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BPO SECTOR MARKETING AND INVESTMENT PROMOTION PLAN

A PLAN TO GUIDE IMPLEMENTATION AND BUILD CAPACITY
FOR INVESTMENT PROMOTION EFFORTS IN JORDAN

20 October, 2009

This publication was produced for review by the United States Agency for International Development. It was prepared by Dennis Hall with inputs from Jose Ceron.

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FOR INVESTMENT PROMOTION EFFORTS IN JORDAN

USAID JORDAN ECONOMIC DEVELOPMENT PROGRAM

CONTRACT NUMBER: 278-C-00-06-00332-00

DELOITTE CONSULTING LLP

USAID/ECONOMIC GROWTH OFFICE

20 OCTOBER, 2009

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WORKPLAN DELIVERABLE: 2.14.02.08.38.05

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ACRONYMS

BPO	Business Process Outsourcing
DZC	Development Zones Commission
EDS	Electronic Data Systems (US-based company)
FAO	Finance and Accounting Outsourcing
FZC	Free Zones Corporation
HRO	Human Resources Outsourcing
ICT	Information and Communications Technology
IT	Information Technology
ITES	Information Technology-Enabled Services
ITO	Information Technology Outsourcing
JIB	Jordan Investment Board
KPO	Knowledge Process Outsourcing
LPO	Legal Process Outsourcing
MDC	Mafrag Development Corporation
MNC	Multi-national Corporation
MoICT	Ministry of ICT (Jordan)
NASSCOM	National Association of Software and Service Companies (India)
R&D	Research and Development
RIM	Remote Infrastructure Management
TCS	Tata Consultancy Services (India-based company)
VoIP	Voice Over Internet Protocol (telephony)

1 INTRODUCTION

Starting from its current, relatively modest base of front-office service providers, Jordan's BPO industry has the potential to be a significant driver of economic growth, foreign direct investment and thousands of quality jobs for Jordanians. Jordanian stakeholders must focus on developing clear competitive differentiators with respect to other regional players, both by focusing on clear market niches and positioning Jordan as a credible option in the market.

1.1 PURPOSE AND OBJECTIVES

Drawing directly on the results of the *BPO Gap Analysis & Sector Development Strategy* (BPO Sector Strategy) produced in April 2009 by the USAID Jordan Economic Development Program (SABEQ),¹ this document is designed with two distinct purposes in mind. The first of these is that of a traditional marketing and investment promotion plan: to guide investment promotion and regional marketing efforts to attract BPO investment into Jordan. Moving beyond the strategic thinking that has so been the focus of efforts, this document is meant to be a clear, actionable plan to be implemented by the DZC in close cooperation with other stakeholders. Specifically, this Plan:

- Clearly articulates Jordan's **value proposition** for BPO investors, which should underlie all messaging and communications to prospective investors
- Delineates the **roles** to be undertaken by key institutions and government agencies
- Provides DZC stakeholders with a set of **actions and activities** to guide proactive marketing and promotion efforts, including:
 - Specific market segments near-shore markets to be targeted over the next three years
 - Profiles of vertical target segments, including leading companies by target markets, with contact information of key decision makers
 - Regional and international events and trade shows to support marketing efforts
 - Leading trade publications in target market segments for image-building advertising
- Presents, by target market and program total, indicative **budgets** required to execute the marketing plan, including indicative costs to advertise in trade publications, participate in industry events, join key industry groups, and travel in support of direct promotion efforts
- Identifies key performance indicators (KPI) to support ongoing **management by objectives** (MBO) in the implementation of marketing efforts

The second purpose of this document is to serve as a pilot exercise to build capacity in the DZC and other relevant stakeholders to design, plan and implement marketing strategies for other promising sectors, including manufacturing and services. In addition to the marketing plan, which itself serves as a mechanism for DZC functionaries and staff to "learn by doing," this document also includes content designed as a direct learning aid.

Two companion volumes to this Marketing Strategy, an *Investment Promotion Country Profile* and a *BPO Sector Profile* will provide content and guidance to support the development of promotional materials and marketing collateral to support its implementation.

¹ This document assumes the conclusions and adopts the near-term strategies outlined in the *BPO Sector Strategy*.

1.2 HOW THIS DOCUMENT IS ORGANIZED

Following this brief introduction, **Target Markets and Segments** clearly articulates Jordan's value proposition to investors and provides an overview of the rationale for the selection of India and GCC countries as the principal target markets of this three year plan. This section also provides an overview of the vertical market segments that will be the focus of marketing activities in these target markets.

Section 3 presents a detailed **Marketing Plan**, which includes an overview of the Investment Promotion Goals that should form the basis of *Manage by Objectives* (MBO) indicators for the marketing team. This section also provides an overview of the types of marketing activities to be undertaken, including broad image building, targeted investment promotion and follow-on and support activities.

Learn by Doing Boxes, included throughout the document, provide content aimed at building the capacity of the DZC and other counterpart institutions' marketing teams.

Learn by Doing 1: Introduction

As discussed under *Purpose and Objectives* above, this plan includes content designed as a direct learning aid for DZC functionaries and staff and other investment promotion stakeholders. This material is presented throughout the document in these *Learn by Doing* boxes, which provide "behind the scenes" content to supplement the actions and activities described in the main text of the document. Moving beyond simply advising stakeholders *what* to do, these boxes build a better understanding of the marketing and investment promotion process by describing *how* and *why* stakeholders should take the steps outlined in the main content of the plan.

The content in these *Learn by Doing* boxes draws heavily on a number of existing sources designed to assist investment promotion intermediaries in developing economies to design and implement campaigns. Most prominent among these is the *Investment Promotion Toolkit* published by the World Bank's Multilateral Investment Guarantee Agency (MIGA).

2 TARGET MARKETS AND SEGMENTS

Drawing on the conclusions and strategic recommendations of the *BPO Sector Strategy*, this section focuses on the target markets toward which Jordan's marketing efforts will be directed over the period covered by this marketing plan. Underlying the selection of target markets and the strategy and messaging that will be used to attract investors in them is Jordan's *value proposition*.

2.1 JORDAN'S VALUE PROPOSITION TO BPO INVESTORS

As the global outsourcing industry moves beyond mere cost savings as the sole driver of investment decisions,² industry studies have demonstrated that the *quality* of a country's business environment, its human resources, and infrastructure are the keys to long-term competitiveness as a destination for BPO investors. A central message of marketing efforts should be to highlight how Jordan meets or exceeds investors' needs in these key areas. This is Jordan's value proposition to BPO investors. Specifically:

- Jordan has a highly educated, high quality **workforce** with a reputation for excellence in the region. From neutral Arabic and English language, to experience in key vertical industries, Jordan's human resources offer the skills vendors and end users need at highly competitive cost.
- Through the Development Areas Law, Jordan provides investors with access to a world class, streamlined **business environment** designed to compete with the best offerings in the region.
- From countrywide, redundant access to the global internet backbone to dedicated Development Areas for IT enabled service providers, Jordan's **infrastructure** meets the "plug-and-play" IT and physical requirements of demanding BPO investors.

Learn by Doing 2: Language and Tone in Marketing

It is important for DZC's marketing team to recognize and understand the difference between the language and tone of a strategy document and that of a marketing campaign.

A strategy is directed at an internal audience, and it should ensure that decision makers understand both the **challenges** they must address to advance the sector. A marketing campaign, on the other hand, is directed at an external audience, and it should focus exclusively on the **strengths** of Jordan's offering. Where the *BPO Sector Strategy* also highlights shortcomings to be addressed in Jordan's business environment, human resources and infrastructure offerings, the materials aimed at prospective investors should focus on the ways Jordan's offering *can and will meet* their needs.

Of course care should be taken to avoid making false claims or exaggerating, but leaders of the marketing team should also take care that advertisements, marketing collateral and discussions with prospective investors stay on message and consistently put Jordan's best face forward in its communications with prospective investors.

2.2 TARGET MARKETS

The *BPO Sector Strategy* examines both market forces, including regional and international demand and investment trends, and Jordan's existing capacities to identify market segments Jordan is best positioned to pursue. Table 1 below summarizes how the strategic findings of

² Notwithstanding the global economic downturn sparked by a financial crisis in the US in late 2007.

that report lead to the selection of the target markets for promotion efforts over the period covered by this marketing plan.

Table 1: How Jordan's Market Challenges and Opportunities Shape the Selection of Target Markets

Challenge	Opportunity	Strategic Implication
Although the MENA region remains very low on the list of locations companies in top global markets will consider for their outsourcing needs...	...the explosive growth that characterized the early days of the BPO industry in those markets is beginning to appear in the Middle East, and particularly GCC markets...	... so Jordan should focus marketing efforts on: <ul style="list-style-type: none"> ▪ Attracting industry end-users ▪ In GCC markets.
The global shift toward near-shoring in outsourcing decisions does not favor Jordan's prospects for attracting a critical mass of companies from the US or EU...	...but Jordan is very well positioned to take advantage of the same trend as outsourcing surges in the Middle East, and particularly the GCC markets...	
The growing importance of in-market sales in leading global markets will put Jordanian firms at a disadvantage to global vendors in the US and European markets...	...yet Jordanian vendors are very well positioned to deliver client-centric service and sales in near-shore markets in GCC countries.	
As leading international vendors continue to grow as global companies, they will present tougher competition for Jordanian vendors as they 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 regional markets...	...so Jordan should focus on: <ul style="list-style-type: none"> ▪ attracting leading international vendors ▪ In India.

As Table 1 indicates, the challenges Jordan faces and the opportunities they represent lead to two distinct market strategies:

- Marketing efforts in **GCC countries** will be directed primarily at *end-users* of BPO services, including companies in a variety of industry sectors (see Target Market Segments on page 6 below).
- Efforts in **India** will be designed to attract leading *international BPO vendors* to set up service centers to address the GCC, broader MENA and, in the longer term, leading international markets.

Because efforts in each of these distinct areas will be aimed at attracting different types of investors, these geographic distinctions also serve as an organizing principal for the marketing plan.

Learn by Doing 3: Strategy as Organizing Principal

Having an organizing principal for a marketing plan is more than a way to order the table of contents. The organization of a marketing plan should be based on the same **strategic reasoning** and principals that will guide its implementation. In this case, there is a clear distinction between target audiences—end-users vs. vendors—that happens to align with two distinct geographic areas—India vs. the near-shore GCC countries. Jordan’s cultural and linguistic affinities with the GCC countries plays a role in formulating the *strategy* to address these markets.

In any case, it is *strategy*, not geography, that should be the driving force and organizing principal behind a marketing plan and the efforts required to implement it.

2.2.1 INDIA

India’s leading BPO vendors are actively scouting the GCC region to establish service centers to address the GCC and broader MENA markets. Considering the region an immediate hedge against slowdowns in US and EU markets, they also seek longer term investment to meet growing demand. Because these firms are unlikely to invest in multiple locations in the region, instead seeking out economies of scale, the immediate market situation represents a critical opportunity with a relatively short “shelf life.”

India’s vendors also represent the vanguard of the industry, and where they lead the rest of the world has tended to follow. This should also add a sense of urgency and priority to India, as the presence of these vendors would have a catalyzing effect on the DZC’s capacity to attract further investment in the sector. Specifically, India’s vendors:

- Bring unparalleled expertise, which will build the capacity of Jordanian firms and human resources.
- Would add significant credibility to Jordan’s investment promotion efforts and underscore messaging about its value proposition, boosting Jordan’s claim as a regional BPO hub.
- Are aggressively expanding global networks to serve as delivery platforms on an international scale, opening a window of opportunity to use India BPO vendors as a launch pad into international markets.

By addressing these vendors now, Jordan will begin to gain access to these global delivery networks, establishing itself in the international marketplace.

2.2.2 NEAR-SHORE MARKETS

The near-shore markets are essentially the GCC countries. Given the strategy of addressing potential end-users of BPO services in a handful of vertical market segments (see Target Market Segments in section 2.3 below), marketing efforts in these countries will be directed at a more diffuse audience. This will place different demands on messaging, staff and resources than will efforts in India.

SAUDI ARABIA

With control over fully a fifth of the world’s proven oil reserves, it is perhaps no surprise that Saudi Arabia is the largest of the GCC economies. The Kingdom also represents the largest regional market for IT expenditures, and spending on all IT services there exceeded USD

890 million in 2007, an 11 percent jump from 2006 figures. Outsourcing is still the smallest segment of this market, but it is growing fast, nearly doubling in the period 2006-2007.³

Given the proximity of Saudi Arabia to Jordan, the physical ICT linkages between the countries, and Saudi's robust ICT infrastructure, it must be a priority market for DZC marketing efforts in the BPO sector.

UNITED ARAB EMIRATES

The UAE's economy is one of the region's more diversified. As a result of a conscious effort, the country has successfully reduced oil and gas's contribution to its GDP to 25 percent. It is also a leader in the region for technology adoption and spending. Despite a population only a tenth the size of Saudi Arabia's, the UAE is the second largest IT market in the GCC, accounting for a third of total IT spending in 2006. Its IT services market grew 41 percent from 2006-2007 to US 791 million, and 18 percent of that figure is represented by outsourcing services.

UAE is one of the few GCC countries currently pushing to become a major platform for global outsourcing services, making it a competitor to Jordan as well as a target market. The Emirates' tech-savvy investors will not require as much awareness-building to present demand for services, and the high cost of communications and human resources there can be highlighted to Jordan's advantage.

BAHRAIN

The steady decline in Bahrain's oil reserves has led it to focus on downstream industries and those requiring high energy inputs. More importantly to BPO marketing efforts, Bahrain has recently transformed itself into an international banking center, and its regional dominance in the financial services sector has led it to become the established global Islamic banking hub. Efforts by the Kingdom to consolidate this position have led to continued investment promotion efforts to attract new Sharia-compliant financial institutions.

Bahrain remains a relatively modest market in terms of IT spending. As Bahrain's banks follow the global financial services sector, however, demand for outsourcing services will undoubtedly heat up.

2.3 TARGET MARKET SEGMENTS AND FUNCTIONS

Based on a number of inputs, including historical market trends, current growth trends in the GCC region, and factors driving investment decisions in the in the BPO sector, the *BPO Sector Strategy* identifies four vertical industry sectors as priority targets for investment promotion efforts in the near term.

FINANCIAL SERVICES, INCLUDING BANKING AND INSURANCE

Historically, the financial services sector has been the earliest adopter of BPO as a business practice. Driven by the high volume of transactions, early adoption of technologies, and the central importance of efficiency in earning profits in high-volume, low margin environments, banks and insurance companies were the vanguard the BPO revolution in the US and western European markets. This is likely to repeat in the GCC region, and in light of the concentration of banks and other non-bank financial institutions in key GCC markets, the increase in consolidations in the sector, and exploding regional growth in IT investment, it is absolutely clear that the financial services sector must be a priority target for DZC investment promotion efforts in the GCC countries.

³ AME Info 2007

Immediate opportunities exist to support banks as they try to meet growing consumer demand for tele-banking and other value-added, front-office services. Drawing on Jordan's cultural and geographical affinities with the GCC countries, Jordanian vendors may be able to position themselves ahead of international vendors in this sector as providers of customer service for **Islamic Banking** and other Shariah-compliant financial services.

TELECOMMUNICATIONS AND IT

As demand for fixed-line and mobile telecom and data services grows in the region, there will be increasing demand for customer service and outbound sales. Similarly, leading software and IT products firms have found the GCC region to be a high growth area, and there is an opportunity to provide them with outsourced services they need to provide technical support and sales.

TRAVEL AND HOSPITALITY

Regional and national airlines are already demonstrating demand for customer support services, and as demand for travel and hospitality in the region grows there is an opportunity to address the related demand for Arabic-language customer support centers.

RETAIL, ECOMMERCE AND MARKETING SERVICES

While the global recession has not spared the GCC or MENA region, consumer spending will remain a mainstay of economies across the region. There is an immediate opportunity to provide call center services to regional retailers both online and off, and to provide outbound services in support of marketing, polling and consumer outreach efforts.

2.4 TARGETS OF OPPORTUNITY AND POSITIONING FOR LONGER TERM MARKETS

Sometime late in the period covered by this marketing plan, perhaps well into the third year, the DZC should be able to leverage the growing experience of its national vendors and expanding "brand recognition" associated with leading Indian vendors to expand its marketing goals. This might include targeting more complex business functions, target markets further afield, or both.

When this expansion of target markets becomes viable will depend on the success of early attraction efforts, as it will be driven by the combination of image building efforts and actual investments breaking ground on Jordanian soil. The presence of Indian vendors, world leaders in the space, will be particularly helpful to build Jordan's reputation as a serious player and justify a new, more aggressive direction in the next BPO sector marketing plan.

Specifically, more experience in Jordan's domestic sector and a concrete presence on the regional and international stage would empower the DZC to expand its target markets in later years to include:

- More complex **back office functions** and larger, more sophisticated service centers
- Leading **international vendors**, beyond India's vendors, which may be attracted to establish service centers to act as nodes in global delivery platforms.
- **Multinational companies** based in or serving GCC markets. These might be attracted to set up captive shared service centers to support their own regional operations.

Learn by Doing 4: Marketing Strategy vs. Targets of Opportunity

It is not expected that Jordan will be ready to address these expanded market goals *systematically* within the period covered by this marketing plan. That is, the overarching goals of this three-year marketing plan are guided by broader market forces, rather than the possibility of higher targets of opportunity. It is quite possible, however, that vendors or end-user companies that meet these “stretch” criteria will investigate opportunities in Jordan, perhaps as a result of proactive relationship efforts by Jordanian vendors.

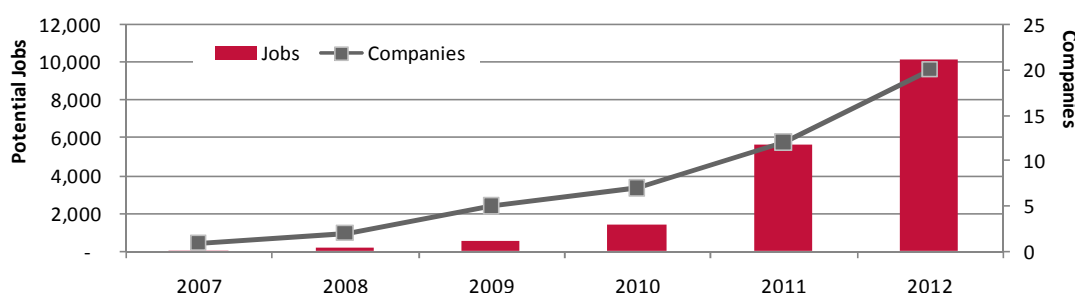
The DZC and its counterpart institutions should be prepared and flexible enough to meet these “target of opportunity” investors with world-class marketing, services and facilities, regardless of their origins or the timing of their inquiry. Over time, the DZC should determine if these targets of opportunity represent a new trend and adjust their longer term marketing strategies accordingly.

3 MARKETING PLAN

3.1 INVESTMENT PROMOTION GOALS

Stated most simply, the goal of this investment promotion and marketing plan is to generate investment into DZC facilities. Based on market demand estimates developed in the *BPO Gap Analysis & Sector Development Strategy* (Figure 1), the DZC should be able to achieve a cumulative of 20 projects by the end of 2012, the period covered by this marketing plan.

Figure 1: Potential Growth in Jordanian Jobs and Company Formation through 2012

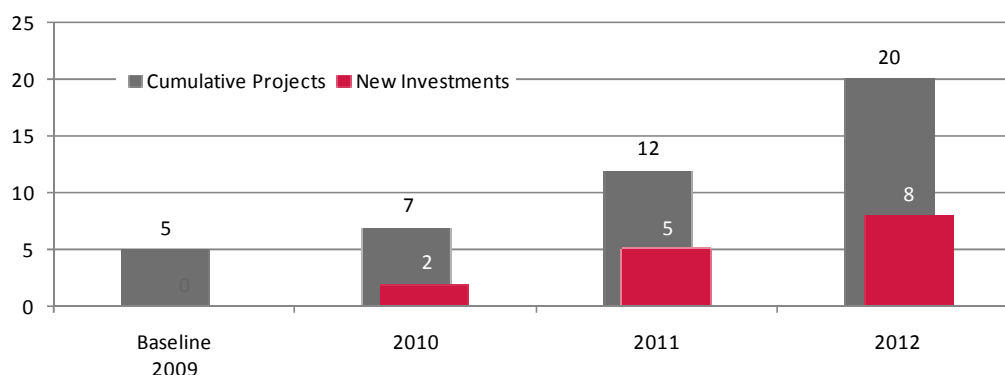


Source: *BPO Gap Analysis & Sector Development Strategy, 2009*

Building on the current baseline of five operating vendors, this implies a total of 15 established projects over the next three years, with two new investments by the end of the first year of the marketing program. As the industry grows in the region, Jordan's marketing efforts create awareness in the marketplace, and early success demonstrates Jordan's viability as investment location, investment should increase in volume over the second and third years of the program.

These estimates are the basis for the investment promotion goals for this marketing and investment promotion plan, depicted in Figure 2. These goals in turn for the basis for the goals and objectives that will be set for each member of the marketing team.

Figure 2: Investment Promotion Goals, 2010-2012

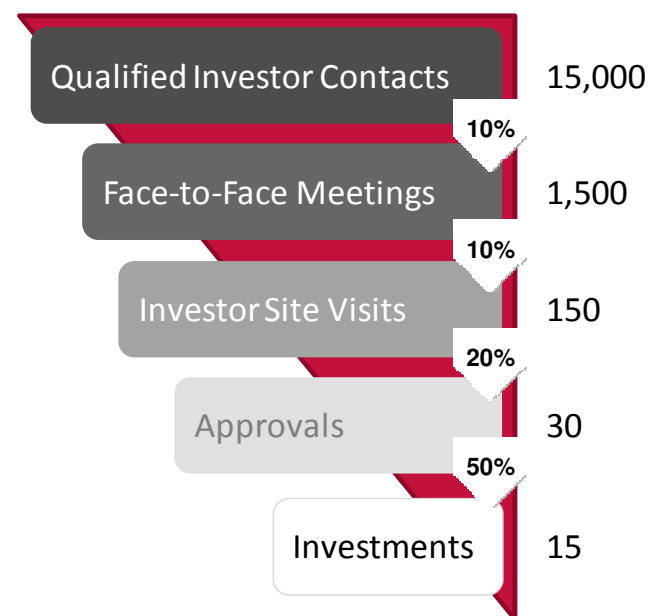


To achieve these targets, the DZC marketing team must generate a **pipeline** of prospective investors, which itself will be the result of extensive communications and proactive relationship-building efforts. Because only a fraction of these prospective investors will “convert” to actual investors, activities in this plan are designed to continuously draw prospective investors into the pipeline and ensure that as many of them as possible follow through each step in the process.

At each major step in the investment generation pipeline, international experience has consistently demonstrated the conversion ratios depicted in Figure 3. That is, for every 1000 *qualified* investors the marketing team contacts, only 10 percent of them will consent to face-to-face meetings. Of these, only 10 percent will be sufficiently interested in Jordan’s offering to visit Jordan and investigate further. From there, only a fifth of prospective investors will seek approvals to set up operations, and only half of those finally “seal the deal” by breaking ground and setting up operations.

The clear implication is that in order to meet its investment promotion goals the DZC marketing team must identify, qualify and proactively interface with some **15,000 qualified business contacts** and conduct more than **1,500 face-to-face meetings** over the next three years.

Figure 3: Conversion Ratios in the Investment Generation Pipeline



Learn by Doing 5: What is a “Qualified” Investor?

It is important to note the use of the word “qualified” in these investor conversion ratios. While it is tempting to interpret these ratios as a call for mass marketing to “reach” the largest number of investors, simply counting heads is not enough.

Qualified investors are already the result of considerable research and analysis. Based on market analysis and intelligence gathering, the marketing team should know that they are investors in target industries that align with the marketing team’s strategic objectives, in companies with resources sufficient to consider investing in Jordan.

3.2 MARKETING ACTIVITIES

Recognizing the overarching objective of generating investment, the activities outlined in this investment promotion and marketing plan are designed with five principal objectives in mind:

- Create and consolidate interest in Jordan as an investment destination for BPO vendors and end-users.
- Identify and understand prospective investors’ business needs, and deliver the message that Jordan is the best location in the region to meet and exceed them.

- Positively influence investors' decision-making process by providing them with timely, targeted, and useful information and follow-up service.
- Open and maintain a relationship and dialogue with prospective investors at multiple "connection points" within a company.
- Constantly generate new leads to maintain and expand the "pipeline" of prospective investors.

Figure 4 below illustrates the array of activities DZC's business development team will engage in, in cooperation with other counterparts, to achieve the goals outlined in this plan.

Figure 4: Investment Promotion Activities Matrix

		Orientation	Promotion	Service
Marketing	Image Building	Trade Press Advertising	Marketing Collateral & Events	Refine Message
	Targeted Promotion	Scoping Mission	Promotion Mission	Mission Follow-up
Support	Research & Intelligence	Sector & Market Intelligence	Mission Support	Company Intelligence
	Logistics & Support	Travel & Scheduling	Travel & Scheduling	Site Visit Support

MARKETING: IMAGE BUILDING

Image building describes those activities aimed at building broad market awareness of Jordan as an investment destination for the BPO sector. These are generally passive marketing techniques, using mass-communication channels and other, relatively untargeted mechanisms to communicate Jordan's value proposition and generally "introduce" Jordan to prospective investors who have likely not considered it as a destination of choice in this space.

One finding of the *BPO Sector Strategy* was that Jordan is not yet known as an investment destination in this sector. While this may be seen as a disadvantage, coupled with the generally favorable view of Jordanian human resources in the Gulf region it presents the very favorable situation of a "blank slate" for image building efforts.

Activities planned under the heading of image building include **Trade Press Advertising**, general **Marketing Collateral**, and **Industry Events**.

Trade Press Advertising

Advertising in targeted industry publications or websites is the very definition of a passive marketing activity. While advertising plays an important role in "getting the word out," the cost efficiency of mass media advertising is quite low.

This marketing plan assumes that advertising will be used sparingly, in support of much more more targeted, proactive activities. To ensure the most efficient use of limited

resources, this marketing plan identifies specific periodicals and websites to address target markets and sectors, avoiding high profile, expensive publications in favor of industry-specific trade press and online resources.

- In **India**, NASSCOM is an important clearinghouse of information for the software and BPO vendor sector. The marketing plan includes budget to advertise on both the NASSCOM website and in targeted newsletters sent to its members.
- In the **GCC Markets**, three regional business publications, including one web-based publication, will serve as the media for image building advertising:
 - *Middle East Economic Digest* (MEED) is a premium business and investment magazine aimed at leaders and decision makers in—and interested in—the Gulf region. The majority of its readers are based in the Middle East region, and nearly 80 percent are senior managers in large organizations. Among the sectors most represented by the readership of this publication, which includes both quarterly print magazines and online access, are Banking and Finance and Telecoms and Communications.
 - *AME Info* (online) is AME Info is a leading business website for news and information from the Middle East. In addition to the extensive website, the company compiles and sends sector-specific newsletters to opt-in subscribers. For a premium, advertising can be highly targeted to subscribers that fit specific target audiences by geography, industry, subscriber data and other criteria.
 - *Gulf Business* is a premium monthly business magazine specifically targeted at decision makers and business leaders in the GCC region, covering subscribers in UAE, Kuwait and Oman, Saudi Arabia, Qatar and Bahrain.

Marketing Collateral

Marketing collateral includes the materials that make up the packages that are handed out, mailed or otherwise distributed as part of a broad marketing effort. At minimum, this should include professionally designed and printed materials, including:

- **Country Profile:** A broad profile of Jordan's business environment and investment framework. It should be general enough to both stand alone as relevant to investors in almost any sector and serve as an introduction to more targeted, sector-specific profiles.
- **BPO Sector Profile:** A targeted profile of the Jordanian business environment and investment framework as it applies specifically to investors in the BPO sector. This should be designed to be presented as a supplement to the broad country profile, as part of a targeted sector package.
- **Targeted Vendor and Vertical Industry Brochures:** Brochures customized to a target industry audience are effective supplements to the more generic country and BPO sector profiles, as they allow a message to be more carefully targeted to the needs of investors in target industries or segments. The present marketing plan assumes targeted brochures will be created for each of the target market segments, including BPO vendors in India and the vertical market segments in the GCC countries.
- **Country Investment Guide:** A country investment guide is a detailed index of materials that would be relevant to an investor seeking to set up operations in Jordan. It should be designed as a reference document, rather than as a multi-media marketing document, and generally assumes an audience of interested investors.

Industry Events: Trade Shows and Exhibitions

Every year, all over the world, industry associations and interest groups gather at trade shows, exhibitions, conventions and other gatherings. Some are global in their reach, attracting companies, vendors, industry trade groups and consumers from all over the world. Others are more regional in reach and scope. Often seen as an opportunity to present new products and services, make personal and professional connections, and simply gather like-minded people together with like goals, these events and exhibitions capture the imaginations of investment promotion teams as the place to be to make connections and generate investment leads.

The reality is that these events, like mass advertising, fall squarely into the passive category of marketing activities. While there is a more personal, face-to-face element of industry trade shows and other events, the sheer volume of attendees, marketing buzz and the undeniably festive atmosphere of these events dilutes the power of any one-on-one connections. So, while a marketing team should aim to make connections with prospective investors, industry trade shows and exhibitions should be seen as an equally important opportunity to *gather* market intelligence.

The marketing plan budget assumes two BDMOs will attend industry events and trade shows, to allow for one to remain stationary with a floor display or booth and the other to make connections with other attendees identified as of strategic interest.

Learn by Doing 6: Getting the Most Return on Investment for Industry Events

Trade shows and other industry events are expensive to attend, and all too often marketing teams fail to plan properly, set goals or follow up sufficiently to ensure that the investment is for more than a nice trip overseas for its BDMOs. Well ahead of any industry event, before approval is granted to participate or travel arrangements are made, the marketing team should engage in intensive market intelligence gathering and strategic planning. Specifically, BDMOs and program managers should:

- **Agree on a concrete strategy for the event.** BDMOs and managers should devise a clear set of strategic goals to be served by participation in the Event. If it is expected to generate leads, then BDMOs should have specific goals for the number of industry practitioners they will meet, including lists of companies most likely to attend the event. They should return with a database of solid leads for follow up communications and potential meetings. To the extent possible, BDMOs should have a full agenda of meetings and likely connections before they even depart for the industry event.
- **Coordinate with Jordanian "Headliners" to generate interest:** Because of the level of investment required to successfully take advantage of trade shows and exhibitions, the DZC investment promotion team should seek to augment their presence with a high-ranking government official or representative of Jordanian industry. Coordinating with diplomatic or trade missions to the host country and inviting other conference attendees to attend a group presentation is one way to take maximum advantage of industry events. The offer of one-on-one meetings with high-ranking Jordanian officials or business leaders can be a strong draw for prospective investors.

Refine Message

Throughout the investment promotions lifecycle, BDMOs, researchers, and other members of the marketing and promotion team will improve their knowledge of target markets, industries and companies. For BDMOs, this will come in the form of contact with industry practitioners, investors, and other sources of valuable information.

Whenever there is an opportunity to update or improve materials, from improving the copy of advertisements to updating the data and messaging included in marketing collateral, there should be a systematic effort to refine the marketing message to reflect new knowledge and market intelligence.

Learn by Doing 7: Investments Are Not Made on Image Alone

Whether because of the appeal of mass marketing or a lack of qualified targeted promotion personnel, many investment promotion teams are tempted to rely too heavily—or even exclusively—on mass market advertising, brochures and trade shows to generate investment. This is a recipe for failure.

While these broad image building activities are an important part of the investment promotion arsenal, they alone are not sufficient to generate the quantity and quality of investment that will be required to meet aggressive promotion goals. Indeed, if these activities are not accompanied by proactive efforts to convert mere market awareness into interested investors, an investment promotion team is better off not spending any resources on these image-building activities at all. Merely advertising and showing up at trade shows is invariably a waste of time, energy and money.

MARKETING: TARGETED PROMOTION

Targeted promotion efforts must be the heart of the investment promotion campaign, and all other activities should be seen as supportive of these proactive efforts. All targeted promotion missions should be preceded by intensive research and market intelligence gathering (see *Support: Logistics and Support*, below) both to ensure the most effective use of mission resources and empower BDMOs and their support staff to focus and target their messaging to individual investors.

Scoping Missions

Scoping missions are designed to acquaint the marketing team with a target market and vertical market segments likely to form the bulk of investment interest there. These should be seen as an orientation trip, aimed at making connections with business associations, chambers of commerce and other “centers of influence” and sources of information. These missions can also be used as an opportunity to connect with Jordan’s own diplomatic and economic representatives in a foreign country. Both are indispensable resources for coordinating and staging future promotion events or scheduling meetings with association members. This sector marketing plan includes one scoping mission to each target market, early in Year 1.

Promotion Missions and Direct Meetings with Investors

Promotion missions into target markets, if properly executed, should be the most effective activities undertaken by the marketing team. Generally, these should be intensive, well supported trips by the country BDMO and at least one support staff member to engage in two types of direct promotion activities:

- **Targeted Promotion Events:** Organizing medium-size promotion events in target markets is an excellent way to meet a large number of company representatives in a minimal amount of time. These may include an introductory presentation to groups of prospective investors, often brought together with the assistance of business groups or associations. These can be informal events, or the mission team can engage facilities and invite prospective investors to a small reception. The feasibility and details of these sorts of mission should be settled during an initial scoping mission. Estimates for the

cost of these sorts of activities are included as part of the incidental expenses associated with promotion missions in the marketing budget.

- **Face to Face Meetings with Investors.** Arguably, the objective of every other investment promotion activity is either to prepare, to facilitate, or to follow up on face-to-face meetings between representatives of Jordan and prospective investors. The BDMO's goal at such meetings is ostensibly to generate enough interest in an investor to initiate a site visit to a DZC facility, but these meetings should also be seen as critical to building long-term relationships and communications channels between the market and the investment promotion team.

The marketing budget includes two outward promotion missions per year to target markets, for a total of six to each over the program period.

Learn by Doing 8: The Importance of the Face-to-Face Meeting

The single most important moment in any successful investment promotion effort is the face-to-face meeting between the BDMO and the prospective investor. This is the best—and perhaps only—opportunity the marketing team will have to directly present Jordan's value proposition directly to decision makers.

Making sure this meeting takes place, that it leaves a positive impression, and that it results in an ongoing relationship with a prospective investor and his or her company should be the overarching goal of every activity the marketing team undertakes. No amount of advertising, desk research or trade-show appearances can substitute for a well-executed presentation and a personal connection, and even when that meeting does not result in an immediate "sale" it serves to build the market presence and network that are critical to long-term success.

Before this critical meeting takes place—and BDMOs should aim to ensure it takes place dozens if not hundreds of times over the course of an investment promotion cycle—a great deal of effort and resources must go into preparing for it. From market research and intelligence gathering to targeted "air cover" in the form of advertising, effort and resources should be aimed at understanding the needs and shaping the perceptions of prospective investors *before* a BDMO and his or her team even set foot in a target market. And after the critical meeting has taken place, sustained follow-on efforts ensure that Jordan remains at the top of investors' minds when they are ready to take their next steps, even if it may be months or years after that first meeting.

SUPPORT: RESEARCH AND MARKET INTELLIGENCE

Research and market intelligence are a critical function in the successful marketing and investment promotion campaign. In the context of this marketing plan, activities include:

- Continuous desk research to identify and anticipate trends and events that may present a challenge or an opportunity for Jordan in the BPO space
- Company research, including phone calls and interviews, to ensure that DZC information about a company, its decision makers and current and future investment decisions is as current and accurate as possible
- Production of timely and actionable internal market intelligence reports for the broader marketing team

The marketing budget includes the cost of telecommunications to target markets, which is assumed to ramp up considerably ahead of all outbound missions, including scoping, promotion and industry events. Also included are assumed ongoing costs for market data,

which may include the periodic purchase of market reports as well as subscriptions to market research and/or company databases.

Memberships in Target Market Industry Organizations

In addition to proactive primary and secondary research efforts, the DZC should actively seek out opportunities to join Industry Trade Associations or other private sector organizations in target markets as sources of market information, intelligence and contacts. The marketing budget includes annual membership fees for NASSCOM, India's premier trade association for BPO vendors and software developers.

The budget also includes estimates for annual memberships in associations in each of the GCC target markets. A number of such organizations exist, and selecting the right one (or ones) should be a focus of the scoping missions planned for each of the target markets.

Learn by Doing 9: The Thankless Art of Market Research and Intelligence

Although research and market intelligence are presented late in this list of marketing activities, this is among the most important, ongoing functions of a marketing team. These activities should precede and underlie every other activity, and they can mean the difference between high returns on marketing investment and simply wasting money. Quality market and company intelligence can mean the difference between setting up face-to-face meetings with quality, interested investors and wasting time on blind phone calls.

Unfortunately, many marketing teams neglect this critical function. The reasons for this are many, including a lack of understanding of its importance, but probably the most common is that it is in fact a difficult activity to get right. While higher levels of investment in market intelligence services and tools can help, there is ultimately no magic bullet. Indeed, entire industries are built on the scarcity of good market intelligence, and there is no substitute for experienced staff engaging in persistent, consistent, targeted research in support of direct marketing activities.

SUPPORT: LOGISTICS AND SUPPORT

In addition to ensuring that the logistical aspects of all outbound promotion missions, inbound site visits and other activities go smoothly, logistics and support staff should be actively involved in supporting inbound investor site visits.

Inward Site Visits

A successful outward promotion mission will result in one or more site visits by interested investors, and indeed they should be encouraged by BDMOs and support staff in follow-up calls. Visiting executives will seek to inspect available infrastructure, meet with zone developers and operators, interview existing investors, and potentially meet with key government officials.

The budget implications of site visits are minimal, as the main resources to be engaged are existing human resources. Modest expenses may be incurred to entertain the visiting investor, ensure their local transportation needs are met, and generally support the provision of world class service and support. No travel budget is included, nor should any be implied; serious investors should be expected to incur all major costs associated with their site visit mission.

Learn by Doing 10: The Value of a Visiting Investor

Recalling the conversion rates depicted in Figure 3 on page 10, the marketing team should need no reminder of how valuable these investors are. Their very presence is a tangible return on investment. Not only do they represent a fraction of the total contacts made over the course of preceding investment promotion activities, but they are demonstrating their interest in Jordan by investing in a trip to investigate for themselves.

Recognizing this, these investors must be met with the highest level of service and professionalism at all steps in their journey. BDMOs should make themselves available to ensure investors are greeted by a familiar face, and they should personally ensure that the prospective investor's needs are met, his or her questions are answered, and any unresolved issue is followed-up and resolved.

3.3 MARKETING AND RELATIONSHIP MANAGEMENT TOOLS

3.3.1 CRM SOFTWARE

With the explicit goal of making contact and cultivating relationships with as many as 15,000 individuals over the course of the next three years, the DZC marketing team must proactively manage all aspects of this process. The marketing budget includes funding for five licenses for a well known Client Relationship Management (CRM) suite designed expressly for the purpose of managing relationships with prospective investors at all stages of contact and subsequent relationships.

The DZC marketing team should proactively ensure that constant entry and updating of whatever CRM solution is adopted is a part of every BDMO and support team member's job. Not only an important productivity tool for staff managing large numbers of contacts, communications and other inputs into a relationship pipeline, CRM software also acts as a critical continuity tool to ensure that staff turnover does not result in lost opportunities or miscommunications.

An effective CRM tools should:

- Keep and organize important relationship details for quick, organized access
- Be easy to use, allowing for quick searches and intuitive access
- Proactively assist staff in managing daily responsibilities, scheduling and tracking activities so important calls, meetings, follow-up and other action items are not overlooked
- Provide for automated communication options to maintain relationships and ensure Jordan remains “top of mind” for prospective investors
- Provide for easy reporting on the status of relationships

To ensure that CRM usage and maintenance is part of every staff member's job, it should be included in the Management by Objective goals defined for each position.

3.3.2 RESEARCH TOOLS

The DZC should plan to invest in one or more market research tools available by subscription or per-use basis. The Marketing budget assumes an average monthly expenditure of **JOD 250**, or **JOD 3000** per year, for general market research tools. This may include access to trade press, analysis and periodicals in commercial media databases such as *Factiva* or downloads from leading international company databases like Dunn and Bradstreet, Kompass or others.

3.4 TARGET COMPANIES

Detailed “starter” lists of target companies are included as Annexes to this report. These lists, drawn variously from desk research, commercial company databases and other sources, should be seen as the beginnings of a company database for the DZC marketing team. Beyond being companies in target sectors, these have not been qualified as interested investors.

Immediate efforts by the marketing team’s researchers and BDMOs should focus on further qualifying and expanding these lists, building the beginnings of a pipeline of prospective investors.

Learn by Doing 11: The Limited Value of “Pre-Qualified” Contact Lists

Investment promotion teams are often tempted by vendors (or simply not knowing where to start) to spend considerable sums on “pre-qualified” databases of companies or executives.

These sorts of lists can play a role at the outset of investment promotion efforts, particularly if they are seen as “seed” company lists to get things started. But the quality of such lists should never be taken for granted, and certainly ever other team that pays the price will have access to the same contacts. As the team successfully reaches out to investors in target markets and build relationships based on their own efforts and market intelligence, their value should definitely wane.

The wise investment promotion team recognizes the limitations of these lists and uses them only when it is clear they will add value quickly, providing real return on investment.

3.5 STAFFING

Table 2 presents the staffing levels recommended to successfully implement the three year marketing plan. The budget assumes one BDMO will be assigned to India, and two BDMOs will each cover activities in two of the four GCC markets. Likewise, one full time researcher will assist the India BDMO with targeted research and intelligence gathering, and two researchers will support the GCC BDMOs. One logistics support staff will book all travel and otherwise support direct marketing efforts for all five target markets.

Table 2: Staffing Levels by Target Market (FTE)

Position	India	KSA	UAE	Bahrain	Qatar	Total
BDMO	100%	50%	50%	50%	50%	3
Researcher	100%	50%	50%	50%	50%	3
Logistics Support	20%	20%	20%	20%	20%	1

For budgeting purposes, BDMO salaries are assumed to be JOD 1500 per month per FTE, Researcher salaries are assumed to be JOD 750 per month per FTE, and logistics and support staff salaries are assumed to be JOD 400 per month.

3.6 MARKETING AND INVESTMENT PROMOTION BUDGET

Based on the assumptions and activities detailed in the three year marketing budget that accompanies this document, the total direct cost of executing this three year marketing and investment promotion plan is **JOD 828,875**. Table 3 below presents a breakdown of this total budget by country and cost category.

Table 3: Summary BPO Sector Marketing Budget, Years 1-3 (JOD, by Country)

	Year 1	Year 2	Year 3	Plan Total
India				
Staffing	27,960	27,960	27,960	83,880
Marketing Support	27,155	25,755	25,755	78,665
Travel	21,147	17,293	17,301	55,742
Other Costs	4,178	2,257	2,258	8,693
Total India	80,440	73,266	73,274	226,980
Saudi Arabia				
Staffing	14,460	14,460	14,460	43,380
Marketing Support	21,131	14,431	14,431	49,994
Travel	14,058	10,769	10,777	35,604
Other Costs	2,974	1,709	1,709	6,392
Total Saudi Arabia	52,623	41,369	41,377	135,370
UAE				
Staffing	14,460	14,460	14,460	43,380
Marketing Support	25,531	18,831	18,831	63,194
Travel	28,788	25,459	25,467	79,714
Other Costs	3,587	2,321	2,321	8,228
Total UAE	72,366	61,071	61,079	194,516
Bahrain				
Staffing	14,460	14,460	14,460	43,380
Marketing Support	21,131	14,431	14,431	49,994
Travel	14,178	10,849	10,857	35,884
Other Costs	2,978	1,711	1,712	6,401
Total Bahrain	52,747	41,452	41,460	135,658
Qatar				
Staffing	14,460	14,460	14,460	43,380
Marketing Support	21,131	14,431	14,431	49,994
Travel	14,466	11,041	11,049	36,556
Other Costs	2,986	1,717	1,717	6,421
Total Qatar	53,044	41,649	41,658	136,351
Program Total	311,220	258,807	258,848	828,875

- **Staffing** includes only direct program salaries—BDMO, research and support staff—based on the staffing levels outlined in Table 2 above. Overall program management and other “overhead” salaries are not included in these figures.
- **Marketing Support** includes communications costs associated with mission preparation, marketing and investor service activities, design and printing costs for advertisements and marketing collateral, postage and shipping costs, and media buys for in-market advertising.

- **Travel** includes airfare, lodging, per diem and incidental costs associated with scoping missions, promotion missions and industry tradeshow and exhibitions.
 - Airfares are based on quoted fares on Royal Jordanian airlines from Amman to major cities in destination markets.
 - Per diem, which includes lodging, based on rates established by the DZC for mid-level staff.
 - The budget model assumes an additional cost for incidental expenses, based on an assumed percentage of per diem rates.
- **Other Costs** includes memberships for professional associations in target markets, trade show registrations, translation, software licenses, and estimates for other fees and expenditures, including contingency estimates.

3.6.1 FUNDING AND IMPLEMENTING THE MARKETING PLAN

While Jordan has long had a number of institutions with varying levels of interest in (or authority over) investment promotion efforts, a comprehensive, proactive marketing campaign of the sort envisioned by this marketing plan has never been implemented. If Jordan is to successfully take advantage of the short—but very real—window of opportunity to become a regional player in the BPO space, a passive approach to marketing will simply not work. It is therefore in the interest of Jordan as a whole, and not just the DZC, to build the capacity and resources necessary to actively “sell” Jordan. Table 4 presents a list of key interested parties and institutions and the roles they should play in implementing this marketing plan and the overall BPO sector strategy.

Table 4: Key Players and Roles in Jordan’s Investment Promotion Framework

Entity	Roles
Development Zones Commission (DZC)	<ul style="list-style-type: none"> ▪ Coordinate and manage sector investment promotion efforts
Master Developers	<ul style="list-style-type: none"> ▪ Fund investment promotion efforts aimed at attracting tenants to their sites
Jordan Investment Board	<ul style="list-style-type: none"> ▪ High level country image marketing
Jordanian BPO Vendors	<ul style="list-style-type: none"> ▪ Support sector promotion efforts ▪ Actively seek out partnerships with international vendors ▪ Build on one-on-one relationships to identify and pursue “targets of opportunity”
BPO Sector Association (Int@j)	<ul style="list-style-type: none"> ▪ Promote the BPO market within Jordan, assisting local vendors to expand their capabilities and build demand for services ▪ Support investment promotion and investor servicing efforts ▪ Conduct public awareness campaigns to build awareness of BPO as business practice and a career for college graduates
USAID-Jordan Economic Growth Program (SABEQ)	<ul style="list-style-type: none"> ▪ Technical assistance to DZC and other institutions and counterparts.

This plan is presented with a unified budget, both to provide a clear view of the resources required to successfully market Jordan as a BPO investment location and to ensure that its various elements are not seen or implemented in isolation. It is not, however, meant to imply that all funding or even implementing staff must be provided by the DZC. As the regulatory body with oversight authority over all of Jordan’s industrial zones, including those areas that will be the primary locations marketed to prospective BPO investors, the DZC has a clear *coordinating* role to play in proactive investment promotion efforts.



ANNEX A - DETAILED MARKETING BUDGETS

ANNEX B TARGET COMPANIES IN INDIA

Company	CEO	Phone	Web Address	HQ Country	Global Locations (including sales)
24/7 Customer	P. V. Kannan	+1 (650) 385-2249	www.247customer.com	India	US, UK, Philippines, Guatemala
Aditya Birla Minacs Worldwide	Deepak J. Patel		www.minacs.adityabirla.com	Canada/India	
AppLabs	Makarand Teje	+91 40 2355 8000	www.applabs.com	India	
Aricent	Sudip Nandy	+1 650 391 1088	www.aricent.com	US/India	US, China, India, Germany, Ukraine, UK, South Africa
Birlasoft	J. Ramachandran	+91-120-662 9000	www.birlasoft.com	India	US, UK, Germany, Netherlands, Czech Republic, Sweden, Australia, Singapore, Malaysia, Hong Kong
CGI Group	Michael E. Roach	+1 514-841-3200	www.cgi.com	Canada/India	
Collabera	Hiten Patel	+1 973-889-5200	www.collabera.com	US/India	US, UK, India
Cybage Software	Arun Nathani	+91-20-66041700	www.cybage.com	India	US
e4e	Somshankar Das	+91 80 6614 5960	www.e4e.com	US/India	UK
Exl Service	Rohit Kapoor	+1 212-277-7100 +91 120 244-5900	www.exlservice.com	US/India	US, India, UK, Philippines
Firstsource	Ananda Mukerji	+91 (22) 6666 0888	www.firstsource.com	India	UK, US, Argentina, Philippines
Genpact	Pramod Bhasin	+91 124 402 2000	www.genpact.com	India	US, Mexico, Guatemala, Morocco, Spain, UK, Netherlands, Poland, Hungary, Romania, China, Japan, Philippines, Australia
Globerian	Naveen Trehan	+1 (914) 844-2000	www.globerian.com	US/India	US, India

Company	CEO	Phone	Web Address	HQ Country	Global Locations (including sales)
HCL Technologies	Vineet Nayar	+91-120-253-5071	www.hcltech.com	India	Australia, New Zealand, China, UK, Germany, Netherlands, Poland, France, Belgium, Sweden, Italy, Japan, Brazil, Malaysia, UAE , Saudi Arabia , Singapore, US
HeroITES	David Turner	+91-124-4099000	www.heroites.com	India	
HOV Services	Suresh Yannamani	+91 44 42203000	www.hovservices.com	India	US, Canada, China, Mexico
HTC Global Services	Madhava Reddy	+1 248.786.2500	www.htcinc.com	US/India	US, India, Australia, Singapore, Malaysia, Hong Kong, UAE
Hinduja TMT Global Solutions	Partha De Sarkar	+91-80-2573 2620	www.htmtglobal.com	India	US, Canada, Philippines, Mauritius
iGATE	Phaneesh Murthy	+91 80 4104 0000	www.igate.com	US/India	US, India, Mexico
Indecomm Global Services	Naresh Ponnappa	+91-80-66960000	www.indecommglobal.com	India	US
Infogain	Kapil Nanda	+1 408-355-6000	www.infogain.com	US/India	US, India, UK, UAE
Infosys Technologies	S. Gopalakrishnan	+91 80 2852 0261	www.infosys.com	India	US, Canada, Mexico, Australia, China, Japan, Belgium, Czech Republic, Denmark, Finland, France, Germany, Ireland, Italy, Norway, Spain, Sweden, Switzerland, Netherlands, UK, Saudi Arabia , Mauritius, UAE

Company	CEO	Phone	Web Address	HQ Country	Global Locations (including sales)
InterGlobe Technologies	Vipul Doshi	+91 (0124) 235 8201	www.igt.in	India	US, UK
ITC Infotech India	Sanjiv Puri		www.itcinfotech.com	India	US, UK, Finland, Sweden, Denmark, Czech Republic
KPIT Cummins Infosystems	Kishor Patil	+91 - 20 - 66525000	www.kpitcummins.com	India	US, UK, Poland, France, Germany, Japan, Singapore, Korea
Larsen & Toubro Infotech	Sudip Banerjee	+91 22 6752 5656	www.lntinfotech.com	India	US, Canada, UK, UK (Northern Ireland), Denmark, Germany, France, Sweden, Japan, Korea, Philippines, Singapore, South Africa
Mascon Global	Sandy Chandra	+91 0124 - 4505360	www.mgl.com	India	US, Mexico, Singapore, Australia
Mastek	Sudhakar Ram	+91 22 6695 2222	www.mastek.com	India	Germany, US, Malaysia, Singapore, UK
Microland	Pradeep Kar	+91 80 3918 0000	www.microland.com	India	US, UK
Mindteck	Pankaj Agarwal	+91 91 80 41548000	www.mindteck.com	US/India	US, India, UK, Netherlands, Germany, Singapore, Malaysia, Bahrain
MindTree Consulting	Ashok Soota	+1 (908) 604-8080	www.mindtree.com	India	
Mphasis	Jeya Kumar	+1 212 686 6655 +1 650 378 8588 +91 80 4004 0404	www.Mphasis.com	US/India	US, UK, Germany, Belgium, India, Singapore, China, Japan, Australia
Neilsoft	Ketan Bakshi	+91 20 2605 3003	www.neilsoft.com	India	US, UK

Company	CEO	Phone	Web Address	HQ Country	Global Locations (including sales)
NIIT Technologies	Arvind Thakur	+91 (11) 4057-0700 x701	www.niit-tech.com	India	US, Austria, Belgium, Switzerland, UK, Singapore, Thailand, Japan, US
Patni Computer Systems	Narendra K. Patni	+91 22 6693 0500	www.patni.com	India	US, Brazil, Canada, Mexico, Czech Republic, Finland, Germany, South Africa, Sweden, Netherlands, UK, UAE , Australia, Japan
Polaris Software Lab	Arun Jain	+91-44-2743 5001	www.polaris.co.in	India	
QuEST	Ajit A. Prabhu	+91 (80) 411 90900	www.quest-global.com	US/India	US, India, UK, Germany, Italy, France, Japan,
Tata Consultancy Services (TCS)	S. Ramadorai	+1 248/619-2800	www.tcs.com	India	US, Canada, Mexico, Argentina, Brazil, Chile, Colombia, Ecuador, Uruguay, Europe (16), UK, Ireland, China, Indonesia, Japan, Malaysia, Philippines, Singapore, South Korea, Taiwan, Thailand, Bahrain, Israel, Saudi Arabia, UAE
vCustomer	Sanjay Kumar	+1 206.802.0201	www.vcustomer.com	US/India	US, India, Philippines

Company	CEO	Phone	Web Address	HQ Country	Global Locations (including sales)
Wipro Technologies	Suresh Vaswani and Girish Paranjpe	+91 (80) 28440011	www.wipro.com	India	US, Brazil, Canada, Mexico, UK, Germany, France, Sweden, Austria, Switzerland, Benelux, Romania, Finland, Portugal, Saudi Arabia, UAE, Egypt , Australia, China, India, Japan, Malaysia, Singapore, Taiwan
WNS Global Services	Neeraj Bhargava	+91 22 4095 2100	www.wns.com	India	US, UK, Philippines, Romania, Sri Lanka, Singapore

ANNEX C - TARGET COMPANIES IN GCC MARKETS

COMPANY NAME	Address	City	Postal Code	Country	Phone Number	Exec 1	Exec 1 Title
GULF INTERNATIONAL BANK BSC (C)	Al Dowali Building 3 Palace Avenue	MANAMA		BAHRAIN	17534000	Sheikh Ebrahi Khalifa Al Khal	Chairman
AL KHALEEJ DEVELOPMENT COMPANY B S C	Seef Tower, Building No 2080, Block No 428 Room 2825	MANAMA		BAHRAIN	17588788		
SEERA INVESTMENT BANK BSC CLOSED	Building 2431 Block 428, Road 2831	MANAMA		BAHRAIN	17566533	Sh. Tahnoon Bin Zayed Al Na	Chairman
ARAB BANKING CORPORATION (B.S.C.)	ABC Tower,Building 152 Diplomatic Area	MANAMA		BAHRAIN	17543000		
AL BARAKA BANKING GROUP B.S.C.	Block 317, Building 238, Al Baraka Tower Road 1704	MANAMA		BAHRAIN	17541122		
GULF FINANCE HOUSE (B.S.C.)	Eastern Tower Bahrain Financial Harbour	MANAMA		BAHRAIN	17538538		
ARAB INSURANCE GROUP BSC	Building 131 Arig House	MANAMA		BAHRAIN	17544444		
AHLI UNITED BANK B S C	Building 2495 Road 2832	MANAMA		BAHRAIN	17585858		
INTERNATIONAL AGENCIES CO. LTD	Building No 4017, Block 304 131, Al Khalifa Avenue	MANAMA	584	BAHRAIN	17228855		
INVESTCORP BANK BSC	Building 499 Investcorp House	MANAMA		BAHRAIN	17532000		
ARAB INTERNATIONAL HOTELS PLC	Jawharet Shmeisani Building Shmeisani Area	AMMAN	11118	JORDAN	65674852		
ARAB BANK PLC.	Arab Bank Building Chaker Bin Zeid Street	AMMAN	11195	JORDAN	65607115	Abdul Hameed Majeed Shoman	Chairman,General Manager
THE HOUSING BANK FOR TRADE & FINANCE	Parliament Street	AMMAN	11118	JORDAN	65005555		
SPECILAIZED TECHNICAL SERVICES COMPANY LTD-STS	Shaaban Building 7th Circle	AMMAN	11195	JORDAN	65802626		
ROYAL JORDANIAN AIRLINES	Housing Bank Complex Area Shmeisani	AMMAN	11118	JORDAN	65202000		
KIPCO ASSET MANAGEMENT	Al Shaheed Tower Khalid Bin Al	SAFAT	13149	KUWAIT	22455587	Entisar Abdul Al	

COMPANY NAME	Address	City	Postal Code	Country	Phone Number	Exec 1	Exec 1 Title
COMPANY KSC (CLOSED)	Waleed Street					Suwaidi	
KUWAIT FINANCE HOUSE KSC	Kuwait Finance House Building Abdulla Al Mubarak Street	SAFAT	13110	KUWAIT	2445050	Bader Abdul M Al Mukhaizeem	Chairman
ARABI HOLDING GROUP CO KSC CLOSED	Ghazali Street	SAFAT	13041	KUWAIT	4817877	Mr. Tareq Mohamme Al Maosharji	Managing Director
PEARL OF KUWAIT REAL ESTATE COMPANY (KSC CLOSED)	Souk Al Kuwait Building Al Abdul Razzaq Square	SAFAT	13099	KUWAIT	2427493	Mahmoud Haje Mohamed Dahdare	Director & Chairman
COMMERCIAL BANK OF KUWAIT (S.A.K.)	Mubarak Al Kabir Street	SAFAT	13029	KUWAIT	22411001	Abdul Fattah Rafie Marafie	Director
NATIONAL BANK OF KUWAIT SAK	Abdullah Al Ahmad Street	SAFAT	13001	KUWAIT	22422011	Mohamed Abdul Rahman Al Bahar	Director & Chairman
KUWAIT AIRWAYS CORPORATION	Kuwait International Airport	SAFAT	13004	KUWAIT	24347777		
THE PUBLIC INSTITUTION FOR SOCIAL SECURITY	Social Security Building Al Sour Street	SAFAT	13104	KUWAIT	2994000	Sheikh Abdull Al Jabber Al Sa	Director-General
THE BANK OF KUWAIT AND THE MIDDLE EAST KSC	JBC East Tower Mubarak Al Kabir Street	SAFAT	13001	KUWAIT	22231200		
KUWAIT PROJECTS COMPANY HOLDING KSC (CLOSED)	Shaheed Tower Khaled Ibn Al Waleed Street	SAFAT	13100	KUWAIT	2412140	Shaikh Hamad Al Ahmad Al Sab	Director & Chairman
GULF INVESTMENT CORPORATION GSC	Kuwait Real Estate Building Jaber Al Mubarak Street	SAFAT	13035	KUWAIT	2225000	Shaikh Fahad Faisal Al Thani	Director
INTERNATIONAL TURNKEY SYSTEMS KSC(C)	ITS Tower Mubarak Alkabeer Street	SAFAT	13128	KUWAIT	2409100		
GULF INSURANCE COMPANY (K.S.C.)	Company Building Ahmad Al Jaber Street	SAFAT	13011	KUWAIT	802080		
THE INTERNATIONAL INVESTOR KSC CLOSED	Wafra Real Estate Building Ahmad Al Jaber Street	SAFAT	13153	KUWAIT	2437070		
GULF INVESTMENT SERVICES	Central Business District, Opposite	MUSCAT		OMAN	783703	Mr. Sunder George	Chairman

COMPANY NAME	Address	City	Postal Code	Country	Phone Number	Exec 1	Exec 1 Title
COMPANY S A O G	Standard Chartered Bank						
NATIONAL BANK OF OMAN SAOG	N B O Building	MUSCAT	112	OMAN	24811711	Abdul Hameed Ahmed Al Balush	Director
BARWA REAL ESTATE COMPANY (QSC)	Barwa Company Building Al Sad Street	DOHA		QATAR	4998888		
INTERNATIONAL INDUSTRY JOINT SYSTEMS WLL	Thala Binal Barrak Midmac Roundabout	DOHA		QATAR	4671940		
AL KHALIJ COMMERCIAL BANK Q.S.C	QNB Building Asia Street 60	DOHA		QATAR	4801361	H.E Sheikh Ha Bin Thani Al-Th	Chairman & Managing Director
QATAR NATIONAL BANK	Qatar National Bank Building Al Corniche Street	DOHA		QATAR	4407407	H.E. Shaikh H Bin Faisal Al T	Director
DOHA BANK (QSC)	Grand Hamad Avenue	DOHA		QATAR	4456600	Sh Abdul Rahm Mohammed Bin Ja	Managing Director
SALAM INTERNATIONAL INVESTMENT LIMITED (Q.S.C.)	Salem Tower Al Fandook Street	DOHA		QATAR	4831415		
QATAR AIRWAYS	Qatar Airways Tower Airport Road	DOHA		QATAR	4496000	HE Sheikh Ham Jassim Bin Jabo	Chairman
NATIONAL TECHNOLOGY GROUP	Rashid Al-Ballaa Building King Abdulaziz Street	RIYADH	11311	SAUDI ARABIA	14768813		
NATIONAL CO FOR COOPERATIVE INSURANCE	ABRAJ Attaawuenya	RIYADH	11632	SAUDI ARABIA	12180100		
BANQUE SAUDI FRANSI	Maather Street Road	RIYADH		SAUDI ARABIA	12891000		
OLAYAN FINANCING CO	Olayan Building Al Khobar Dammam Highway	AL KHOBAR	31952	SAUDI ARABIA	38871000		
SAUDI TELECOM COMPANY	Mursalat	RIYADH		SAUDI ARABIA	14525699	Abdullah Bin Al Fouzan	Director
ARABIC COMPUTER SYSTEMS LTD	Rashid Al-Ballaa Building King Abdul Aziz Street	RIYADH	11461	SAUDI ARABIA	14763777	Mohammed Rash Al Balla'a	Chairman

COMPANY NAME	Address	City	Postal Code	Country	Phone Number	Exec 1	Exec 1 Title
ARAB NATIONAL BANK	King Faisal Street	RIYADH	11564	SAUDI ARABIA	14029000		
SAMBA FINANCIAL GROUP	Samba Financial Group Building King Abdul Aziz Road	RIYADH	11421	SAUDI ARABIA	14774770		
SAUDI BRITISH BANK	Prince Abdul Aziz Bin Mossaad Bin Jalawi Street	RIYADH		SAUDI ARABIA	34050677		
NATIONAL INDUSTRIALIZATION COMPANY	Al Akariyah Building Sitteen Street	RIYADH	11496	SAUDI ARABIA	14767166		
THE ARAB INVESTMENT COMPANY S A	Arab Investment Tower King Abdul Aziz Road	RIYADH	11491	SAUDI ARABIA	14760601	Mohammed Bin Suliman Al Jase	Chairman
AL OLAYAN FINANCING CO LTD	Al Olayan Financing Company Building After Al Tamimi Markets	RIYADH	11492	SAUDI ARABIA	14749000		
AL BALAGHA HOLDING GROUP FOR TRADE LTD	KING Abdullah Street	RIYADH	11534	SAUDI ARABIA	14551002		
THE NATIONAL COMMERCIAL BANK	National Commercial Main Building, Trade Services Center King Abd	JEDDAH	21481	SAUDI ARABIA	26464999	Shaikh Abdull Bahamdan	Director & Chairman
DUBAI INTERNATIONAL CAPITAL (L.L.C)	Dubai International Financial Centre Sheikh Zayed Road	DUBAI		UNITED ARAB EMIRATES	3621888		
LOGICOM FZE	Avenue Showroom Building Opposite Burjuman	DUBAI		UNITED ARAB EMIRATES	45078888		
AL WATHBA NATIONAL INSURANCE COMPANY PSC	Darwish Building, Salam Street	ABU DHABI		UNITED ARAB EMIRATES	26770566	H E Sheikh Sa Bin Mohammed Bi	Chairman
AL JABER HOLDING COMPANY - PSC	Al Jaber Bldg Mussafah Industrial Area	ABU DHABI		UNITED ARAB EMIRATES	25554300		
DUN & BRADSTREET SOUTH ASIA MIDDLE EAST LTD.	The Exchange Building, The DIFC Gate District,	DUBAI		UNITED ARAB	43695700		

COMPANY NAME	Address	City	Postal Code	Country	Phone Number	Exec 1	Exec 1 Title
				EMIRATES			
DUBAI GROUP (L.L.C)	Emirates Towers Sheikh Zayed Road	DUBAI		UNITED ARAB EMIRATES	43300707		
EMIRATES NBD (P J S C)	Emirates NBD Building Beniyas Road	DUBAI		UNITED ARAB EMIRATES	42012002		
MIDEAST DATA SYSTEMS	A,B, C& D Block, Garden Tower F	ABU DHABI		UNITED ARAB EMIRATES	26268444	Mr. Sami Abi Esber	President
AL GHURAIR GROUP (L.L.C.)	Opposite Caterpillar, Al Ghurair Building Salahuddin Street, Dub	DUBAI		UNITED ARAB EMIRATES	42623377	Abdulrahman S Ahmad Al Ghurai	Director
INTERNATIONAL PETROLEUM INVESTMENT COMPANY	Opposite Cultural Foundation, Office Tower Sheikh Zayed the 1st	ABU DHABI		UNITED ARAB EMIRATES	26336555	Sheikh Mansou Bin Zayed Al Na	Director & Chairman
EMIRATES TELECOMMUNICATIONS CORPORATION	Etisalat Building Sheikh Rashid Bin Saeed Al Maktoum Street	ABU DHABI		UNITED ARAB EMIRATES	26283333	Mohammed Saeed Khalfan Al Qamz	Chief Executive Officer
NATIONAL BANK OF ABU DHABI	National Bank of Abu Dhabi Tower Sheikh Khalifa Street	ABU DHABI		UNITED ARAB EMIRATES	26111111	HH Khalifa Mo Al Kindi	Director & Chairman
DUBAI INVESTMENTS PJSC	Enoc House	DUBAI		UNITED ARAB EMIRATES	43379333	Mr. Khalid Jassim Kalban	
ABU DHABI INVESTMENT COUNCIL	Silver Tower Corniche Road	ABU DHABI		UNITED ARAB EMIRATES	26115555	HH Sheikh Kha Zayed Al Nahyan	Chairman
OGER TELECOM LIMITED	Precinct Building 5 Dubai International Financial Center	DUBAI		UNITED ARAB EMIRATES	44284284	Mohammed Ahma Mukhtar Hariri	Chairman
INVESTMENT CORPORATION OF DUBAI	Convention Tower Sheikh Zayed Road	DUBAI		UNITED ARAB	47071333	H.H. Sheikh M Rashid Al Makto	Chairman

COMPANY NAME	Address	City	Postal Code	Country	Phone Number	Exec 1	Exec 1 Title
EMIRATES							
SATYAM COMPUTER SERVICES LTD.	Building 2 Dubai Internet City	DUBAI		UNITED ARAB EMIRATES	43911703		
FAST LANE COMPUTER CONSULTANCY	Union Tower ,No. 203 Sheik Zayed Road	DUBAI		UNITED ARAB EMIRATES	43435300		

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