the above, the DZC One Stop Shop provides investors and stakeholders with all necessary information about business opportunities in the development zones in Jordan, together with all the services and procedures to facilitate all matters pertaining to the investment.

Sources:
Development Zones Law of 2008.
DZC Presentation Brochure.

FactSheet 12: Location, Travel and Time Zone:

Location and Time Zone:	The Hashemite Kingdom of Jordan is located in Western Asia spanning the southern part of the Syrian Desert down to the Gulf of Aqaba . Jordan shares borders with Syria to the north, Iraq to the northeast, Saudi Arabia to the east and south, the Gulf of Aqaba to the southwest, and the Palestinian territory of the West Bank and Israel to the west. It shares control of the Dead Sea with Israel . Much of Jordan is covered by the Arabian Desert . However, the north-western part of Jordan is part of the Ancient Fertile Crescent Valley. The capital city is Amman . Jordan Time Zone is GMT +2 (+3 in summer time).																			
Airlines, routes and costs: (prices may vary according to flying class, season, etc).	• Flight Duration from Amman to New York City 12 hours																			
	 American Airlines USD1,400.00	 Royal Jordanian USD1,514.00		 US Airways USD2,525.00																
	• Flight Duration from Amman to London 5 hours																			
	 Royal Jordanian USD756	 British Airways USD1,168.60	 Lufthansa USD2,000.00	 United Airlines USD2,800.00																
	• Flight Duration from Amman to Tokio 19 hours																			
	 Emirates USD1,772.00	 Royal Jordanian USD1,772.00	 Egyptair USD2,066.00	 Qatar Airways USD2,145.00																
	• Flight Duration from Amman to Mumbai 8 hours (includes intermediate stop).																			
	 Etihad Airways USD606.00	 Qatar Airways USD643.00	 Gulf Air USD652.0	 Kuwait Airways USD1,323.00	 Qantas USD1,521.00															
Hotels and costs: (prices may vary according to season, etc.)	<table><tr><td>- Kempinski Hotel Amman</td><td>USD156.00</td><td>- Sheraton Amman</td></tr><tr><td>- Le Meridian Amman</td><td>USD157.00</td><td>- Intercontinental Amman</td></tr><tr><td>- Holiday Inn Amman</td><td>USD120.00</td><td>- Grand Hyatt Amman</td></tr><tr><td>- Amman Marriott Hotel</td><td>USD211.00</td><td>- Le Royal Hotel Amman</td></tr><tr><td>- Four Seasons Amman</td><td>USD200.00</td><td></td></tr></table>					- Kempinski Hotel Amman	USD156.00	- Sheraton Amman	- Le Meridian Amman	USD157.00	- Intercontinental Amman	- Holiday Inn Amman	USD120.00	- Grand Hyatt Amman	- Amman Marriott Hotel	USD211.00	- Le Royal Hotel Amman	- Four Seasons Amman	USD200.00	
- Kempinski Hotel Amman	USD156.00	- Sheraton Amman																		
- Le Meridian Amman	USD157.00	- Intercontinental Amman																		
- Holiday Inn Amman	USD120.00	- Grand Hyatt Amman																		
- Amman Marriott Hotel	USD211.00	- Le Royal Hotel Amman																		
- Four Seasons Amman	USD200.00																			
Visa requirements: (all others can obtain visa at airport at the time of entry).	Countries requiring prior visa clearance: Africa: Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Central African Republic , Chad, Congo, Cote d'Ivoire (Ivory Coast), Criteria, Djibouti, Equatorial Ghana, Ethiopia, Gambia, Ghana, Guinea, Guinea -Bissau, Kenya, Liberia, Madagascar, Mali, Mauritania, Mozambique, Niger, Nigeria, Senegal, Sierra Leona, Somalia, Sudan, Tambia, Tanzania, Togo, Uganda, Zaire, Zambia. Asia: Afghanistan, Cambodia, Iran, Laos, Mongolia, Nepal, Pakistan, Papua New Guinea, Philippines, Sri Lanka, Thailand, Uzbekistan, Vietnam. Europe: Albania, Bosnia &Herzegovina, Macedonia, Moldavia. South America: Belice, Colombia, Cuba.																			

Sources:
www.orbitz.com
 Hotel web pages.
 Ministry of Exterior Affairs.

APPENDIX 2

FOLLOW UP PROCEDURES

FOLLOW UP Procedures

This document outlines the basic procedures which should be utilized by the DZC to follow up on a prospect to which a First Time Presentation (FTP) has been made. The objective is to secure the First Time Site Visit (FTSV) to Jordan which it is clearly a pre-requisite for anyone to actually decide to do business in the Kingdom.

All site visits are full of learning experiences and will provide both positive and negative information. It is important that the "lessons learned" be discussed with the Investor Services staff so that the team as a whole can gain from the individual experiences of the staff members.

The process is divided in eight different steps which are presented below:

1. Sending a courtesy follow up email

Within 3 days after delivering the First Time Presentation to the prospective investor in his offices or in an event venue such as Nasscom, the Investment Promoter should send a courtesy email thanking the investor for the time that was allocated to the presentation and underscoring the expectation that the next step will be a First Time Site Visit to Jordan.

2. Defining the Site Visit

The first step is to define the OBJECTIVE of the visit; this has to be done by the Investment Promoter during the FTP. A typical first time site visit objective is "to obtain first-hand information of what the country has to offer and to talk with local business people about their experience in a specific field".

The DZC Investment Promoter generating the site visit is responsible for defining the objective together with the potential investor prior to the visit. Once the objective has been clearly defined, the process of design of the actual site visit can begin. Each specific activity within a site visit should help attain the overall objective of the site visit.

3. Ensuring effective communication with the Potential Investor

The DZC Investment Promoter will be responsible for defining and securing the site visit. Once that is done, the DZC will assign an Investment Officer to actually organize and manage the site visit. Communications with the investor should all be in writing (mostly by e-mail), although a phone call may be useful in some cases. The DZC Investment Officer organizing the site visit should make sure the following information is on file:

- Company name; parent company name, etc.
- Investor contact data.
- Persons visiting, names and titles.
- Site visit objective.
- Activity or business proposal to be explored.
- Planned travel dates (and specific flights).
- Any other specific information provided by the company rep regarding the site visit (or specific requests).

In addition, the DZC Investment Officer should research company information using local resource materials, data base information, as well as sources such as D&B or the company's own web site.

The DZC Investment Officer managing the site visit will be in a privileged position to push the deal forward and in many cases he or she will be able to actually "close the deal". The final positive decision regarding an investment is usually made in the company's home office; however, a negative decision can occur while on a site visit.

The site visit (First Time or Follow Up) is part of the overall investment promotion process, and the more the DZC knows about the potential investor and about the individuals on the site visit, the better the chances of converting a site visit into an actual investment.

4. Organizing the Site Visit.

A site visit schedule should be kept within the DZC Investor Services department including all site visits on the calendar along with the name of the Investment Officer that will be in charge of each site visit. This calendar should be kept updated at all times in order to anticipate and better plan for busy periods.

After updating the calendar, the Investment Officer in charge of the site visit can begin structuring the visit based on the information that has been provided. This involves choosing relevant local companies and other visits and putting them in the form of a Pro-Forma site visit schedule that can be sent to the investor for review. The site visit should also schedule a "briefing" at the beginning of the visit and "debriefing" at the end of the visit with the Commissioner for Investor Services as well as a social visit (dinner or lunch) with the Commissioner and/or other key DZC personnel.

Additional information to be included in the Pro-Forma site visit schedule if and when available:

- Name of Investment Officer in charge of site visit that will meet the investor at the airport upon arrival to the country.
- Contact information (telephone/fax/e-mail of the Investment Officer).
- Date of arrival, airline, flight number, etc.
- Date of departure, airline, flight number, etc.
- Name of Prospective Company.
- Names and Titles of individuals visiting.
- Hotel where they hold reservations.
- Program of meetings and appointments.

When the contents of this preliminary itinerary are completed it should be dated and clearly marked "Pro-Forma", and then the Investment Promoter should send it to the potential investor for discussion or comments.

When scheduling a site visit, the DZC Investment Officer should keep in mind that time is the most valuable asset for serious investors. While investors may complain of long days and may request time off in a schedule, the majority will want to achieve the most out of the site visit, even if it means working long hours. At the same time the itinerary must allow enough time for each meeting as well as for transportation from one meeting to the next.

i. Discussing the Pro-Forma Site Visit Itinerary with the Investor and generating the Final Site Visit Itinerary

Once the investor has had a chance to react to the Pro-Forma itinerary that has been sent, a Final itinerary can be prepared and confirmed. The final itinerary should be reviewed by the head of Investment Promotion, marked final, and dated. The Investment Promoter should then send it to the investor with a copy to the Commissioner for Investor Services so that he is aware of the site visit.

ii. Preparing for the actual Site Visit

Several days before the actual site visit the DZC Investment Officer in charge of the site visit must:

- Confirm hotel reservations on behalf of the investor.
- Confirm that the visitor has a valid visa.
- Confirm use of a vehicle for the site visit.
- Re confirm all scheduled visits.
- Confirm travel dates and airline information with the investor.
- Confirm the briefing and debriefing meetings with the Commissioner for Investor Services.
- Request funds for the site visit if needed.

A standard control sheet with the above information should be developed and attached to the Investment Officer copy of the site visit so as to foresee and take care of "small details" which can ruin an otherwise successful site visit.

iii. **Conducting the actual Site Visit.**

The first item in the agenda should be a briefing with the DZC Commissioner for Investor Services in order to welcome the investor, discuss the site visit program, the site visit objectives and make any last minute changes, if necessary. If changes are made to the site visit, a new document must be printed and marked "FINAL" and dated.

The site visit must be managed with punctuality. The Investment Officer should try to build a relationship with the investor along the way, making the investor "feel at home" in Jordan. At the same time, the Investment Officer should anticipate the investor's needs, learn what he likes and dislikes about Jordan, his views on other competing locations etc. This type of information will be very useful in order to eventually "close the deal".

During the site visit, it might be good to schedule an informal session for the investor with government officials. This can be a lunch, dinner, or even coffee after hours. During this time the investor will probably be more relaxed, and many times it is possible to gather additional information about himself or the company that might not be revealed otherwise.

If anything goes badly during the site visit, the Investment Officer should notify it at once so that the Commissioner can then intervene if necessary to correct the problem, or at least demonstrate concern and the commitment on the part of the program to always help the investor. The most common complaint is that the site visit may not be providing the investor with the information he expected or the objectives are not being achieved.

The last visit in any itinerary should be a debriefing with the DZC Commissioner for Investor Services. Prior to this debriefing, the Commissioner should be provided with information on how the visit went to help him prepare for it. During the debriefing the Commissioner should seek to find out what the investor liked and disliked about the country in general and the site visit specifically.

Within 48 hours of the end of the site visit, the Investment Officer must prepare a report. A copy of this report should go to the specific Investor's File. The report should provide a maximum 2 page summary of the results of the site visit including any information that the potential investor requested and could not be provided during the visit. This will be a key element for the effectiveness of further follow up activities. The Commissioner for Investor Services should also add any additional comments to the report based on the briefing and debriefing with the investor.

iv. **Next steps towards "closing".**

The site visit report should include a recommendation on next steps to follow-up and continue with the process. Specific instructions should be detailed so that there will be on going follow-up until a decision is made to invest in Jordan or not.

APPENDIX 3

COURTESY FOLLOW UP EMAIL

Courtesy follow up email

From: Sameer I. Asfour-Commissioner for Investor Services
To: Mr. Joseph A. Investor.
Ref: Our meeting last week.

Dear Mr. Investor:

It was certainly a pleasure having met you last week during the NASSCOM Leadership Forum.

I wish to thank you for the time you allowed us to present the advantages and value of Jordan as a platform for accessing the Arabic-speaking countries in the MEMA region, as well as the services that the DZC can provide to you in name of the Government of Jordan.

I am convinced that Jordan is the right site for establishing your Business Process operation and I would like to emphasize the importance of making a 2 or 3 day visit to Jordan in order to personally assess and evaluate those advantages and how they might fit your requirements.

In a few days we will get back to you with a proposed itinerary that will allow you to fully understand what you could expect to accomplish during a short but productive visit to Jordan that we at DZC are in a position to organize for you.

Again I thank you for your kind attention and remain,

Respectfully yours,

Sameer I. Asfour
Commissioner for Investor Services
Development Zones Commission

APPENDIX 4

SAMPLE PRO-FORMA ITINERARY

Sample Pro-Forma Itinerary

PRO-FORMA ITINERARY FOR VISIT TO JORDAN

DZC Investment Officer: Eng. Faisal A. Majali.

Contact information: Office: 962-6-580-2405; Fax: 962-6-580-2415; Mobile: 962-79-592-9889. Email: fmajali@dzc.jo

Site visit dates: February 27 to March 2, 2010

Visitors: Mr. Joseph A. Investor, CEO and Mr. _____, CIO, Outsoursa Corporation.

PROPOSED PROGRAM:

Saturday, February 27

2:00 PM Depart Mumbai on Royal Jordanian 123 from Mumbai (*DZC will help you plan the most efficient route and obtain the best airfare*).

6:00 PM Arrive in Amman. Promotion Officer from DZC will pick up at Queen Alia International Airport and provide transportation to your hotel (*DZC will help you obtain a special room rate in the hotel of your choice*).

Sunday, February 28

8:30 AM: Investment Officer from DZC will pick you up at Hotel and transport you to DZC's headquarters.

9:00 AM: **Development Zones Commission (DZC)**. H.E. Mr. Sameer I. Asfour, Commissioner for Investment Services. Presentation, Questions and Answers, review itinerary, other aspects as required.

11:00 AM: **Int@j** (www.intaj.net). Mr. _____, CEO. Int@j is the Jordanian association of IT and BPO companies in Jordan. Questions and Answers on doing BPO Business in Jordan.

12:30 PM: Lunch

3:00 PM: **Estarta** (www.estimateasolutions.com) Mr. _____, Managing Director and Mr. Zeid Shubailat, Country Manager Microsoft. Provider of BPO services to Cisco and Microsoft with 200 employees.

4:30 PM: **Ministry of Communications and Information Technology** (www.moict.gov.jo). H.E. Mr. _____, Minister. Discuss the advantages that the Government of Jordan offers to companies establishing in the BPO sector.

6:00 PM: Return to Hotel

7:30 PM: **Extensya**. Dinner with Mr. _____, General Manager. BPO service provider with 50 employees offering services to several multinational companies including Microsoft.

Monday, March 1

- 8:30 AM: Investment Officer from DZC will pick you up at Hotel.
- 9:00 AM: **Aspire.** Mr. Kaushal Shah, Managing Director. BPO medium to high complexity service provider with 173 agents mostly serving US customers.
- 11:00 AM: **Crystel Call.** Mr. _____, Deputy General Manager. BPO service provider to multiple local and international customers, the largest contact center operation in Jordan with 300 employees.
- 1:00 PM: Quick lunch
- 2:00 PM: **E3Mar Outsourcing.** Mr. _____, General Manager. BPO service provider offering full menu of “virtual office” services for small and medium companies.
- 4:00 PM: **Halawani, Samman, Abu Hammour & Gonzalez.** Attorneys at Law. Discuss legal and labor aspects of doing business in Jordan.
- 6:00 PM: Return to Hotel.

Tuesday, March 2

- 8:30 AM: **Hewlett Packard.** Breakfast with Mr. Francesco Serafini, CEO. Regional Excellence Center providing services to the local and near-shore markets.
- 10:30 AM: **Talal Abu-Ghazaleh & Co.** Mr. Mustafa Nasereddin, Executive Director. Certified Public Accountants. Discuss accounting, fiscal and corporate set up requirements.
- 12:00 PM: **Dabouq Development Zone.** Mr. _____, General Manager. Standard Office Buildings ready for occupancy under DZC regime.
- 1:00 PM: Quick lunch.
- 2:00 PM: **Development Zones Commission.** H.E. Mr. Sameer I. Asfour, Commissioner for Investor Services. Debriefing session. Itinerary evaluation. Next steps.
- 4:00 PM: Return to Hotel.
- 8:00 PM: Depart Amman on Royal Jordanian 321 to Mumbai.

USAID Jordan Economic Development Program (SABEQ)
Deloitte Consulting LLP
Salem Center, Sequleyah Street, Al-Rabiyeh
Amman, 11194 Jordan
Phone: + 962-6 550-3050
Web address: <http://www.SABEQ-Jordan.org>