

**Your BPO Solution**



**Kore Contact Center**

March 2016

# Why Outsource to Jamaica

- ✘ Strategic location and accessibility. A major driver for Jamaican outsourcing is its advantageous location relative to the USA and Canada
- ✘ Only 90 minutes away from Miami via air and over 400 international flights weekly. This facilitates flexibility in travel, shorter travel times and convenience in ad hoc travel situations
- ✘ Being located within the Eastern time zone (UTC -5), interaction with North American offices and Jamaican operations can easily be facilitated during normal business hours



# Why Outsource to Jamaica continued

- ✘ An educated, diverse, and loyal English-speaking talent pool with a population of approximately 2.8 million with a labor force of 1.3 million
- ✘ Jamaica has the 3rd largest English-speaking population in the Americas, behind the USA and Canada
- ✘ As heavy consumers of American media, there is strong cultural affinity between Jamaica and North America – a significant advantage for customer-facing outsourcing activities involving North American customers



# About Jamaica

## ✘ Geographic Area:

- 10,911 km<sup>2</sup> (4,213 sq. miles)

## ✘ Population

- 2.814 m (April 2015)
- 0.2% growth rate (estimated)
- 50%+ of the population lives in urban areas

## ✘ Labor Force

- 1.308 million (2014)

## ✘ Capital City

- Kingston

## ✘ Official Language(s)

- English

## ✘ Major Population Centers (Parish population, 2014)

- Kingston & St. Andrew (668,900)
- Montego Bay (185,500)
- Portmore (520,600)

## ✘ Currency

- Jamaican Dollar (JMD)  
USD 1.00 = JMD \$120.24 (average, Dec 2015)

## ✘ Unemployment Rate

- 13.1 (July 2015)

## ✘ Per Capita GDP

- USD 4,921.65 (April 2015)

## ✘ Literacy Rate

- Total population: 87% (2012) - Youth, 15-24 years: 95.7% (2012)

## ✘ Macro Economic Indicators

- GDP: USD 13.850 (April 2015) - Inflation: 7% (April 2015)

## ✘ Major Economic Sectors

- Agriculture, Financial Services, ICT, Manufacturing, Mining Tourism

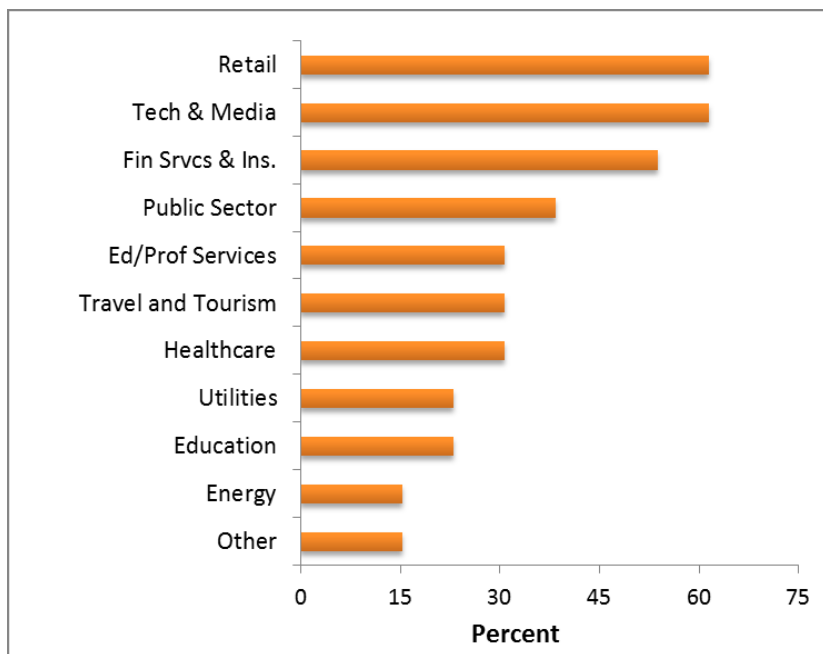
# Jamaica Business Processes Outsourcing

- Over 40 companies offer contact center and Business Processes Outsourcing (BPO) services in Jamaica
- Companies are a combination of captives and outsourcing providers, as well as local and foreign-owned companies
- Majority of operations are located in Montego Bay, Kingston and Portmore
- 23 companies operating over 5 years; 11 companies over 10 years
- Jamaica's outsourcing sector is estimated at 17,000 agents, and generates revenues in excess of USD 500 million annually

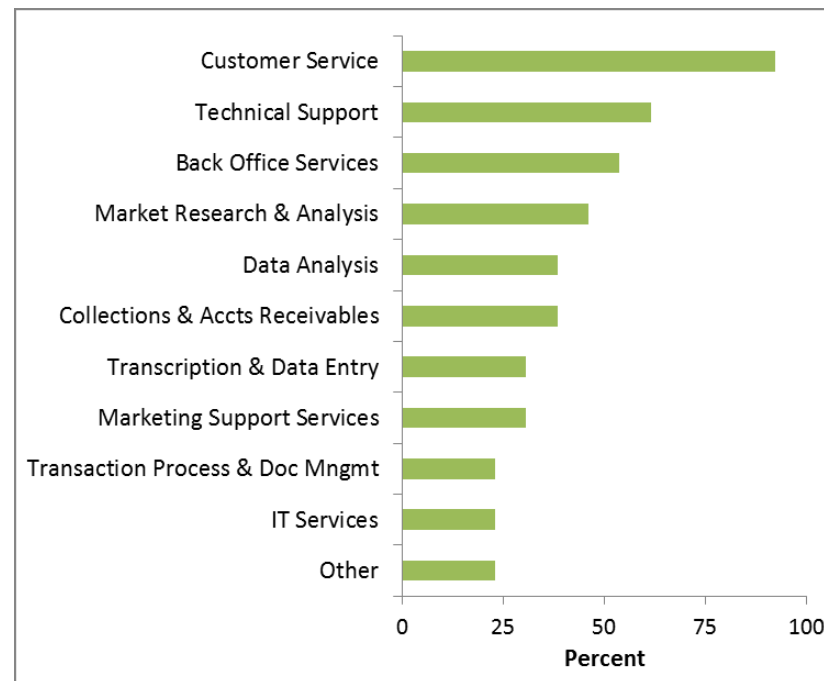


# BPO Sector

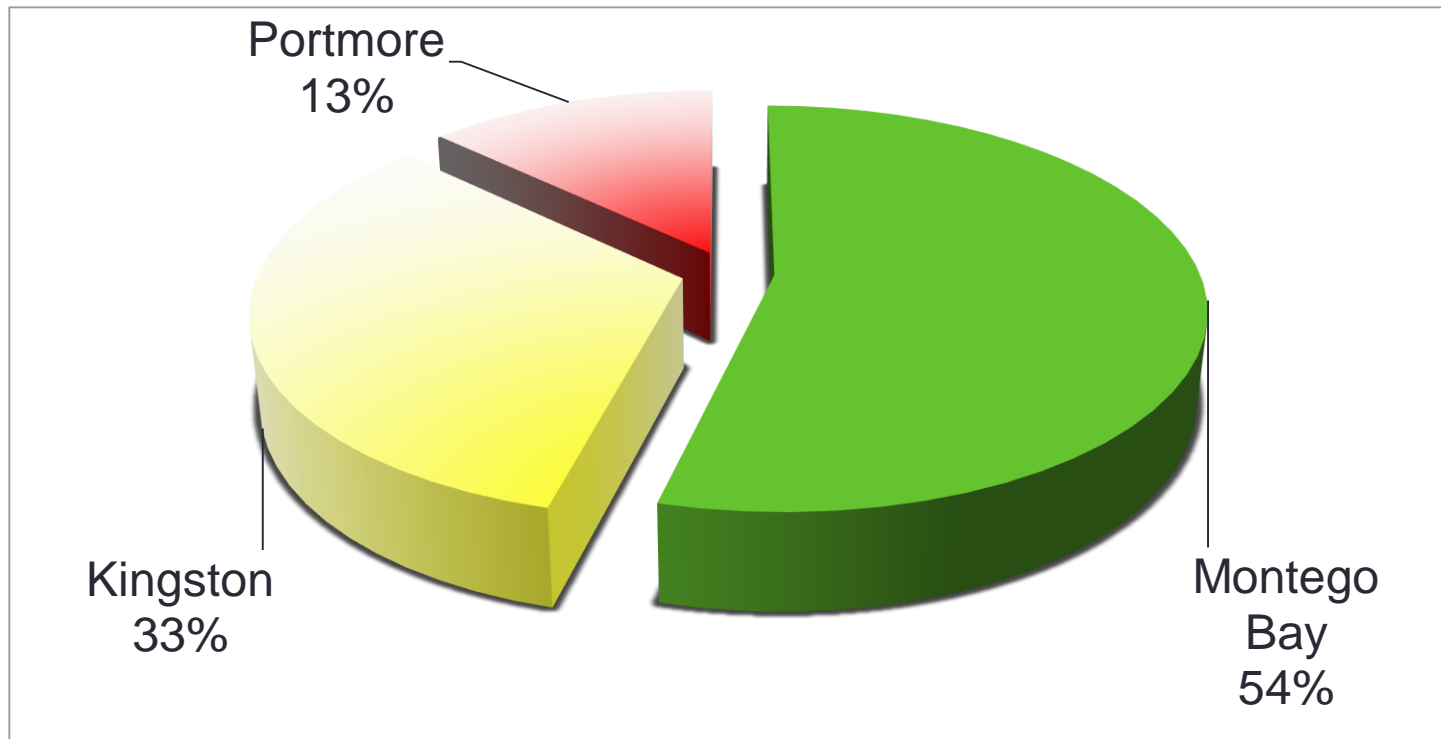
## Industries Served



## Services Provided



# Agent Distribution by Location



# Jamaica Talent

- ✘ Education in Jamaica is based on the British system
- ✘ Primary school curriculum (Grades 1 – 6) has been developed by the Ministry of Education
- ✘ Secondary School curriculum (Grades 7—13) is regionally developed by the Caribbean Examination Council (CXC)
- ✘ CXC administers two examinations:
  - Caribbean Secondary Examination Certificate (CSEC) – formerly O-Levels – at Grade 11
  - Caribbean Advanced Proficiency Certificate (CAPE) – formerly A-Levels – at Grade 13
- ✘ Based on their results at either the CSEC or the CAPE examinations, students can matriculate successfully into a 3-year or 4-year university degree program





# Recruiting

- ✘ In partnership with Caribbean HR Solutions, we apply a robust recruitment process towards filling open job requisitions via our Montego Bay recruiting center.
- ✘ Industry-leading technical solutions are implemented to our in-house training program to both improve the quality of candidates selected as well as improve efficiency to support fast growth.



# English Language Capability

- ✘ Jamaica has the 3rd largest native English-speaking population in the Americas, behind the USA and Canada
- ✘ All tuition across the entire education system (kindergarten to university) is conducted in English
- ✘ As major tourist destination for North American visitors and as a native English-speaking country, Jamaica is well-positioned to excel at voice and customer-facing services
- ✘ Although Jamaicans tend to speak with an accent, it can be easily neutralized
  - However, some firms have opted to maintain the Jamaican accent as customers make favorable/pleasant associations with Jamaica and the agents because of it



# Education Enrollment

Enrollment numbers for 2013/14 are presented in the table below:

Education Level	Description	Enrollment
Early Childhood Education	Kindergarten (3—5 years)	122,372
Primary Education	Grades 1—6	257,460
Secondary Education	Grades 7—13	236,120
Technical & Vocational	Post-secondary	62,451
Tertiary Education	Post-secondary	74,597

# Education Disciplines

Select Disciplines/Sectors	Output
Finance & Management	5,578
Teaching/Education	2,848
Medical & Dental	1,367
Social Science	1,597
Computing	867
Natural Science	1,063
Construction & Surveying	666
Law	187
Engineering	225

- ✘ In 2014, approx. 15,760 students graduated from the main tertiary
- ✘ With enrolment increasing year on year, graduate numbers are also expected to increase
- ✘ The table (left) show graduate numbers for popular disciplines
- ✘ The table does not include outputs from short courses or professional development initiatives for which students do not officially graduate



# Tertiary Education

- ✘ Over 74,000 people enrolled in tertiary-level institutions in Jamaica
- ✘ There are 4 main universities, and over 120 colleges and other tertiary institutions in Jamaica, some of which offer specialty disciplines, e.g. teaching, business, accounting, etc.
- ✘ The four main universities account for 50% of the tertiary enrolment (2013/2014):
  - Northern Caribbean University: 6,165
  - University College of the Caribbean: 3,493
  - University of Technology: 13,150
  - University of the West Indies: 15,515

✘ Source: Economic & Social Survey Jamaica 2014



# Recognitions

## ✘ **Gartner recognition (2014)**

- A location for process expertise in Finance and Accounting
- As an emerging location for cost-effective labor

## ✘ **Global Services Locations Index 2016 (A.T. Kearney):**

- Jamaica ranked 43th out of 55 countries

## ✘ **Doing Business 2015 (World Bank)**

- Jamaica ranked 64th out of 189 countries
- Guatemala ranked 81st; Trinidad & Tobago, 88th; Dominican Republic, 93rd; Philippines, 103rd; India , 130th

## ✘ **Best Countries for Business Report 2015 (Forbes)**

- Jamaica ranked 59th out of 144 countries
- The best country in the Caribbean region and 4th in LAC to do business

## ✘ **Global Network Readiness Index 2015 (World Economic Forum)**

- Jamaica ranked 82nd out of 143 countries
- India ranked 89th, Dominican Republic, 95th; Argentina, 91st; Guatemala, 107th

## ✘ **Global Competitiveness Index 2014—2015 (World Economic Forum)**

- Jamaica ranked 86th out of 144 countries
- Trinidad & Tobago ranked 89th, Dominican Republic, 101st; Argentina, 104th

# Data Services

- ✘ Data services are provided by all national carriers
- ✘ A full suite of IP services is offered, including:
  - -Layer 2 and 3 VPN,
  - Ethernet
  - MPLS services
- ✘ 1—100 Mbps connectivity, through to 10 GB+ circuits available
- ✘ Services can be fully redundant and are available at highly competitive prices
- ✘ High level of support (24/7) available



# Travel & Accessibility

## ✘ Select Transit Times (see table)

- 1.5 hours flying time from Miami
- 4 hours flying time from New York
- 4 hours flying time from Toronto

## ✘ Immigration/Entry

- Jamaica welcomes visitors, visa-free, from a wide cross-section of countries worldwide, e.g.
  - British Commonwealth countries, part of the European Union, and in North America
- Foreign nationals entering the country to conduct short-term business are admissible as 'visitors' in accordance with the entry requirements applicable to the visitors from their respective countries

✘ City	Flying time (Hours : Minutes)	
✘ Atlanta	2:40	
✘ Chicago	3:45	
✘ Dallas	4:20	
✘ Frankfurt	11:30	
✘ London	9:40	
✘ Los Angeles		5:30
✘ México City	5:30	
✘ Miami	1:25	
✘ Montreal	4:00	
✘ New Orleans	3:00	
✘ New York	3:45	
✘ Toronto	3:50	
✘ Washington D.C.	3:10	
✘ Paris	10:40	



## Montego Bay Free Zone

Overlooking the tranquil and pristine waters of the Bogue Lagoon, the Montego Bay Free Zone (MBFZ) currently has over 600,000 sq. ft. (55,762 sq. m.) of space divided in a ratio of 56% and 44%, ICT activities and warehousing/manufacturing, respectively.



## G-West Center

Centrally located in the Fairview corridor, fast becoming Montego Bay's new commercial hub, this beautifully designed complex is ideally situated and convenient for the call center employee.



## Barnett Tech Park

- Located in the heart of Montego Bay with the capacity to develop 500,000 square feet of space in Phase 1
- All infrastructure installed
  - Roads & Sidewalks
  - Potable Water
  - Sewer Mains
  - Storm drains
  - High Speed Internet with redundancy
  - Clean Electricity Supply – dedicated supply from Bogue power station

