

MENA TALENT MAP

The future of outsourcing and potential
opportunities for emerging countries in
the MENA region

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Acronyms

List of acronyms

ACRONYMS	DESCRIPTION
BDD	Beirut Digital District
BCG	Boston Consulting Group
MENA	Middle East and North Africa
ISIC	International Standard Industrial Classification of All Economic Activities
WEF	World Economic Forum
OECD	Organization for Economic Co-operation and Development
ILO	International Labour Organization
SOC	Standard Occupational Classification
BPO	Business Process Outsourcing
ITO	Information Technology Outsourcing
KPO	Knowledge Process Outsourcing
UAE	United Arab Emirates
KSA	Kingdom of Saudi Arabia
UK	United Kingdom
GDP	Gross Domestic Product
CAGR	Compound Annual Growth Rate
SMEs	Small and Medium-sized Enterprises
KPI	Key Performance Indicator
SEZ	Special Economic Zone
AI	Artificial Intelligence
IP	Intellectual Property
HRM	Human Resource Management
CRM	Customer Relationship Management

Definitions

List of definitions

TOPIC	DEFINITION
Supply	Talent supply from third parties to fulfill select jobs that are outsourced from other entities and countries
Demand	Entities and countries that are outsourcing select jobs, rather than fulfilling them in-house, and are in search of third-party talent to occupy select jobs
Focus countries	Six countries in the MENA region - Lebanon, Jordan, Iraq, Egypt, Morocco, and Tunisia – whose value proposition and talent potential were assessed, in order to supply talent to occupy offshore jobs that are subject to outsourcing
Areas of focus	Services within job clusters and sub-clusters that focus countries are well equipped and should aim to supply talent for

01Executive summary

1.1 Executive Summary

In a fast-changing world with workplaces in flux and vigorous new workforces emerging, enormous opportunities arise. Job outsourcing is among the richest.

The outsourcing practice began with large corporations in developed countries outsourcing non-core and basic functions – call centers, payroll, etc. – to developing countries. It helped businesses reduce costs and focus on core differentiators. As organizations grapple with seismic shifts driven by nonstop technological innovation, pandemic- and climate-driven disruptions, and geopolitical upheaval, the job outsourcing market is reconfiguring in parallel. No longer just in the province of non-core functions, outsourcing is increasingly embraced as a key solution to critical talent shortages. It is tapping into new sources of sophisticated labor and core functional expertise along the value chain.

So, what happened? As the workforce evolved, so too did outsourcing. Digitalization has disrupted the workplace, creating jobs while eroding others, and transforming long-standing labor market paradigms. This has led to the diminishing of human involvement in mainstream jobs; for example, jobs like telephone operator and data entry typist are giving way to sophisticated AI and machine learning tools. In parallel, the demand for other, more sophisticated jobs has soared, creating a global talent shortage, and recasting outsourcing as a platform for accessing highly skilled talent.

The future of job outsourcing is evolving. It will continue to expand into more sophisticated jobs, maintain coverage of intermediary ones, and reduce emphasis on mainstream jobs, especially those most affected by digitalization and automation.

As outsourcing evolves, so do the opportunities it offers. Hence, this study examines the opportunities for six countries in the Middle East and North Africa (MENA) region – Lebanon, Jordan, Iraq, Egypt, Morocco, Tunisia – to supply talent for outsourced jobs, promoting skill development, employment, and economic stability.

With its highly qualified, multilingual, and cost competitive labor force, Lebanon has great potential to become a talent supply hub for offshore work. However, challenges, including political and economic risks, may threaten its

outsourcing prospects. Lebanon is well positioned to supply talent in six areas: customer relationship management services; software/ applications development and integration; engineering design and consulting services; marketing services; business consulting and market research services; and telemedicine and remote education.

Jordan also shows excellent potential to grow into a talent supply hub for offshore jobs, with its highly qualified labor force, attractive market environment, advanced telecom infrastructure, and favorable regulatory landscape. It nevertheless faces challenges, including the absence of data protection laws. Jordan is well positioned to supply talent in six areas: customer relationship management services; software/ applications development and integration; engineering design and consulting services; finance and accounting services; business consulting and market research; and telemedicine and remote education.

Iraq could evolve into a talent supply hub for basic offshore jobs, leveraging its cost competitive labor force, operational Special Economic Zones, and low corporate tax rates. However, critical challenges, such as political risks and lagging telecom and physical infrastructures, threaten to undermine its outsourcing prospects and lower the workforce’s attractiveness. Iraq is positioned to supply talent in four areas: customer relationship management; human resource management; content and document processing; and IT consulting and support.

Egypt has strong potential to become a talent supply hub for offshore jobs, thanks to a qualified and cost-competitive labor force, attractive market environment, and digital and physical infrastructure. Such ambitions would be challenged, however, by limited government involvement in facilitating set-up of outsourcing businesses. Egypt is well positioned to supply talent in six areas: customer relationship management; engineering design and consulting services; software/ applications development and integration; finance and accounting services; media services; and marketing services.

Its well-established outsourcing ecosystem, attractive market environment, and strong digital and physical infrastructure give Morocco excellent potential to grow as a talent supply hub for offshore jobs. However, it will need to address challenges, including limited labor availability and labor cost competitiveness. Morocco is well-positioned to supply talent in five areas: customer relationship manage-

ment; human resource management; software/ applications development and integration; business consulting and market research; and legal services.

Finally, Tunisia also exhibits great potential to accelerate its current momentum and become a talent supply hub for offshore jobs. It boasts a multilingual and cost-competitive labor force, well-established outsourcing ecosystem, attrac-

tive regulatory landscape, and developed digital and physical infrastructure. However, challenges including political and economic risks must be managed to safeguard the country’s outsourcing prospects. Tunisia is well positioned to supply talent in four areas: customer relationship management; content and document processing; software/ applications development and integration; and engineering design and consulting services.

٢,١ الملخص التنفيذي

في عالم يشهد تغيّرات متسارعة، وفي ظل التغير المستمر الذي تشهده أماكن العمل وظهور قوى عاملة جديدة تتسم بالقوة والحياة، تبرز فرص جديدة هائلة، ومن بين أكثرها ظهوراً فرص التوظيف الخارجي للوظائف.

بدأت ممارسة التوظيف الخارجي مع إسناد الشركات الكبرى في البلدان المتقدمة الوظائف الأساسية وغير الرئيسية، مثل مراكز الاتصال وكشوف الرواتب وغيرها، إلى الدول النامية، حيث ساعدتهم ذلك في تقليل التكاليف والتركيز على العوامل المميزة الرئيسية. وبينما تكافح المؤسسات مع التحولات الجذرية التي تقودها الابتكارات التقنية المستمرة، والاضطرابات الناجمة عن الأوبئة والمناخ، والاضطرابات الجيوسياسية، يعيد سوق التوظيف الخارجي للوظائف تهيئة نفسه بالتوازي. حيث لم تعد تقتصر الممارسة على إسناد الوظائف غير الرئيسية فحسب، بل يتم تبني التوظيف الخارجي بشكل متزايد كحل رئيسي للنقص الشديد في الكفاءات والمواهب، ويتيح إمكانية الاستفادة من مصادر جديدة من العمالة المتطورة والخبرات الوظيفية الأساسية على طول سلسلة القيمة.

فما التغييرات التي حدثت؟ في الوقت الذي تطورت فيه القوى العاملة، توسع نطاق التوظيف الخارجي كذلك. حيث عرقل التحول الرقمي أماكن العمل، وساهم في استحداث وظائف جديدة مع القضاء على بعضها، وإحداث تحول في نماذج أسواق العمل القديمة. وأدّى ذلك إلى تقليص المشاركة البشرية في الوظائف الأساسية، على سبيل المثال، أفسحت وظائف مثل مشغل الهاتف وكاتب إدخال البيانات المجال لأدوات الذكاء الاصطناعي والتعلم الآلي المتطورة. وفي الوقت ذاته، ارتفع الطلب على وظائف أخرى أكثر تطوراً، مما خلق نقصاً عالمياً في الكفاءات والمواهب، وأعاد صياغة التوظيف الخارجي كمنصة للوصول إلى الكفاءات الموهوبة والمتميزة.

يشهد مستقبل التوظيف الخارجي للوظائف تطوراً كبيراً، وسيستمر في التوسع ليشمل وظائف أكثر تعقيداً وتطوراً، والحفاظ على مستوى تغطية الوظائف الوسيطة، وتقليل التركيز على الوظائف الأساسية، وخاصة الوظائف الأكثر تأثراً بالتحول الرقمي والأتمتة.

ومع تطور التوظيف الخارجي للوظائف، تتزايد الفرص التي يتيحها، وبالتالي، تبحث هذه الدراسة في الفرص المتاحة لست دول في منطقة الشرق الأوسط وشمال أفريقيا – وهي لبنان والأردن والعراق ومصر والمغرب وتونس – لتوفير الكفاءات والمواهب للوظائف التي يتم تعهدها خارجياً، وتعزيز تنمية المهارات والتوظيف والاستقرار الاقتصادي.

يتمتع لبنان، مع قوته العاملة متعددة اللغات ذات الكفاءات العالية والميزة التنافسية من حيث التكلفة، بإمكانات كبيرة ليصبح مركزاً لتوفير

العاملة متعددة اللغات ذات التكلفة التنافسية، ومنظومة التعهيد الخارجي الراسخة، والمشهد التنظيمي الجذاب، والبنية التحتية الرقمية والمادية المتطورة. إلا أنه يتعين إدارة التحديات، بما في ذلك المخاطر السياسية والاقتصادية، لحماية فرص الدولة في التعهيد الخارجي. وتحظى تونس بمكانة فريدة لتوفير الكفاءات والمواهب في أربعة مجالات: إدارة علاقات العملاء، معالجة المحتوى والوثائق، تطوير البرمجيات/ التطبيقات وتكاملها، التصميم الهندسي والخدمات الاستشارية.

وتنافسية تكلفة القوى العاملة. كما يحظى المغرب بمكانة فريدة لتوفير الكفاءات والمواهب في خمسة مجالات: إدارة علاقات العملاء، إدارة الموارد البشرية، تطوير البرمجيات/ التطبيقات وتكاملها، استشارات الأعمال وأبحاث السوق، الخدمات القانونية.

وأخيراً، تُظهر تونس كذلك إمكانية كبيرة لتسريع زخمها الحالي وتصبح مركزاً لتوفير الكفاءات والمواهب للوظائف الخارجية. حيث تتميز بقوتها

02 Introduction

2.1 Study context

Forward MENA collaborated with the Boston Consulting Group (BCG) to conduct this study aimed at fostering the growth of remote work ecosystems in six developing countries in the Middle East and North Africa (MENA): Lebanon, Jordan, Iraq, Egypt, Morocco, and Tunisia.

The goal is to help transform these focus countries into talent hubs of the future, with skilled workforces fully enabled to serve large markets. Study insights will provide these countries with a roadmap for positioning their workforces and remote work ecosystems to serve clients in nearby markets looking to outsource parts of their value chain.

The analysis will apply two lenses:

- **A “supply” or talent pool lens.** Investigating the focus countries’ competitive advantages, including workforce availability and qualifications, market environment, infrastructure, regulatory landscape, etc. to assess the countries’ potential for talent pool supply for offshore jobs in key markets.
- **A “demand” or job outsourcing needs lens.** Identifying key markets, especially markets in geographical

proximity to the countries of focus, where the number of jobs outsourced is significant and large opportunities exist to tap into the focus countries’ workforce.

The study aims to foster the growth of remote job ecosystems in the six MENA focus countries, enabling them to supply talent for jobs outsourced in other markets and countries. It will also benefit countries with workforce shortages, allowing these “demand markets” to access skilled and abundant talent with a solid supporting ecosystem.

The study promotes focus countries’ economic growth. Its recommendations on upskilling today’s workforce and equipping the next generation with much needed skills will expand employment opportunities and drive down unemployment.

2.2 Job outsourcing interpretations

What is job outsourcing? Interpretations vary, based on who is providing the description. After all, job outsourcing refers to the business practice of sourcing-in talent from an outside party to perform job functions that are traditionally performed in-house.

A 2D matrix (Figure 1) captures these different interpretations, organized by type of outsourcing performed and geography from which talent is sourced.

Figure 1 - Outsourcing interpretations

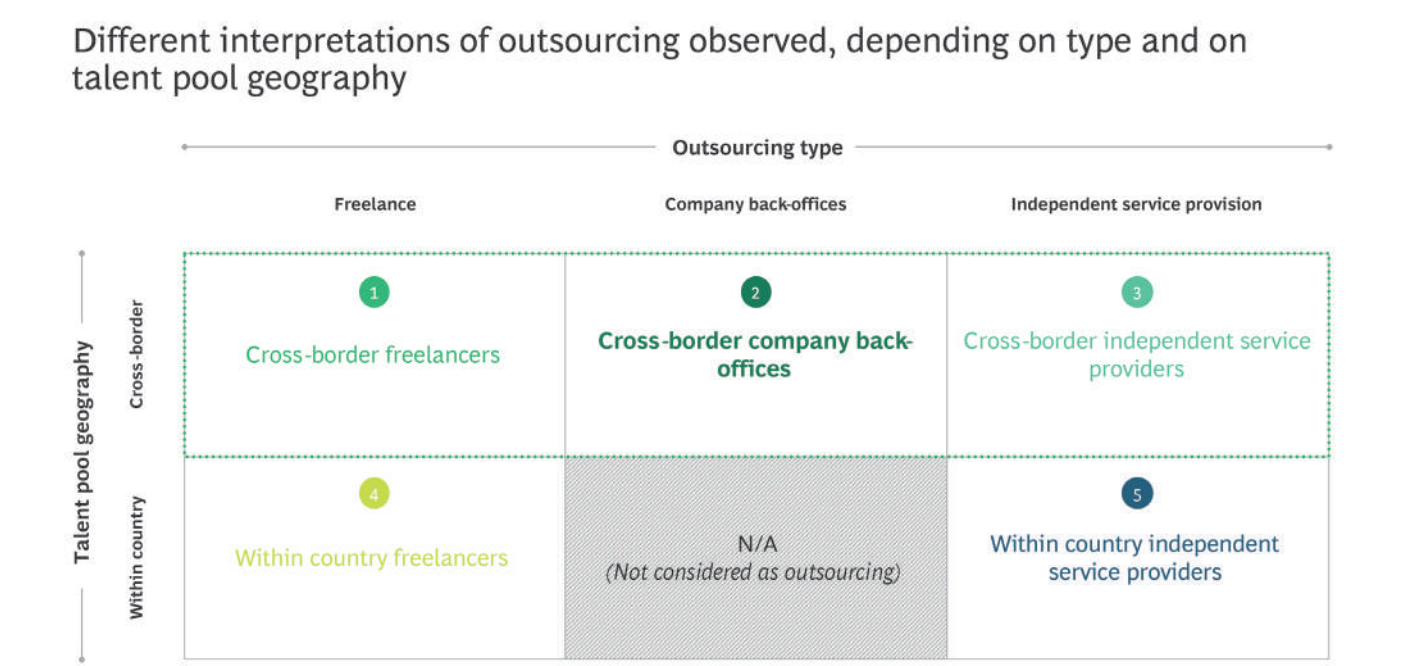
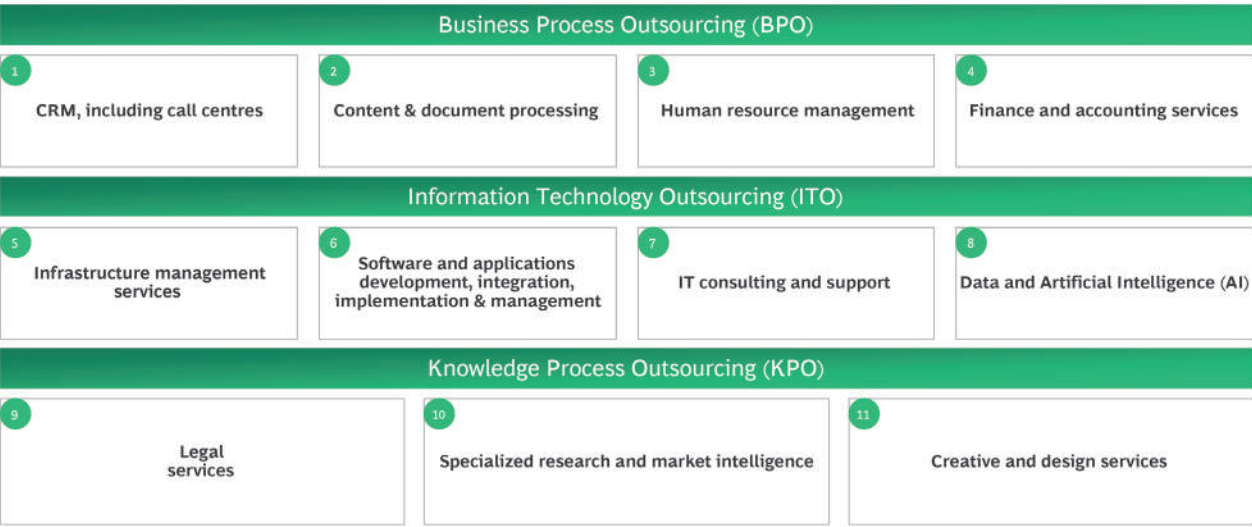


Figure 2 - Job clusters

11 job clusters within three job outsourcing categories identified



This yields five interpretations of outsourcing:

- **Cross-border freelancers.** Individuals providing services on a part-time, freelance basis, via part-time contracts and short-term assignments/ affiliations, to select organizations outside the individual’s country of residence.
- **Cross-border company back offices.** “Internal” offices/ departments within organizations, set up in geographies different from the organization’s head office.
- **Cross-border independent service providers.** Companies utilizing the services of other companies, via part-time contracts and short-term assignments, located in different geographies/ countries.
- **Within country freelancers.** Individuals providing services on a part-time, freelance basis, via part-time contracts and short-term assignments/ affiliations, to select organizations within the freelancer’s country of residence.
- **Within country independent service providers.** Companies utilizing the services of other companies, via

part-time contracts and short-term assignments, located in the same geography/ country.

As the aim of this study is to identify potential to establish remote work ecosystems in the six focus countries to supply labor-force to markets abroad, three interpretations are relevant here: (1) cross-border freelancers, (2) cross-border company back offices, (3) cross-border independent service providers.

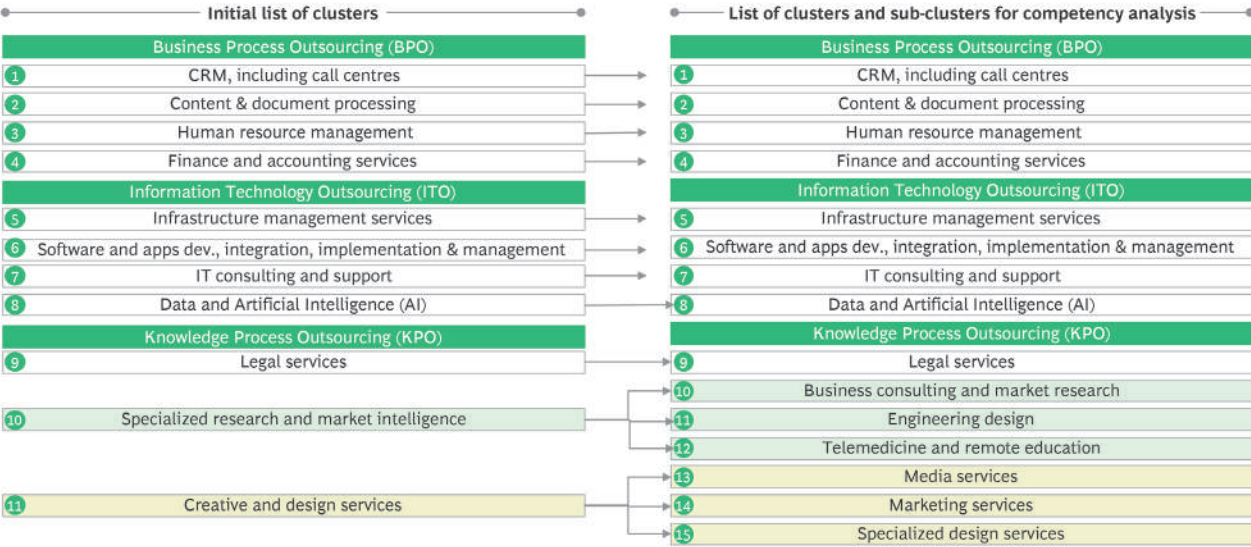
2.3 Jobs and job clusters

One key aspect of this study is to understand the jobs or functions that either have been frequently outsourced or that have potential to be. As such, a bottom-up assessment was conducted starting with 400+ job classes leveraging the International Standard Industrial Classification (ISIC) and applied filtering lenses (see appendix section 12.1 for further details) to shortlist 11 job clusters with large outsourcing potential (where each cluster is composed of multiple jobs).

Some of the clusters (Figure 3) were carved out into sub-clusters to cater for differences in their specificities and characteristics.

Figure 3 - Sub-cluster breakdown

Few clusters were carved out into sub-clusters, to cater for their specificities and different characteristics



03 Demand: Key markets with large number of jobs outsourced

3.1 Job outsourcing trends

The past decade has seen rapidly changing labor market dynamics, with new jobs constantly being created and others diminishing or even disappearing. Key trends recently impacting the labor market include:

- **Digital transformation.** The surge of digitization has helped create new job opportunities (Figure 4), with organizations' need for digitally skilled and "tech-enabled" employees significantly rising. However, digitization has also accelerated the shrinkage of certain occupations, where humans' role has been marginalized.
- **Talent pool shortage.** Markets have been suffering globally from talent shortages. Organizations are not

only having to bear the burden of finding talent, but also retaining it. Such shortages have driven policymakers to introduce measures to tackle the issue and try to "future-proof" their local workforce.

- **Rise of the gig economy.** The gig economy has experienced a rapid growth, especially since the Covid-19 pandemic outbreak (Figure 5). It has become a desirable career path, offering employees flexibility, and opportunities to tap into microwork and part-time roles.
- **Upsurge in high-skilled workers.** Share of employment in high-skill occupations has increased in both developed and developing countries (Figure 6), with a greater demand for workers who can undertake non-routine cognitive tasks, such as high-skilled research.

Figure 4 - Digitization job opportunities

Digitization is creating job opportunities in new markets and increasing employment in some existing occupations
The global workforce can absorb around ~150 M new technology-oriented jobs over the next 5 years

Digital job capacity from 2020-2025

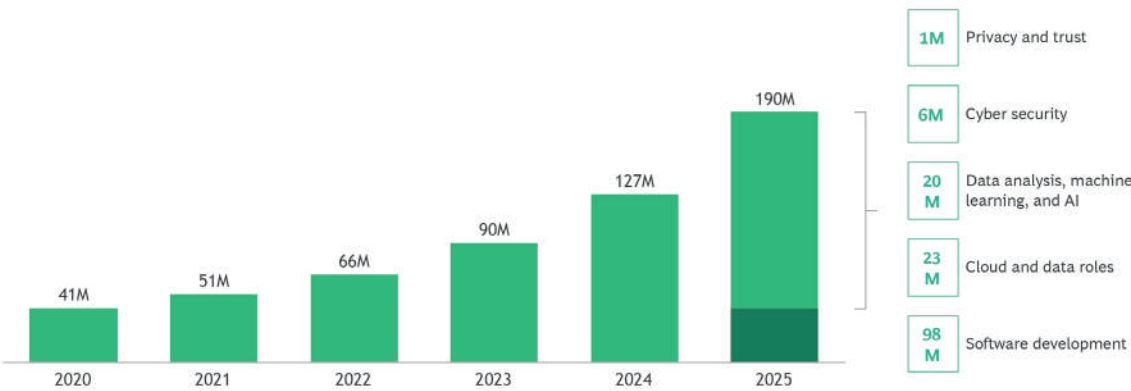


Figure 5 - Growth in gig economy

Technological innovation and growing globalization have led to structural shifts in labor markets...

...leading to significant growth in the gig economy

Factors leading to structural shifts in labor markets

- 1 Rise of the sharing economy and online platforms such as Uber, Airbnb
- 2 Increasingly mobile and remote workforce thanks to the internet
- 3 High rates of unemployment amidst the global economic downturn
- 4 Entrance of the millennial generation (population aged 25-34) into the workforce

Gross volume of the Gig Economy 2018-2023 (\$B)

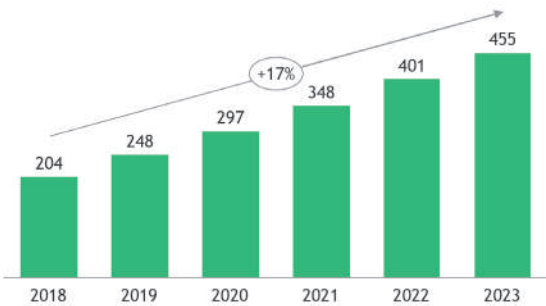
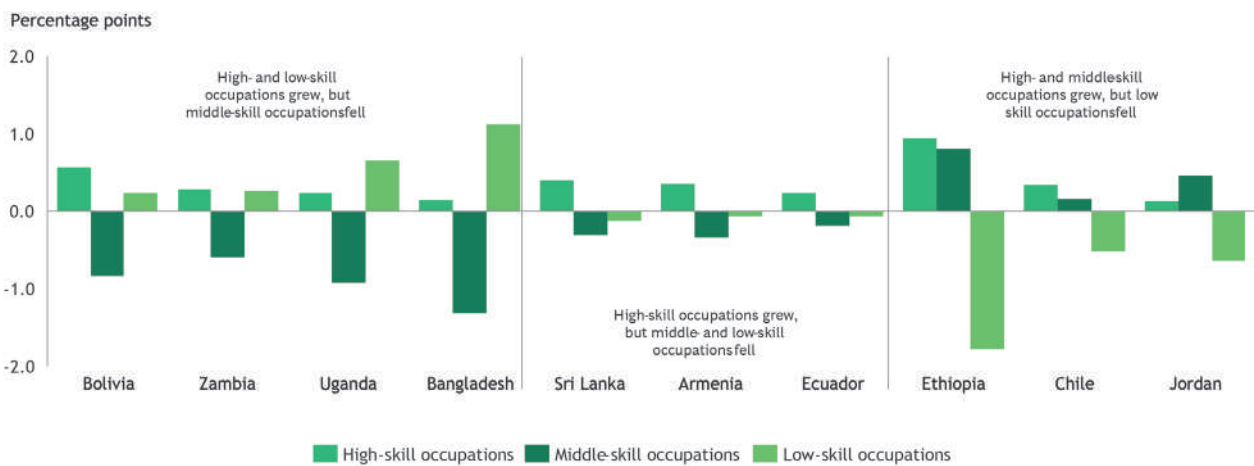


Figure 6 - Share of employment in developing countries

In many developing countries, the share of employment in high-skill occupations has increased

Annual average change in employment share, by occupation skill level, circa 2000-circa 2015



In light of key labor force shortages, global war for talent, and digital advancement in the workplace, a significant increase in jobs and functions being outsourced took place. Thus, the trend in the growth of demand for outsourcing services is positive, with the global outsourcing market expected to grow at a CAGR of 8.5% between 2021 and 2028 (up from 5.6% CAGR between 2017 and 2021).

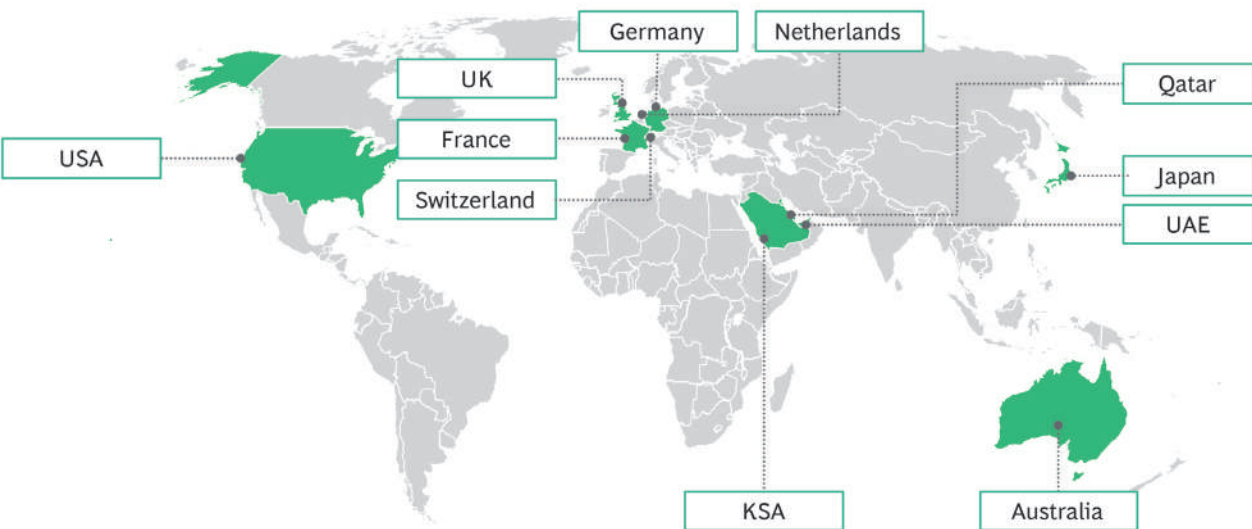
Outsourcing can then benefit corporations in multiple ways:

- **Cost reduction.** Outsourcing has traditionally been one of the most effective ways of reducing operating costs and increase value margin (e.g., cost reduction through labor arbitrage and/or scalability).
- **Focus on core functions.** Outsourcing allows organizations to dedicate time and focus, making optimal use of key resources and deprioritizing non-core functions (e.g., payroll, finance, and accounting).
- **Talent pool access.** Outsourcing helps address skill shortages by allowing organizations to delegate tasks to regions where talent supply is more abundant, and gain access to intellectual capital.
- **Expertise delegation.** Outsourcing addresses capability issues and can help improve the quality of services typically delivered by experts (e.g., experts in process, quality, and delivery).

Parallel to labor market changes and disruptions, the future of job outsourcing is gradually evolving to further cover the more sophisticated jobs, maintain its coverage of intermediary jobs, but diminish coverage of mainstream jobs, especially ones most affected by digitalization and automation.

Figure 7 - Demand hot-spots

Summary: Identified 11 prominent demand hot-spots regionally and globally



This evolution is driven by major trends that have been shaping the outsourcing market in recent years, including:

- **Automation of repetitive tasks.** Automation is replacing the labor force performing repetitive tasks and back-office functions.
- **Upsurge of sophistication.** Outsourcing has expanded to include more sophisticated business functions, requiring more technical skills and competencies.
- **Continuous upskilling.** As per the WEF, “the window of opportunity to reskill and upskill workers has become shorter in the newly constrained labor market.”
- **Niche targeting.** Start-ups and scale-ups are increasingly outsourcing parts of their value chains, reflecting their smaller budgets and need to look overseas for cost-effective talent.

3.2 Key demand hot spots and prominent job clusters

Eleven markets or “hot spots” with significant talent shortages and high number of jobs to be potentially outsourced were identified (Figure 7) based on an assessment of global labor market trends, outsourcing specific trends, job clusters’ growth potential and factoring-in employers’ perspective on potential job outsourcing opportunities and gaps,

These markets are: USA, United Kingdom, Switzerland, France, Germany, Netherlands, Saudi Arabia, United Arab Emirates, Qatar, Japan, and Australia.

Job clusters with positive future outsourcing prospects were identified by analyzing:

1. Overall labor market trends and projections, including outsourcing-specific trends.

These trends impact outsourcing service providers’ value proposition, offering, and operations. Key learnings include (see appendix section 12.2 for further details):

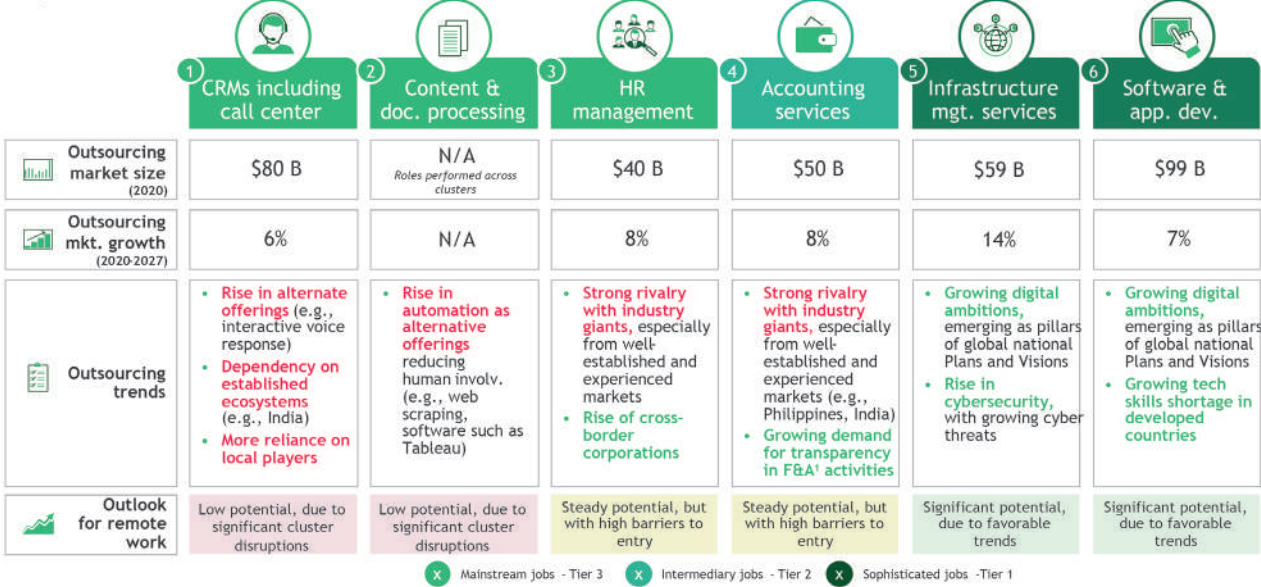
- Focus less on BPO jobs, whose demand is at risk of declining.
- Focus more on “higher-sophistication” jobs and accompanying skills.

- Continue upskilling their workforce in line with job disruptions and trends, to remain competitive.
- 2. Supply both traditional entities and also smaller niche targets (with less competition).
- 3. Cluster-specific outsourcing trends and projections (including both data-driven and qualitative analyses).

Clusters’ outsourcing market sizes, growths, and other trends (Figures 8 and 9) highlight stagnation of mainstream job clusters and growth in sophisticated ones, in line with overall workplace expectations. Where mainstream job clusters are expected to grow, it might be attributed to automation rather than human involvement.

Figure 8 - Job clusters outsourcing trends (1)

Outsourcing trends imply stagnation of mainstream job clusters and growth of sophisticated ones (1/2)



Source: 1. Finance and accounting

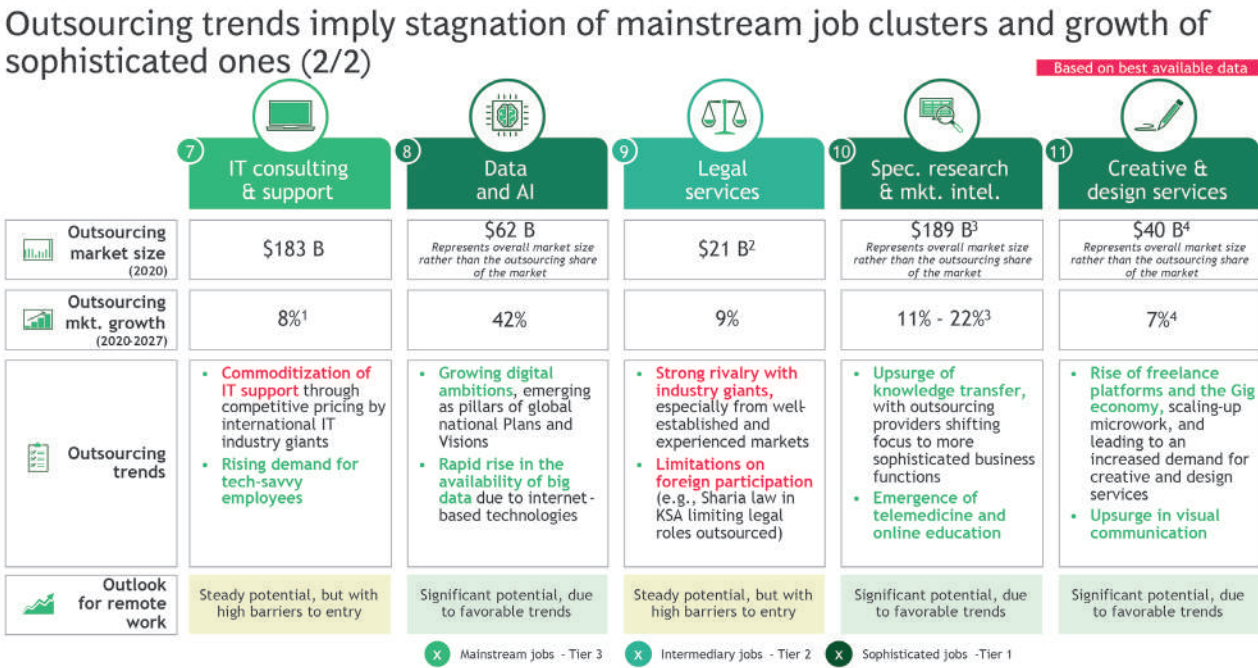
4. Job projections from WEF’s future of work report (specifying jobs projected to have an increase or decrease in demand)

The World Economic Forum’s future of work report indicates that demand for sophisticated jobs is on the rise globally, whereas demand for mainstream jobs is on the decline (Figure 10).

In summary, job clusters were thus categorized based on current outsourcing market size and future outsourcing prospects (Figure 11):

- **Clusters that are currently small in size, but are expected to have significant growth potential.** Data and artificial intelligence (AI), specialized research and market intelligence (Telemedicine and remote education), and creative and design services.

Figure 9 - Job clusters outsourcing trends (2)



Source: 1. CAGR from 2021-2027; 2. Data for 21¹; 3. Includes telemedicine, edtech, and business consulting; 4. Limited to graphic design

Figure 10 - Future trends in demand for jobs

Demand for specific jobs is increasing while decreasing for others, shifting therefore outsourcing needs

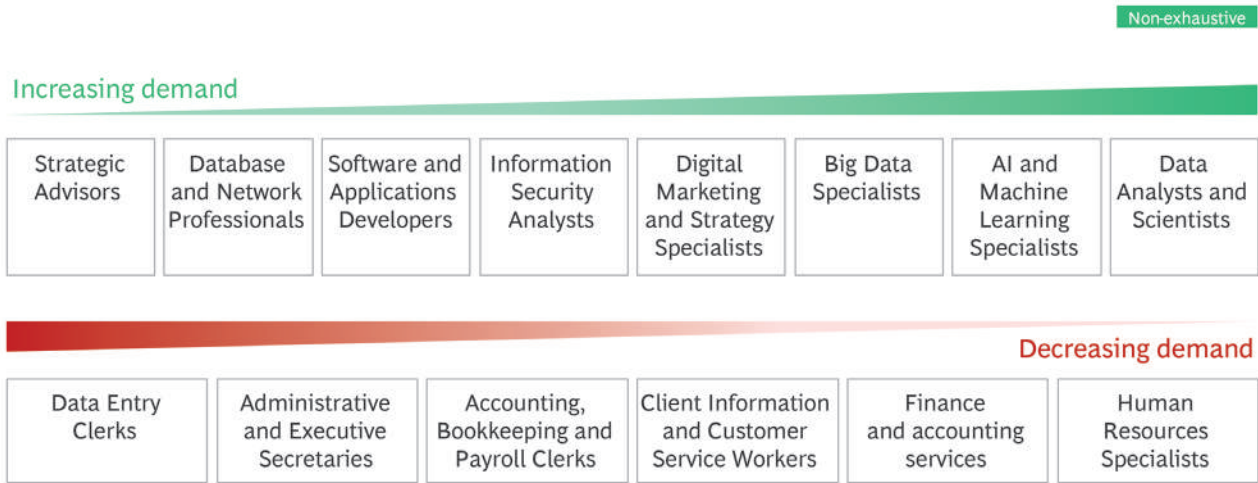
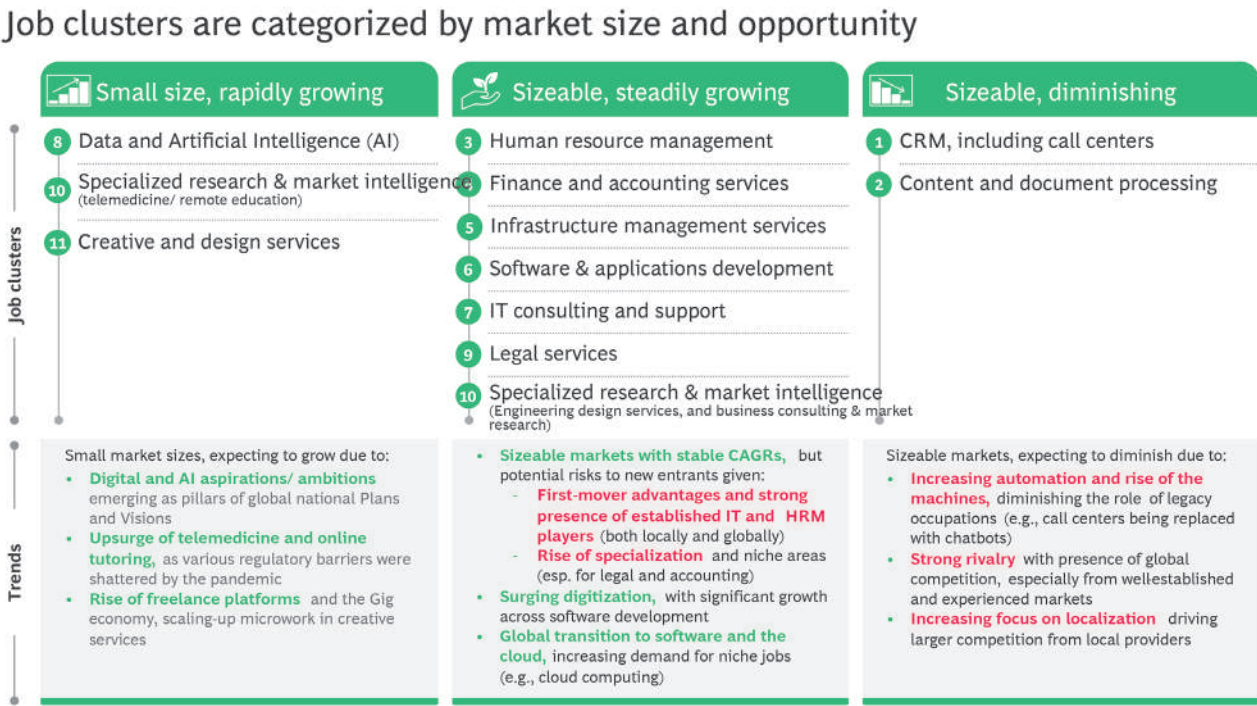


Figure 11 - Job clusters categorization



- Clusters that are currently sizeable and are expected to maintain steady growth. Human resource management, finance and accounting services, software and applications development, Infrastructure management services, IT consulting and support, legal services, and specialized research and market intelligence (business consulting and market research, and engineering design services).
- Clusters that are currently sizeable, but whose growth is expected to diminish. CRM (including call centers), and content and document processing

Deep-dives into six of the demand hot-spots were conducted, to obtain a more nuanced understanding of potential job outsourcing opportunities and the demand for sourcing-in talent from key markets. The selection was based on outsourcing market size, key jobs outsourced, time-zone proximity to focus countries, business languages and fit with focus countries. Six countries or demand

hot-spots were shortlisted: UAE, KSA, Qatar, USA, France, and the UK.

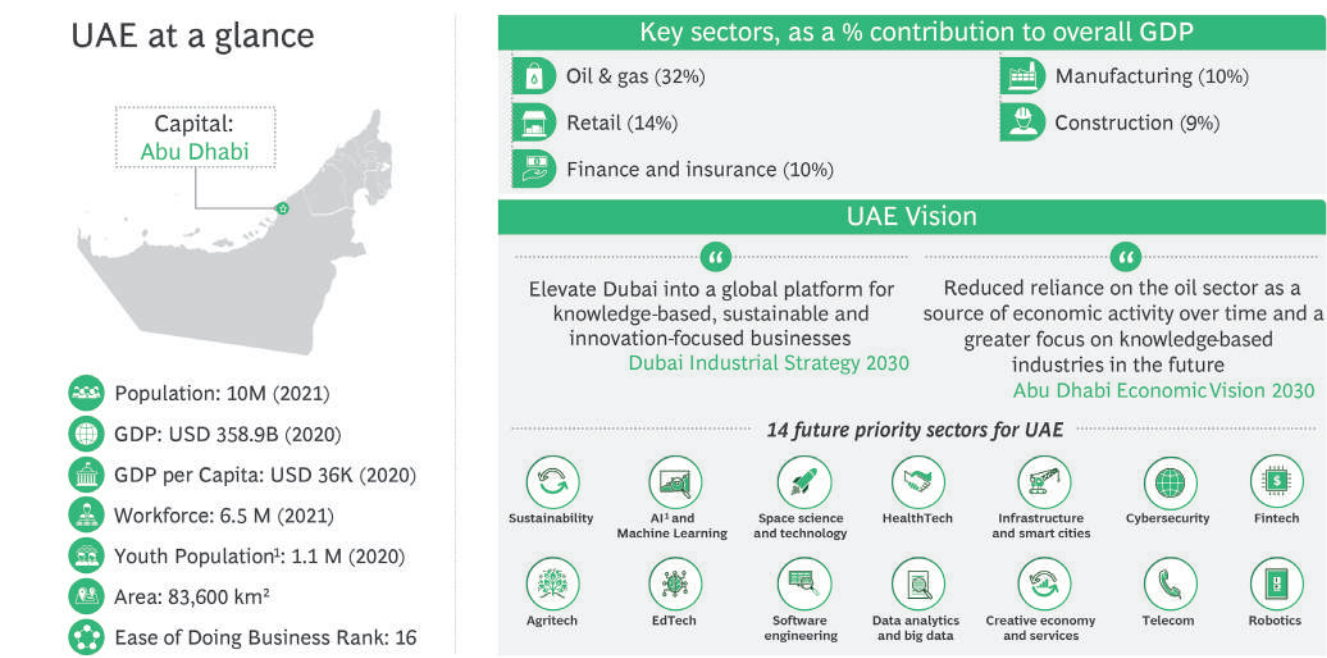
3.3 Deep-dive: UAE outsourcing prospects

The UAE is the second-largest economy in the Arab world, with a gross domestic product (GDP) of ~ USD 360 billion in 2020 (Figure 12). The UAE continues to be a strategic hub, with business-friendly free zones and a quickly growing economy.

3.3.1 JOB OUTSOURCING NEEDS (DEMAND) AND TALENT POOL (SUPPLY)

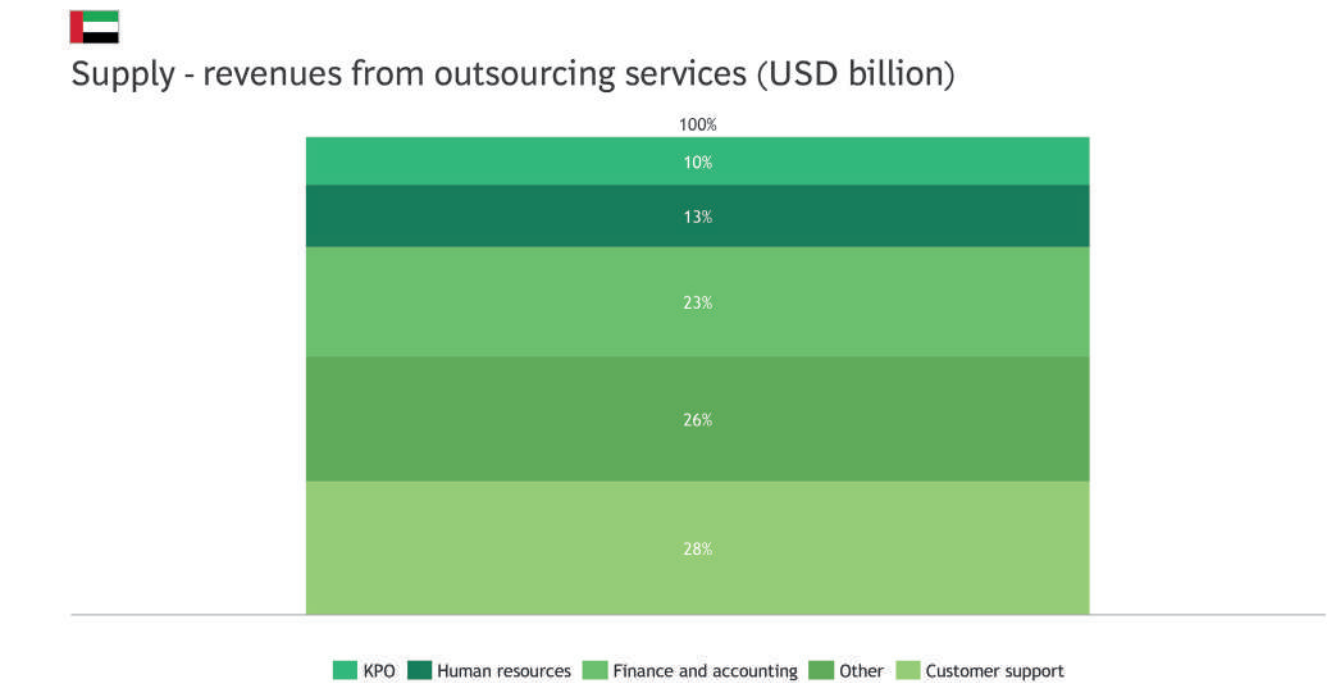
The UAE is one of the largest suppliers of talent in the GCC. Local supply of outsourcing services (i.e., revenues from outsourcing services) in the UAE was estimated at USD 1.3 billion in 2018. Customer support, finance and accounting, human resources, and KPO are the major jobs and job clusters supplied by the UAE (Figure 13).

Figure 12: UAE at a glance



Source: 1. 15-24 years old

Figure 13 - Breakdown of revenues from outsourcing services in the UAE



As part of this supply, Dubai Outsource City (Figure 14) was created to provide an integrated ecosystem for outsourcing services, and help companies connect with external providers of business or back-end services.

However, the UAE is one of the key markets or demand “hot spots” for job outsourcing (i.e., where entities outsource parts of their value chains and source-in talent from third parties). The total spending by UAE-based organiza-

tions on outsourcing services (both from local and offshore providers) was estimated at over USD 4.8 billion in 2018 and is expected to reach USD 6.8 billion in 2023, with a CAGR of ~7% (Figure 15).

The projections imply undersupply by local players and inability to meet local demand. This gap presents a significant opportunity for offshore job outsourcing service providers.

Figure 14 - Dubai Outsource City key highlights



Job clusters that have traditionally been prone to some level of outsourcing in the UAE include IT consulting and support (e.g., DEWA outsourcing IT services), CRM including call centers (e.g., Emirates outsourcing call centers), finance and accounting services, and HRM (Figure 16).

The UAE has embarked on a journey of empowerment and transformation. Its target is to become one of the world’s most resilient, modern, and innovative nations while remaining rooted in its traditions and maintaining and its global status and interconnections. Goals are defined and enabled by various ambitious national strategies (e.g., Ministry of Economy’s promising foreign investment sectors, Ministry of Economy’s promising economic sectors, UAE strategy for AI 2031) as well as targeted forward-looking Emirate-level strategies (e.g., Abu Dhabi Economic Vision 2030, Dubai Industrial Strategy 2030).

The UAE is striving to diversify its economy with its future agenda revolving around emerging themes like “sustainable economic development”, “innovation”, “digital transformation and security”, and “advanced science, technology and artificial intelligence”. Analysis of the UAE’s national and Emirate-level strategies highlight the significance of three job clusters to the UAE’s future economic outlook, which in turn signal strong growth potential for job outsourcing:

- Infrastructure management services (e.g., cloud engineers, cybersecurity analysts, network engineers)
- Software and applications development (e.g., software engineers, application developers)
- Data and AI (e.g., data scientists, blockchain developers)

Figure 15 - Growth in demand for sourcing-in talent

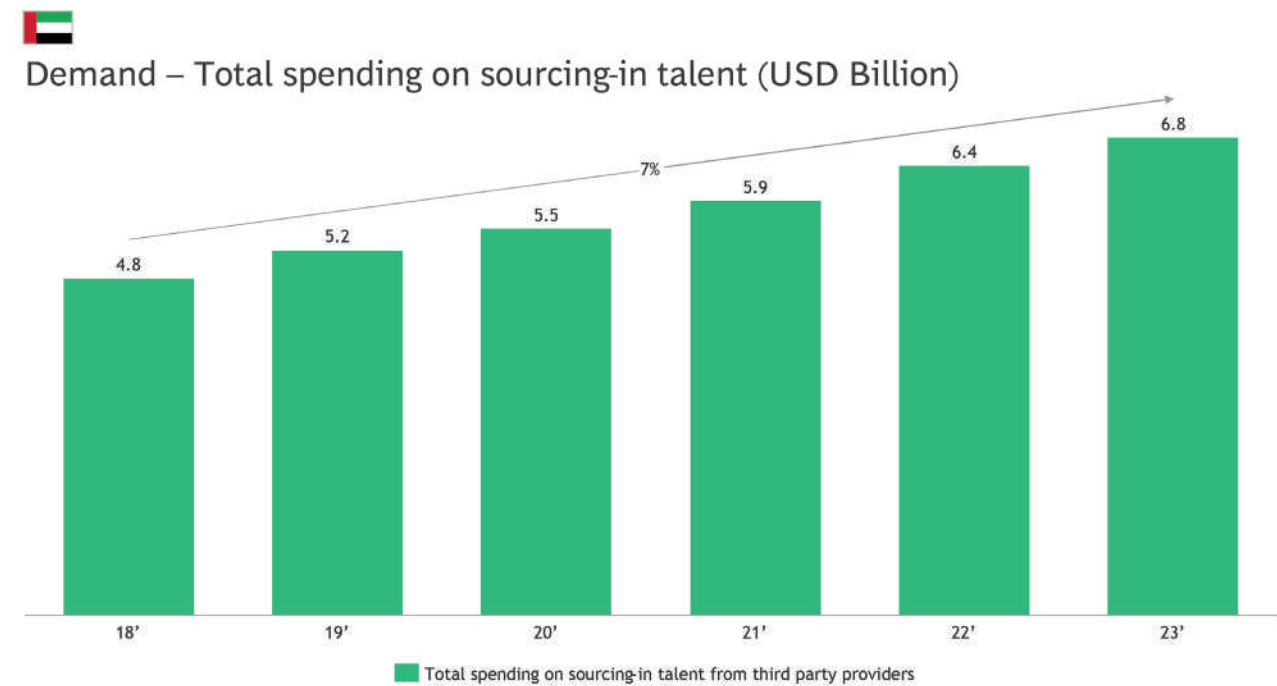


Figure 16 - Breakdown of UAE spending on sourcing-in talent, per cluster

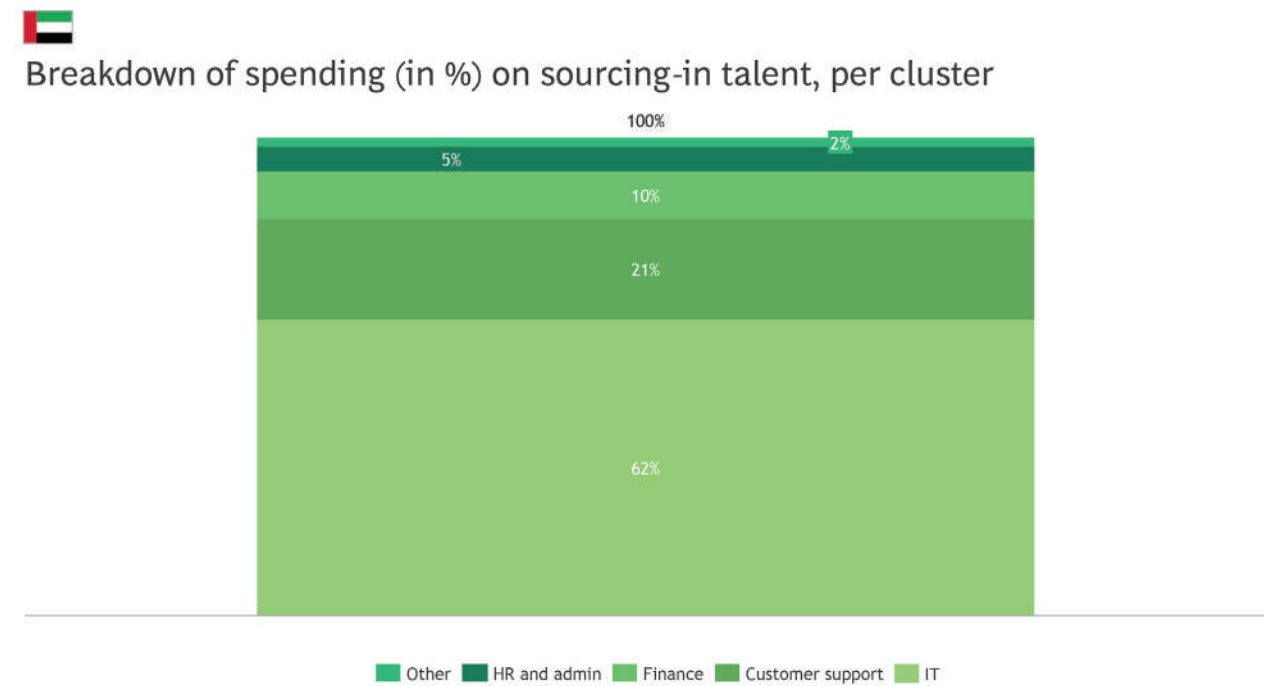
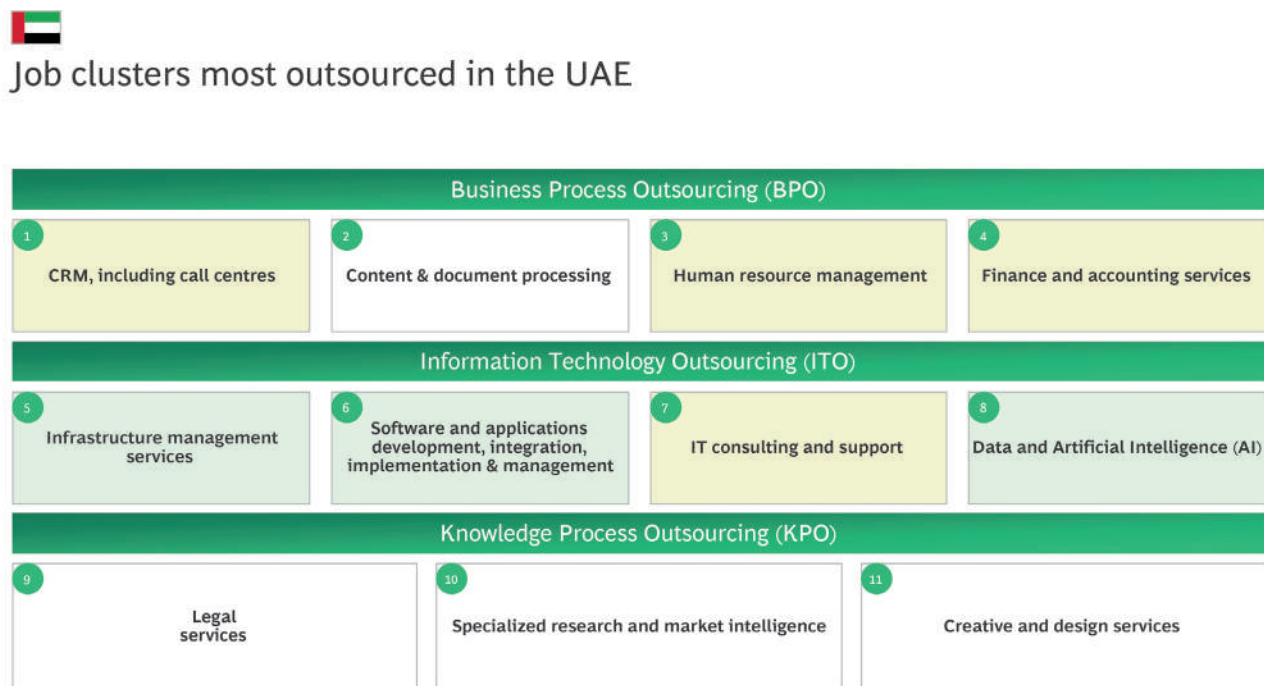


Figure 17 - UAE job clusters outsourcing categorization



Job clusters were categorized as either traditionally outsourced or showing strong outsourcing growth potential (Figure 17).

3.3.2 NOTABLE INDUSTRIES FOR SOURCING-IN TALENT
The most prominent industries when it comes to spending on job outsourcing services and sourcing-in talent are (Figure 18):

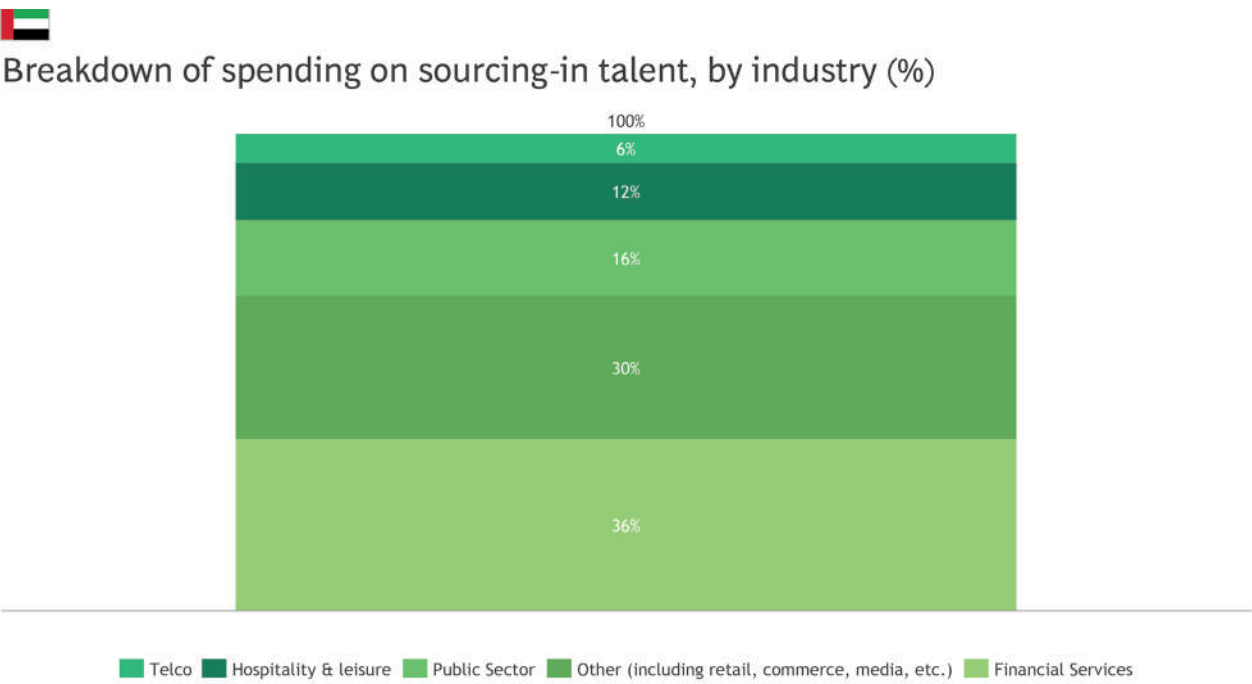
- Financial services
- Public sector (e.g., Dewa outsourcing IT services)
- Hospitality and leisure (e.g., Emirates outsourcing call centers to Australia, UK, US, India, and Pakistan)
- Telecommunications (e.g., Etisalat outsourcing support services).

3.3.3 ORIGIN OF EXISTING SUPPLY AND REQUIREMENTS
Currently, the UAE's talent pool supply for outsourced jobs comes in from local service providers, prominent destinations such as India and neighboring Arab countries for BPO, and the US and European countries for more sophisticated jobs.

3.3.4 POTENTIAL CHALLENGES
However, despite the UAE market being a hot spot for outsourced jobs and presenting opportunities for talent service providers to tap into, there are a few challenges:

- Data residency and protection laws, limiting offshore outsourcing for banking and healthcare industries
- Commoditization of IT support, through local IT outsourcing providers (e.g., Itqan, etc.)

Figure 18 - Breakdown of UAE spending on sourcing-in talent by industry



- Increased competitiveness through local BPO outsourcing providers (e.g., Cupola Group and Tafaseel for call centers, etc.)
- Increased competitiveness through local human resources management outsourcing providers (e.g., Reach employment, Nathan & Nathan, etc.)

3.4 Deep-dive: KSA outsourcing prospects

KSA is the largest economy in the Middle East, with a GDP of ~ USD 840 billion in 2020 (Figure 19). KSA is one the fastest growing economies and its Vision 2030 sets ambitious targets for its economy and people.

3.4.1 JOB OUTSOURCING NEEDS (DEMAND) AND TALENT POOL (SUPPLY)

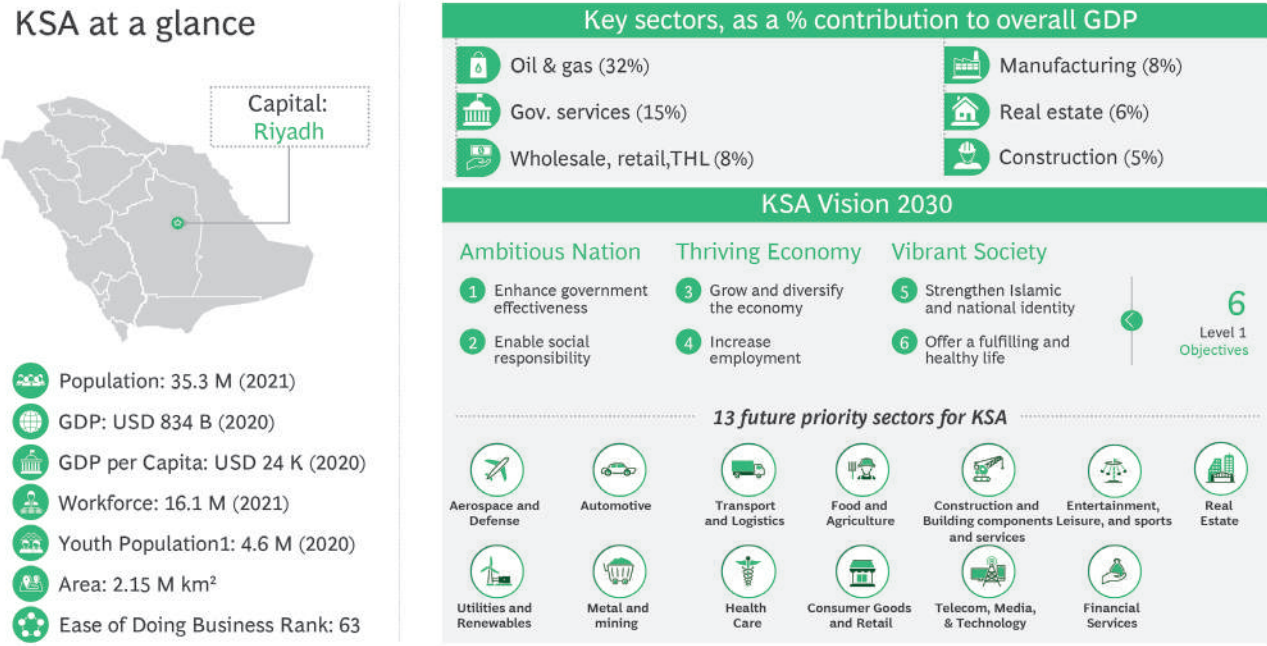
KSA is the second largest supplier of talent in the GCC. Local supply of outsourcing services (i.e., revenues from outsourcing services) in KSA was estimated at USD 1 billion in 2018.

However, KSA is one of the key demand “hot spots” for job outsourcing. The total spending by KSA-based organizations on outsourcing services (both from local and offshore service providers) was estimated at over USD 2.3 billion in 2018 and is expected to reach USD 5.7 billion in 2027, with a CAGR of ~10% (Figure 20).

Drivers of the high number of jobs outsourced and the demand for sourcing-in talent to KSA include:

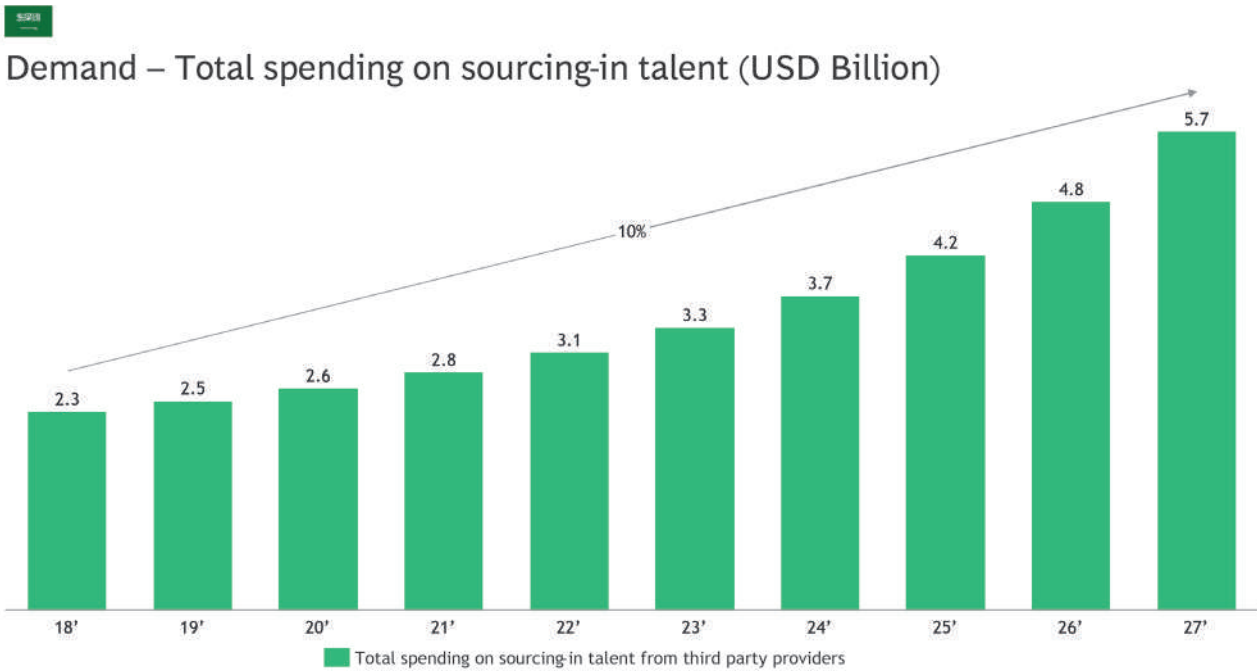
- Stringent governmental rules, restricting the flow of foreign manpower to the Kingdom, and creating offshore outsourcing opportunities
- Increased ICT spending, driving up the number of IT companies, and benefiting the outsourcing industry
- Rise of ambitious real estate and infrastructure developments, including Royal Commissions, SEZs, megaprojects, plausibly leading to talent shortages and creating outsourcing opportunities

Figure 19 - KSA at a glance



Source: 1. 15-24 years old; Source: World Bank, Vision 2030, Vision Realization Programs, PIF strategy, GaStat, BCG analysis

Figure 20 - Growth in demand for sourcing-in talent



The projections imply undersupply by local players and inability to meet local demand. This demand-supply gap presents a significant opportunity for offshore job outsourcing service providers.

Job clusters that have traditionally been prone to some level of outsourcing in KSA include finance and accounting services, HRM (e.g., STC outsourcing HRM), and specialized research and market intelligence (e.g., ministries outsourcing consulting services). However, other job clusters present limited outsourcing opportunities such as IT consulting and support, and CRM including call centers. Furthermore, competition to offer BPO services is increasing, due to large local and international service providers.

KSA is striving to become a pioneering and successful global model of excellence on all fronts. Saudi Arabia is determined to both reinforce and diversify its economic capabilities, turning key strengths into enabling tools for a fully diversified future. It has set ambitious yet achievable targets, which express long-term goals and expectations and reflect the country’s strengths and capabilities. The Nation’s targets are enabled by ambitious national strategies (e.g., Vision 2030, 11 Vision Realization Programs) and

by large-scale transformation projects (e.g., Giga projects like NEOM, Qiddiya, and Diriyah Gate). KSA’s future agenda prioritizes themes of “digital transformation”, “information security”, “culture and entertainment”, “environmental sustainability” and “technology and artificial intelligence”. Analysis of KSA’s national strategies identifies four job clusters to of particular significance to KSA’s future economic outlook, and indicating strong growth potential for job outsourcing:

- Infrastructure management services (e.g., cloud engineers)
- Software and applications development (e.g., process automation specialists)
- Data and AI
- Creative and design services (e.g., digital media specialists)

Job clusters were categorized as either traditionally outsourced or showing strong outsourcing growth potential (Figure 21).

Figure 21 - KSA job clusters outsourcing categorization

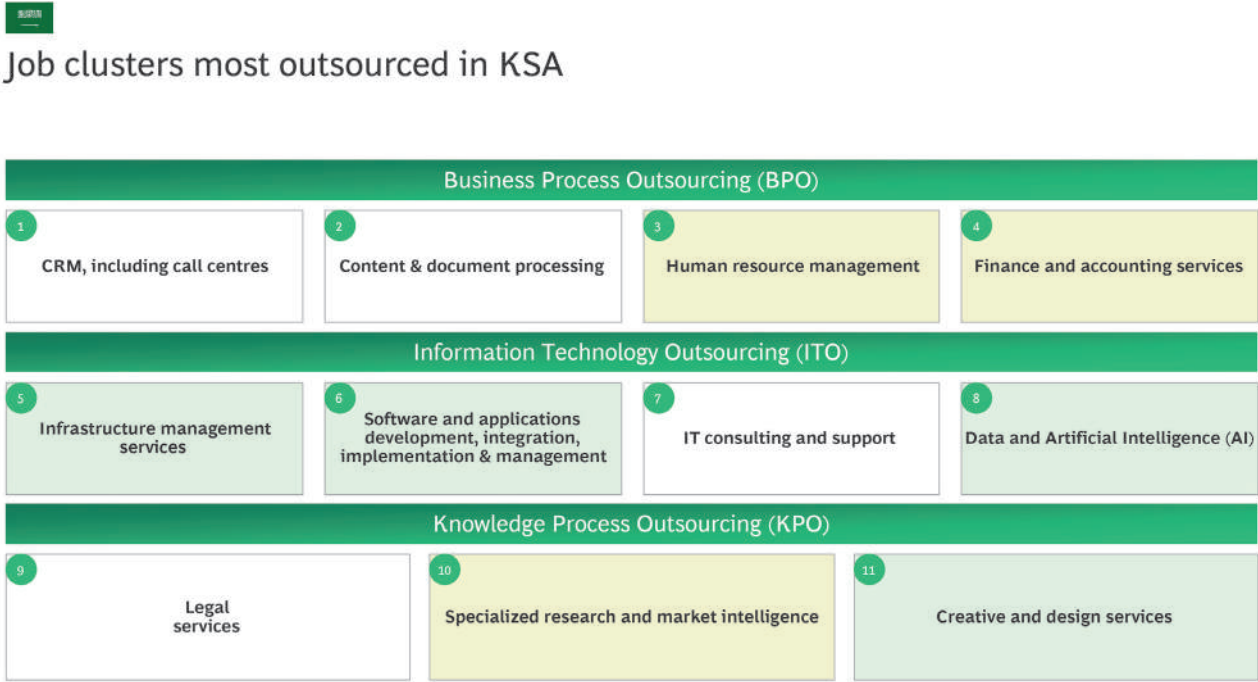
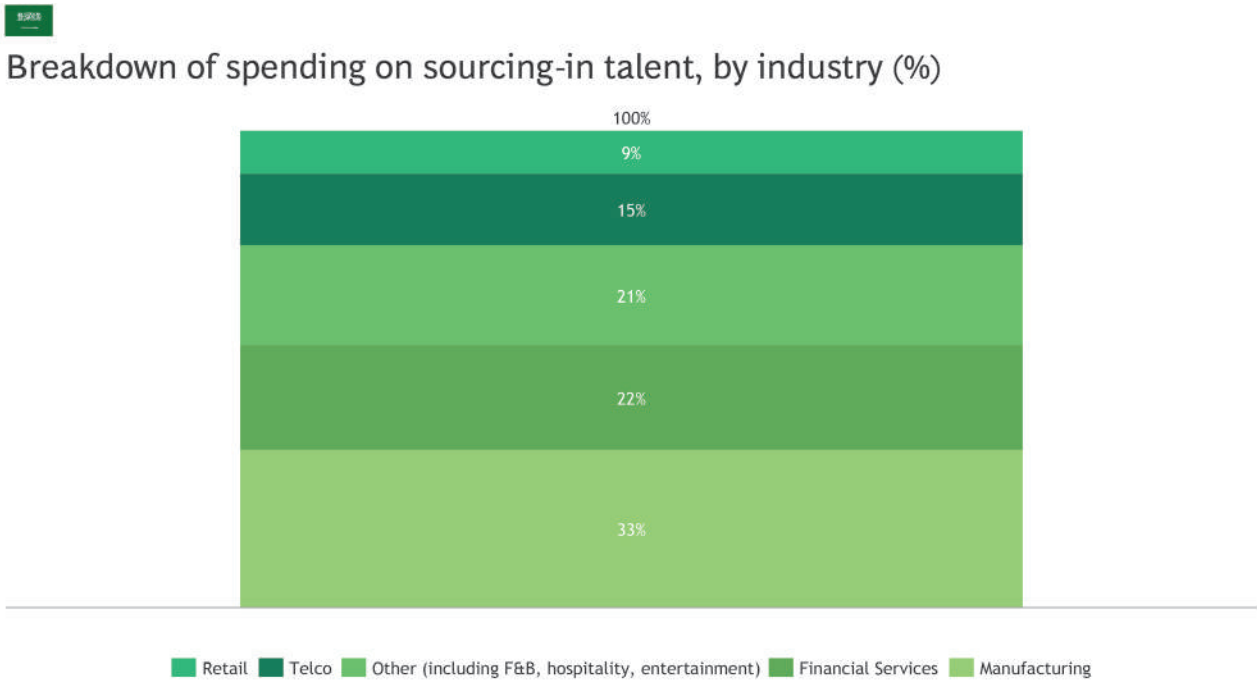


Figure 22 - Breakdown of KSA spending on sourcing-in talent by industry



3.4.2 NOTABLE INDUSTRIES FOR SOURCING-IN TALENT

The most prominent industries when it comes to spending on job outsourcing services and sourcing-in talent include (Figure 22):

- Financial services
- Manufacturing
- Telecommunications (e.g., STC outsourcing human resources services, Mobily outsourcing IT support)

3.4.3 ORIGIN OF EXISTING SUPPLY AND REQUIREMENTS

The reliance on outsourcing for cost reduction is less popular in KSA due to Saudization, an employment policy implemented solely to boost Saudi employment.

Currently, KSA’s talent pool supply for outsourced jobs comes mainly from local service providers, India and neighboring Arab countries (e.g., Egypt) for BPO, and the US, China, and European countries for more sophisticated jobs.

3.4.4 POTENTIAL CHALLENGES

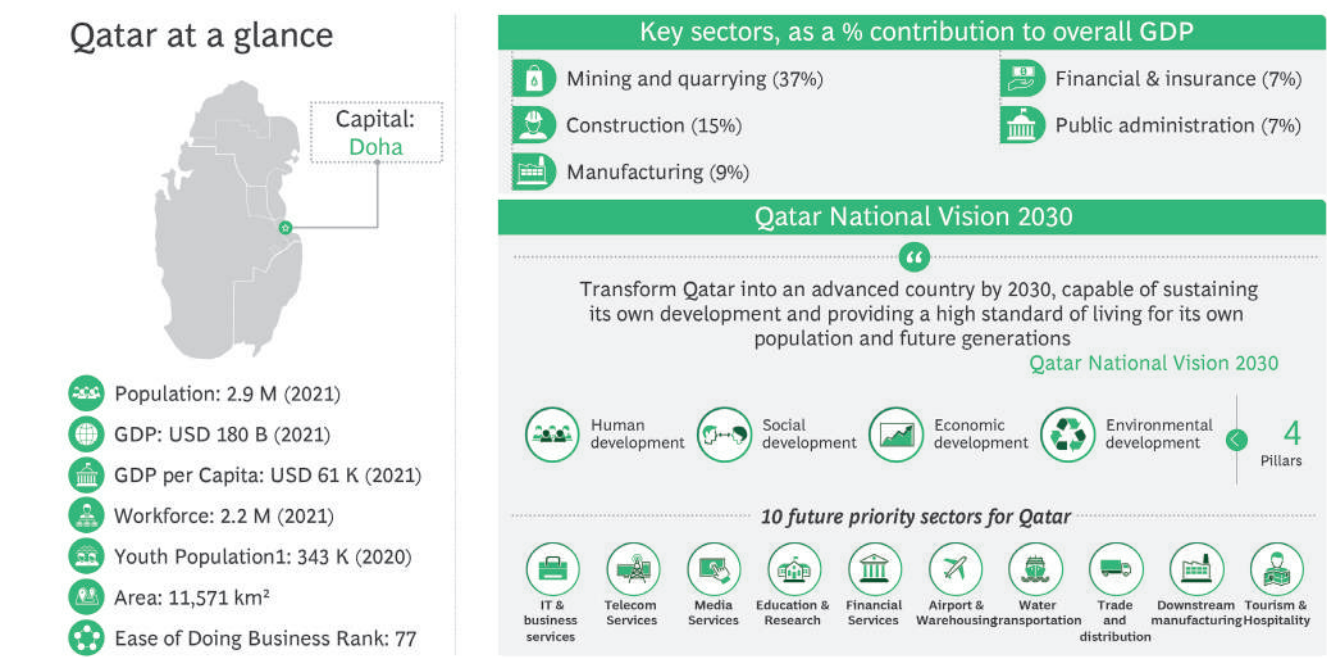
However, despite the Saudi market being a key demand hot spot and presenting opportunities for talent service providers, there are a few challenges:

- Offshore restrictions for select job clusters (e.g., call centers), requiring employees to be based in KSA
- Legacy industries favoring local or international players with business registry in the country (e.g., accounting services, human resources management)
- Data residency and protection laws, limiting offshore outsourcing for the public and healthcare sectors

3.5 Deep-dive: Qatar outsourcing prospects

Qatar is the third largest GCC economy, with a GDP of ~ USD 180 billion in 2020 (Figure 23). Qatar’s national ambition is to transform into an advanced economy, sustaining its development, and providing a high standard of living for its people.

Figure 23 -: Qatar at a glance



Source: 1. 15-24 years old; Source: World Bank, Qatar Second National Development Strategy, BCG analysis

3.5.1 JOB OUTSOURCING NEEDS (DEMAND) AND TALENT POOL (SUPPLY)

Qatar is a supplier of talent, with local supply of outsourcing services (i.e., revenues from outsourcing services) estimated at USD 420 million in 2018.

However, Qatar is one of the key markets or demand “hot spots” for job outsourcing. The total spending by Qatari-based organizations on outsourcing services (both from local and offshore service providers) was estimated at ~ USD 690 million in 2021 and is expected to reach ~ USD 1.2 billion in 2027, with a compounded annual growth rate (CAGR) of ~9% (Figure 24).

Drivers of the high number of jobs outsourced and the demand for sourcing-in talent to Qatar include:

- Significant skills mismatch between supply and demand, with the labor force concentrated in low-skilled occupations, creating offshore outsourcing opportunities
- Diversification plans driving ambitious real estate and infrastructure developments, plausibly leading to talent shortages, and creating outsourcing opportunities

The projections imply undersupply by local players and inability to meet local demand. This demand-supply gap presents a significant opportunity for offshore job outsourcing service providers.

Job clusters that have traditionally been prone to some level of outsourcing in Qatar include IT consulting and support (e.g., QatarEnergy outsourcing IT services), finance and accounting services, HRM (e.g., Ooredoo outsourcing HRM), and specialized research and market intelligence. However, competition to offer BPO and IT support services is increasing, with multiple large international service providers.

Qatar has embarked on a change journey and aims to transform the country into an advanced economy, capable of sustaining its own development and ensuring high living standards for upcoming generations. The Nation’s targets are defined and enabled through ambitious national strategies (e.g., First National Development Strategy 2011-2016, Second National Development Strategy 2018-2022). Qatar is seeking to develop a diversified economy, diminish dependence on hydrocarbons, invest in the knowledge-based economy, and nurture the growing private sector. Key

themes in its future agenda include “sustainable economic development”, “cloud computing”, “big data analytics”, “Internet of Things”, and “smart cities”. Analysis of Qatar’s national strategies highlights the significance of four job clusters to Qatar’s future economic outlook, which yield strong growth potential for job outsourcing:

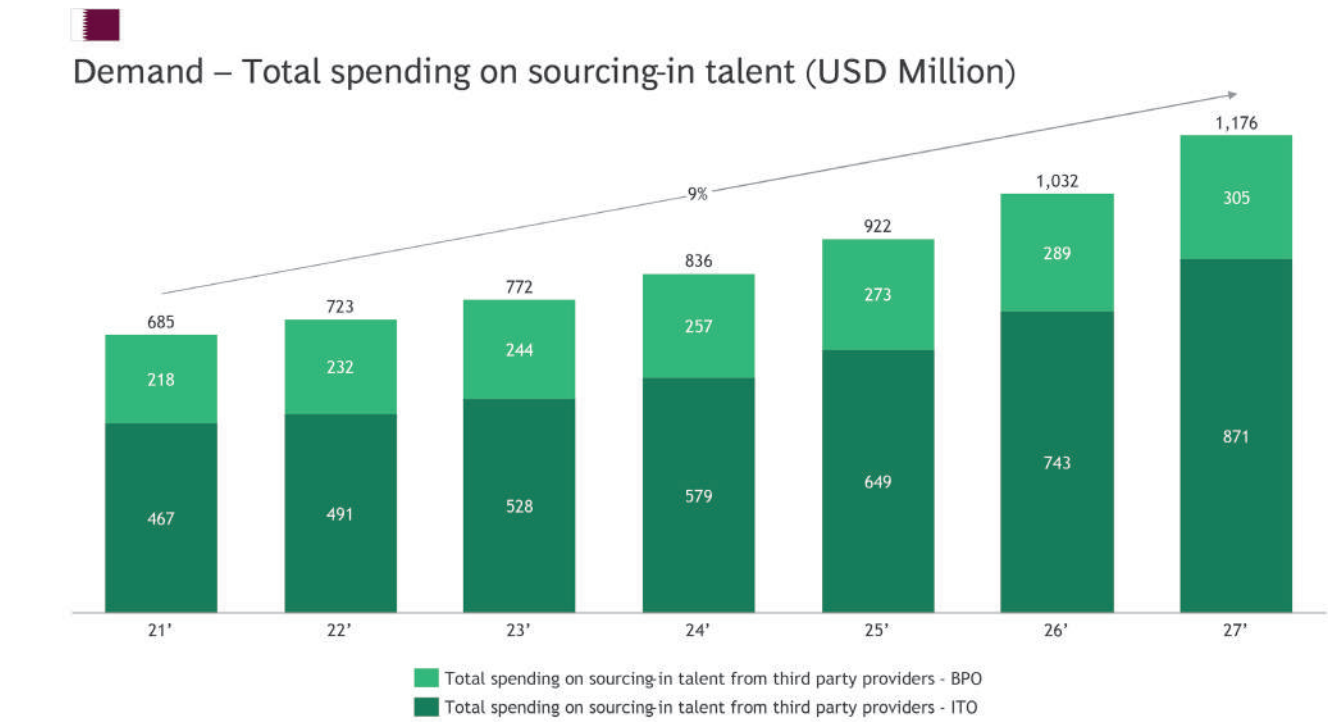
- Infrastructure management services (e.g., cloud engineers)
- Software and applications development (e.g., software engineers)

- Data and AI (e.g., Blockchain developers, big data analysts, and AI specialists)
- Creative and design services (e.g., marketing specialists)

Job clusters were categorized as either traditionally outsourced or showing strong outsourcing growth potential (Figure 25).

3.5.2 NOTABLE INDUSTRIES FOR SOURCING-IN TALENT
The most prominent industries currently spending on job outsourcing services and sourcing-in talent include:

Figure 24 - Growth in demand for sourcing-in talent

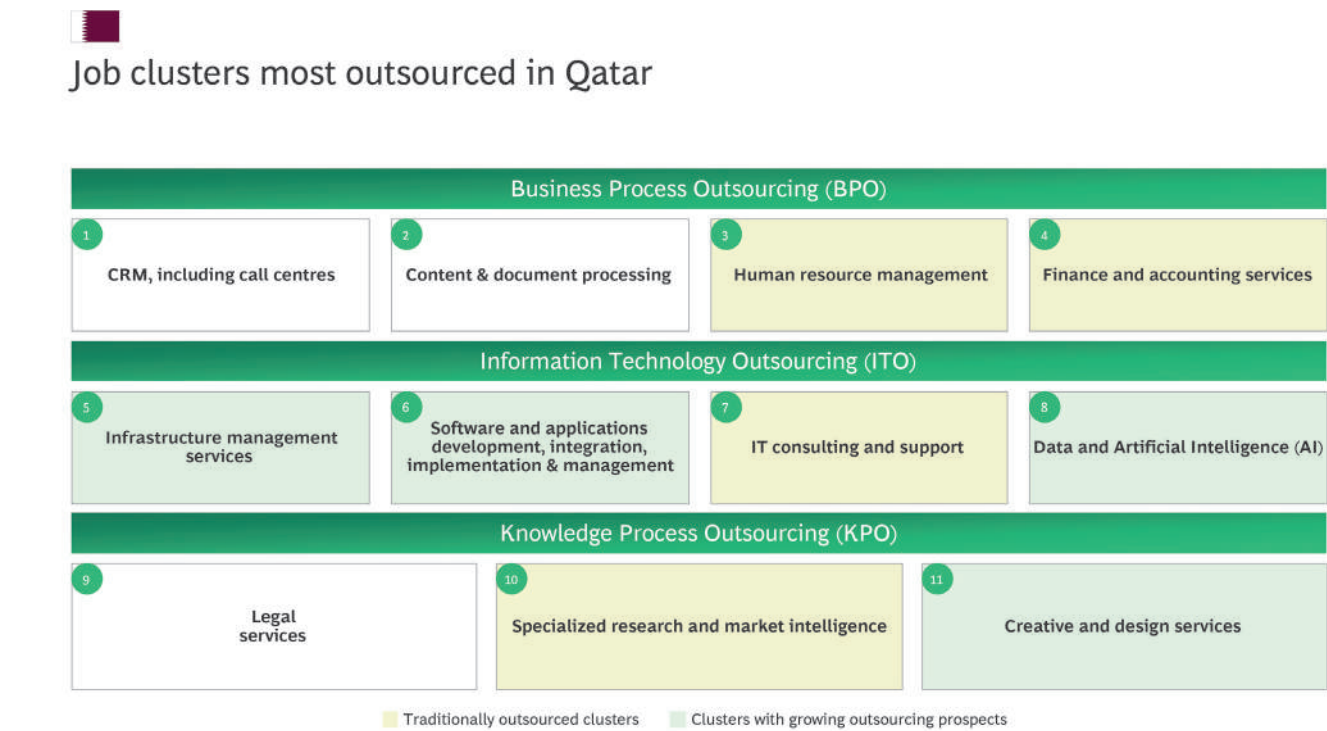


- Public sector, specifically with the roll-out of government initiatives in the form of “Digital Government Strategies”
- Tourism industry (e.g., Qatar Airways outsourcing software development)
- Telecommunications (e.g., Ooredoo outsourcing call centers and human resources to a local player)

- Oil and gas industry (e.g., QatarEnergy outsourcing IT services)

3.5.3 ORIGIN OF EXISTING SUPPLY AND REQUIREMENTS
Currently, Qatar’s talent pool supply for outsourced jobs comes mainly from local service providers (e.g., multiple call centers established in Qatar), India and neighboring Arab countries for BPO and some KPO functions (e.g., engineering design outsourced to Egypt), and the US, Far East, and Western Europe for more sophisticated jobs.

Figure 25 - Qatar job clusters outsourcing categorization



3.5.4 POTENTIAL CHALLENGES

However, despite the Qatari market being a key demand hot spot and presenting opportunities for talent service providers, there are some challenges:

- Data residency and protection laws, limiting offshore outsourcing for the public and healthcare sectors
- Lack of familiarity with offshoring services for less sophisticated jobs (e.g., human resources management)
- Strong competition from established international outsourcing hubs (e.g., India for IT support services)

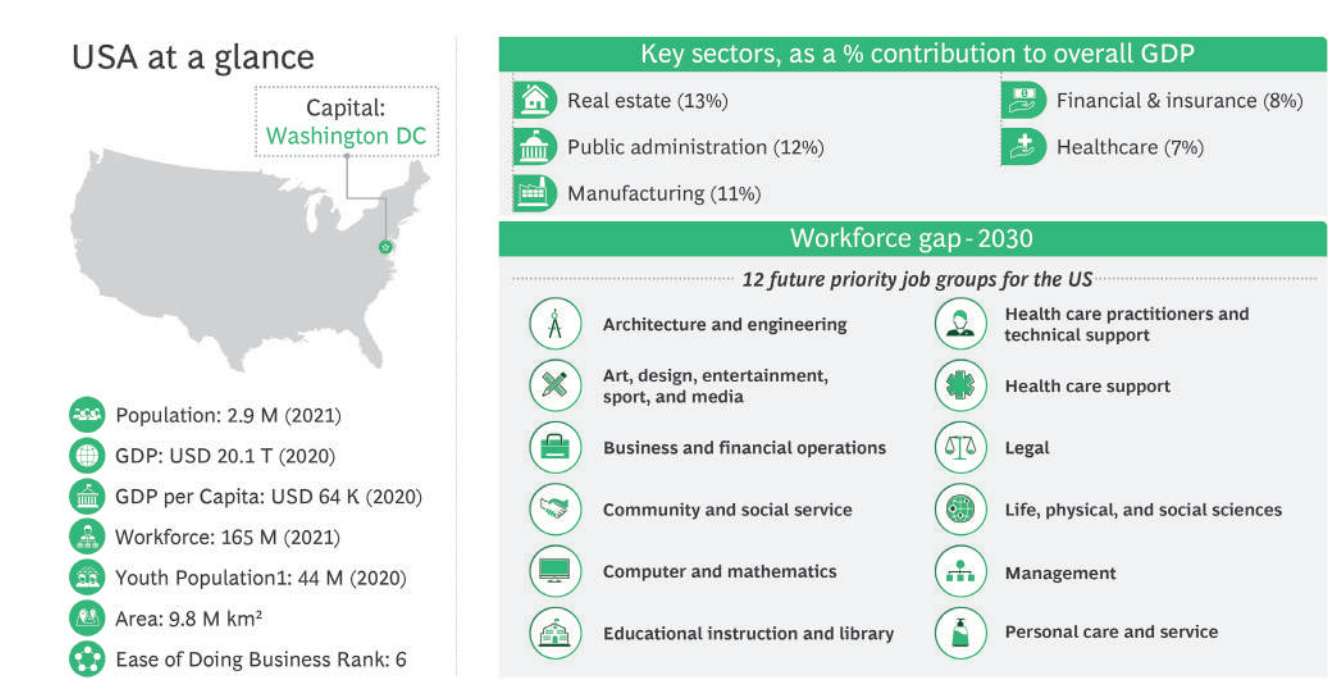
3.6 Deep-dive: USA outsourcing prospects

The USA is the largest economy worldwide, with a GDP of ~ USD 20 trillion in 2020 (Figure 26). The USA economy is dominated by service-oriented companies and hosts more than a fifth of the Fortune Global 500 companies.

3.6.1 JOB OUTSOURCING NEEDS (DEMAND) AND TALENT POOL (SUPPLY)

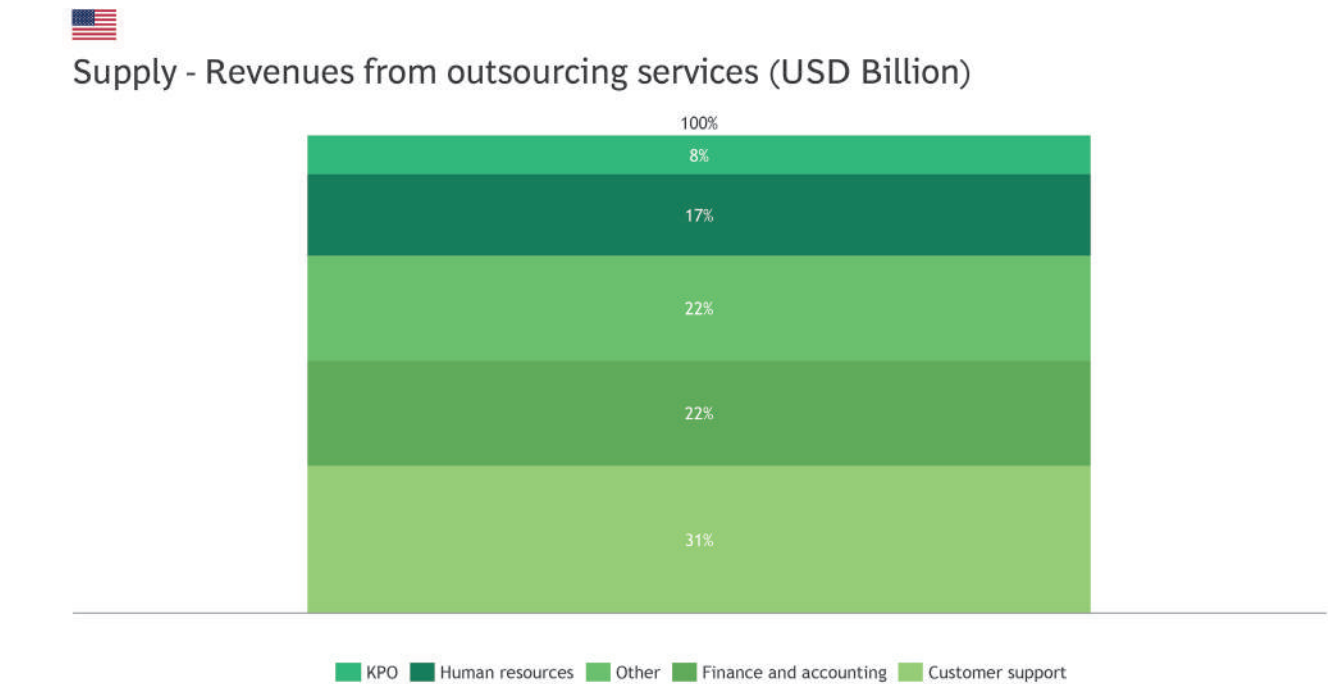
The USA is one of the largest suppliers of talent. Local supply of outsourcing services (i.e., revenues from outsourcing services) was estimated at USD 63 billion in 2020. Customer support, finance and accounting, human resources, and KPO are the most notable jobs and job clusters supplied by the USA (Figure 27).

Figure 26: USA at a glance



Source: 1. 15-24 years old; Source: World Bank, FRED, Faethm, BCG analysis

Figure 27: Breakdown of revenues from outsourcing services in the USA



However, the USA is also one of the key demand “hot spots” for job outsourcing. Total spending by US-based organizations on outsourcing services (both from local and offshore service providers) was estimated at over USD 79 billion in 2020 and is expected to reach USD 100 billion in 2025, with a compounded annual growth rate (CAGR) of ~5% (Figure 28).

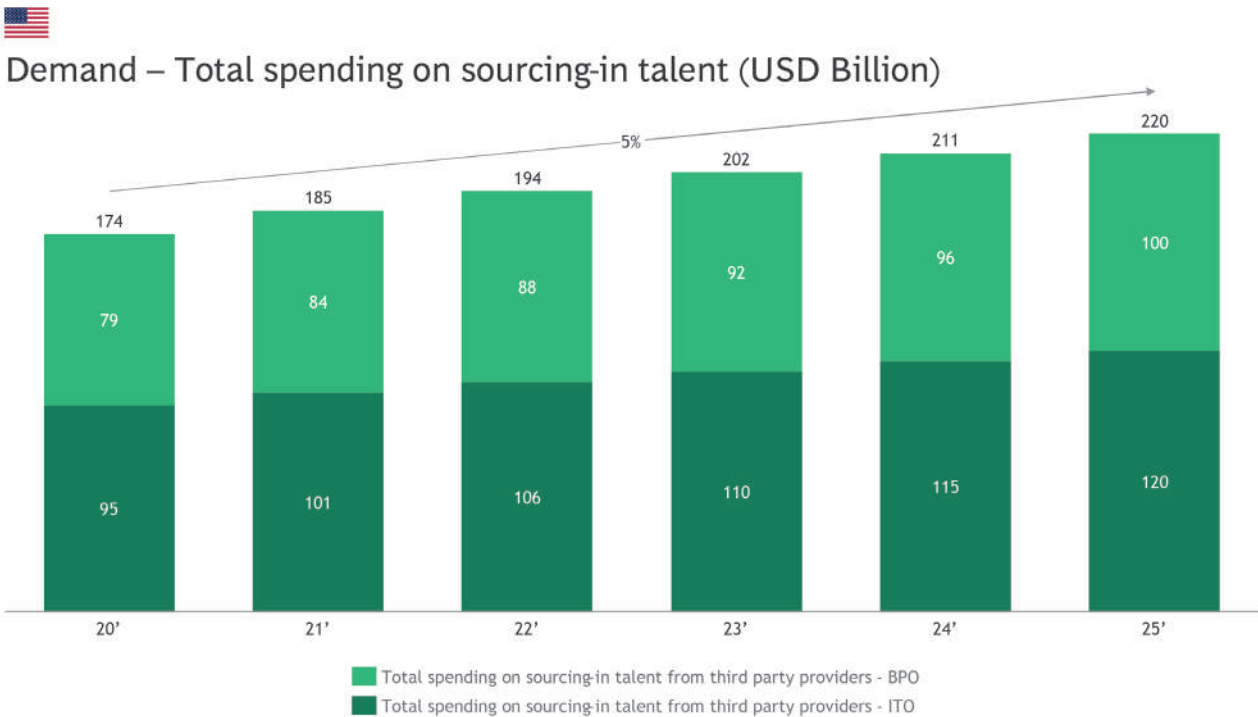
The projections imply undersupply by local players and inability to meet local demand. This demand-supply gap presents a significant opportunity for offshore job outsourcing service providers.

Job clusters that have traditionally been prone to some level of outsourcing in the USA include IT consulting and support, software and application development (e.g., Oracle outsourcing software development), CRM including call centers (e.g., AT&T outsourcing customer service), finance and accounting services, and HRM (Figure 29).

The USA is a highly developed country. Its economy accounts for approximately a quarter of the global GDP and is considered the most technologically powerful and innovative in the world. Its firms are recognized as leaders in technological advances, including artificial intelligence, and computing. Analysis of USA’s future of work studies reveals the significance of four job clusters to the USA’s future economic outlook, which promise strong growth potential for job outsourcing:

- Infrastructure management services (e.g., computation and mathematics)
- Legal services (e.g., legal specialists)
- Data and AI (e.g., data analysts)
- Creative and design services (e.g., arts, design, and entertainment)

Figure 28 - Growth in demand for sourcing-in talent



Job clusters were categorized as either traditionally outsourced or showing strong outsourcing growth potential (Figure 30).

3.6.2 NOTABLE INDUSTRIES FOR SOURCING-IN TALENT
The most prominent industries when it comes to spending on job outsourcing services and sourcing-in talent include:

Figure 29 - Breakdown of US spending on sourcing-in talent, per cluster

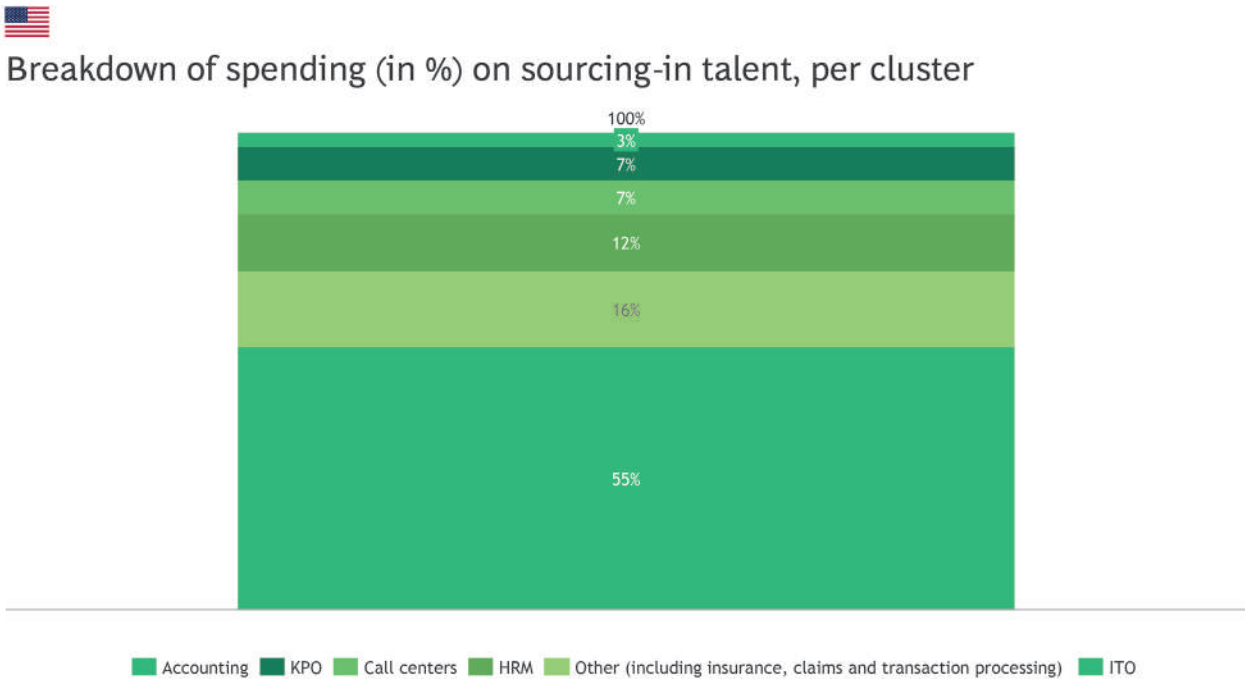
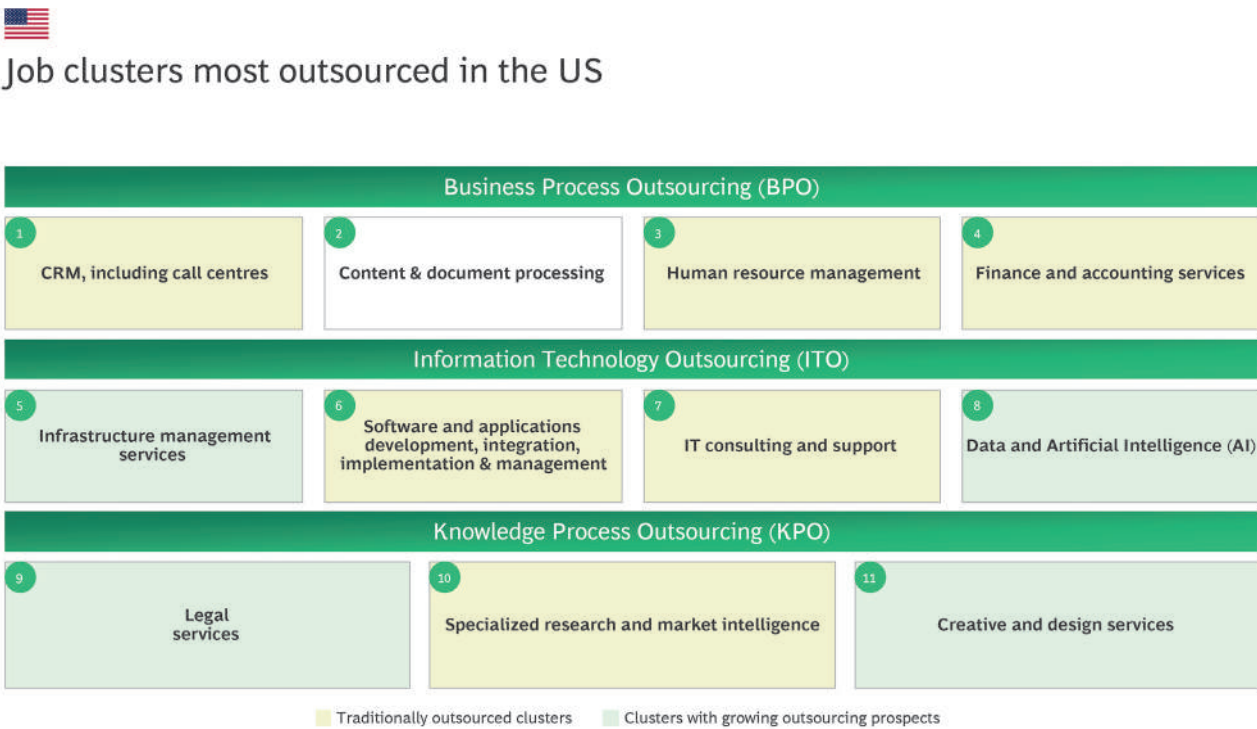


Figure 30 - USA job clusters outsourcing categorization



- Financial services (e.g., Citi outsourcing technology operations to Poland, India, and the Philippines; Amex outsourcing customer support to the Philippines; Wells Fargo outsourcing customer support, payroll analysts, accountants to the Philippines)
- Telecommunications (e.g., AT&T outsourcing customer service and technical support to the Philippines)
- Information and communications technology (e.g., Oracle outsourcing software development to India; Cisco outsourcing IT operations to India; Skype outsourcing software development to Estonia)

3.6.3 ORIGIN OF EXISTING SUPPLY AND REQUIREMENTS

Currently, the United States' talent pool supply for outsourced jobs comes mainly from India, Mexico, and the Philippines for BPO, and India, China, and Eastern Europe for ITO.

3.7 Deep-dive: France outsourcing prospects

France is a global economic powerhouse, with a GDP of ~ USD 2.6 trillion in 2020 (Figure 31). Its "France 2030" vision supports the transformation of sectors of excellence in the French economy.

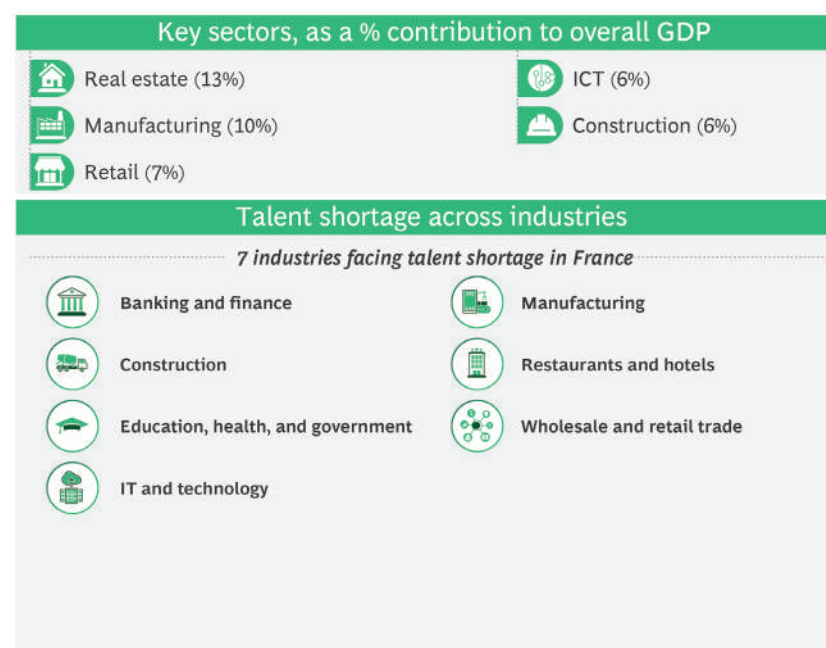
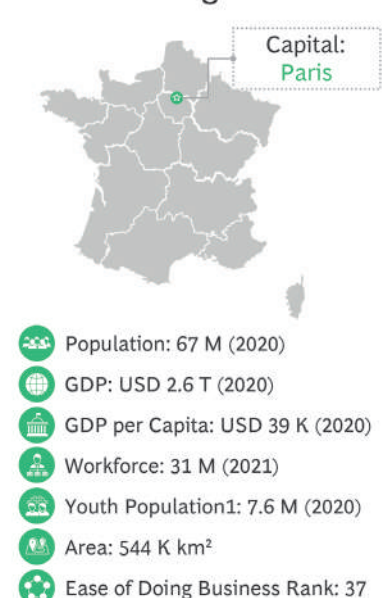
3.7.1 JOB OUTSOURCING NEEDS (DEMAND) AND TALENT POOL (SUPPLY)

France is one of the world's largest suppliers of talent. Local supply of outsourcing services (i.e., revenues from outsourcing services) was estimated at USD 7.6 billion in 2020. Customer support, finance and accounting, human resources, and KPO are the most notable jobs and job clusters supplied by France (Figure 32).

However, France is one of the key markets or "hot spots" for demand for job outsourcing. The total spending by French-based organizations on outsourcing services (both from local and offshore service providers) is estimated at ~

Figure 31 - France at a glance

France at a glance

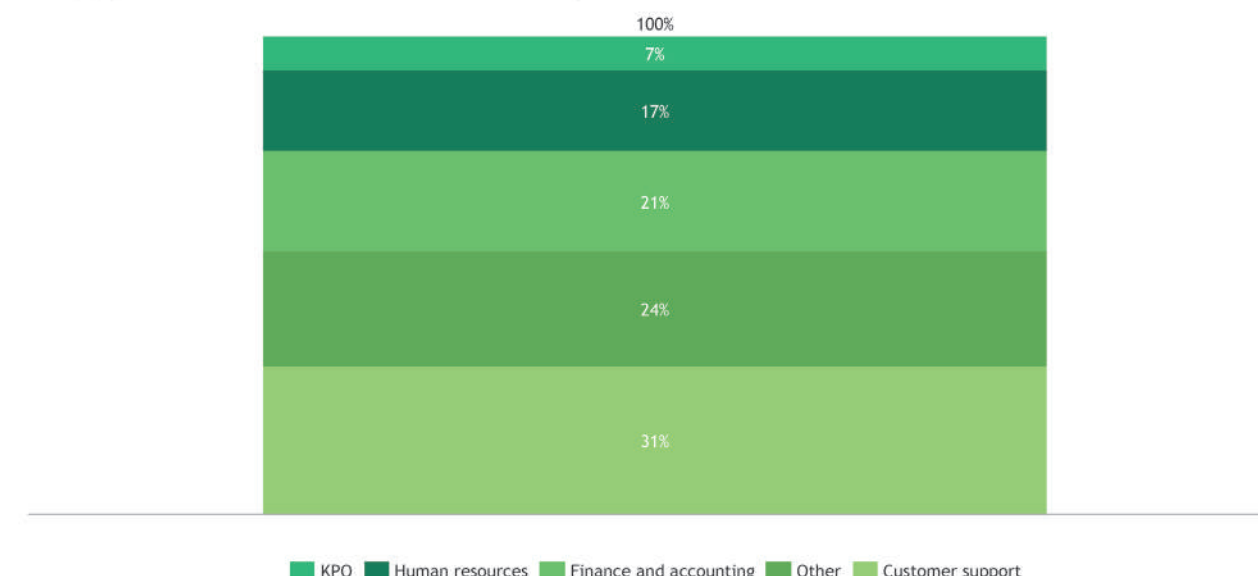


Source: 1. 15-24 years old; Source: World Bank, Manpower Group, BCG analysis

Figure 32 - Breakdown of revenues from outsourcing services in France



Supply - Revenues from outsourcing services (USD Billion)



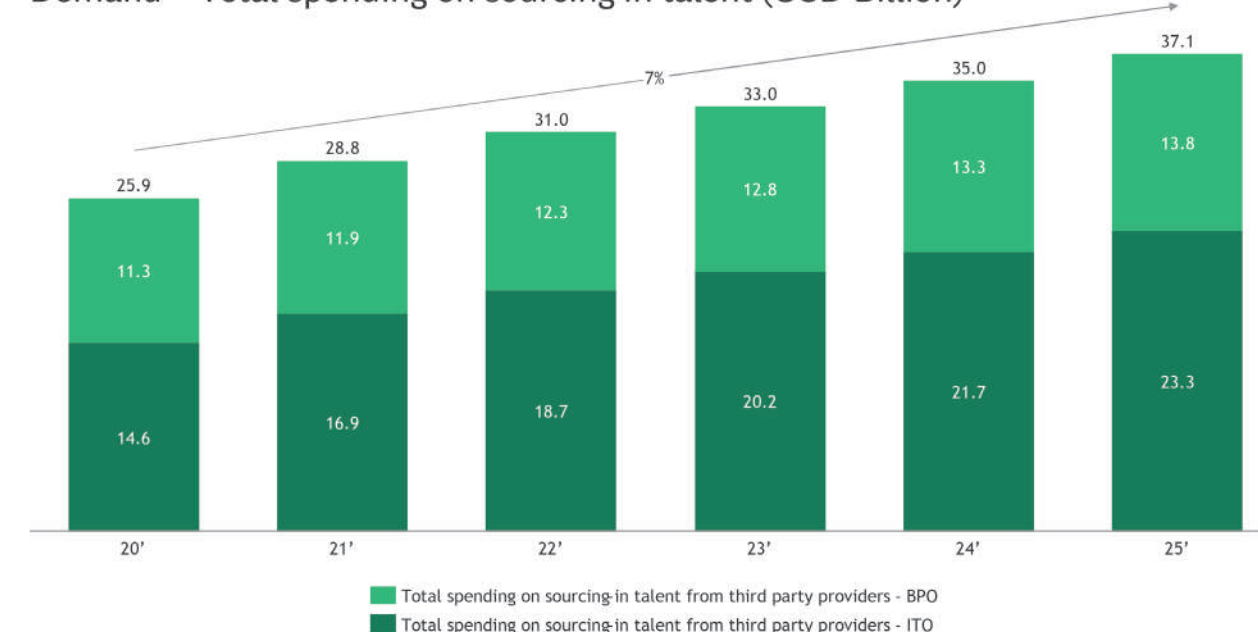
USD 26 billion in 2020 and is expected to reach ~ USD 37 billion in 2025, with a compounded annual growth rate (CAGR) of ~7% (Figure 33).

The projections imply undersupply by local players and inability to meet local demand. This demand-supply gap presents a significant opportunity for offshore job outsourcing service providers.

Figure 33 - Growth in demand for sourcing-in talent



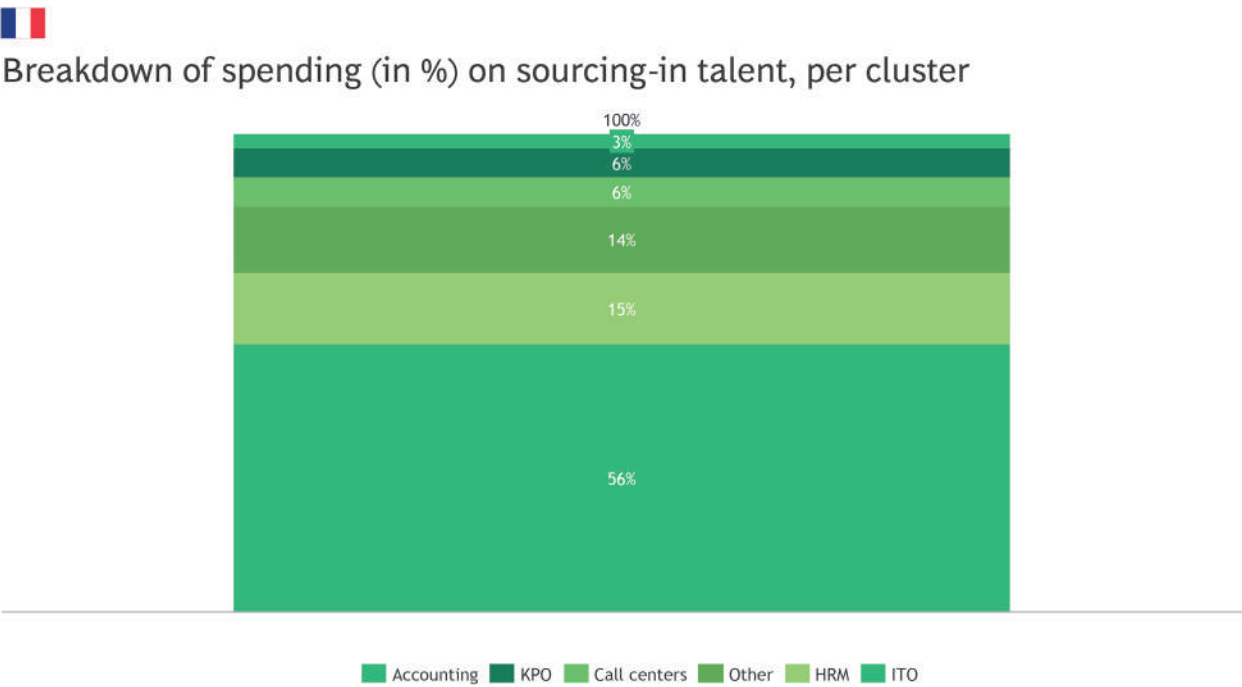
Demand – Total spending on sourcing-in talent (USD Billion)



Job clusters that have traditionally been prone to some level of outsourcing in France include IT consulting and support (e.g., Société Générale outsourcing IT services), software and application development, CRM including call centers (e.g., Orange outsourcing call centers), finance and accounting services, and HRM (Figure 34).

France is a developed economy and a leading member of the European Union. It has set ambitious programs to support the transformation of its economic sectors of excellence. Faced with ecological transition challenges, France has announced the “France 2030” plan and a strategy for “Industrial and Deep Tech Start-Ups” acceler-

Figure 34 - Breakdown of France spending on sourcing-in talent, per cluster



ating sustainable development. Analysis of France’s future of work studies highlights the significance of Data and AI (e.g., big data analysts) as a job cluster central to France’s future economic outlook and suggesting strong growth potential for job outsourcing.

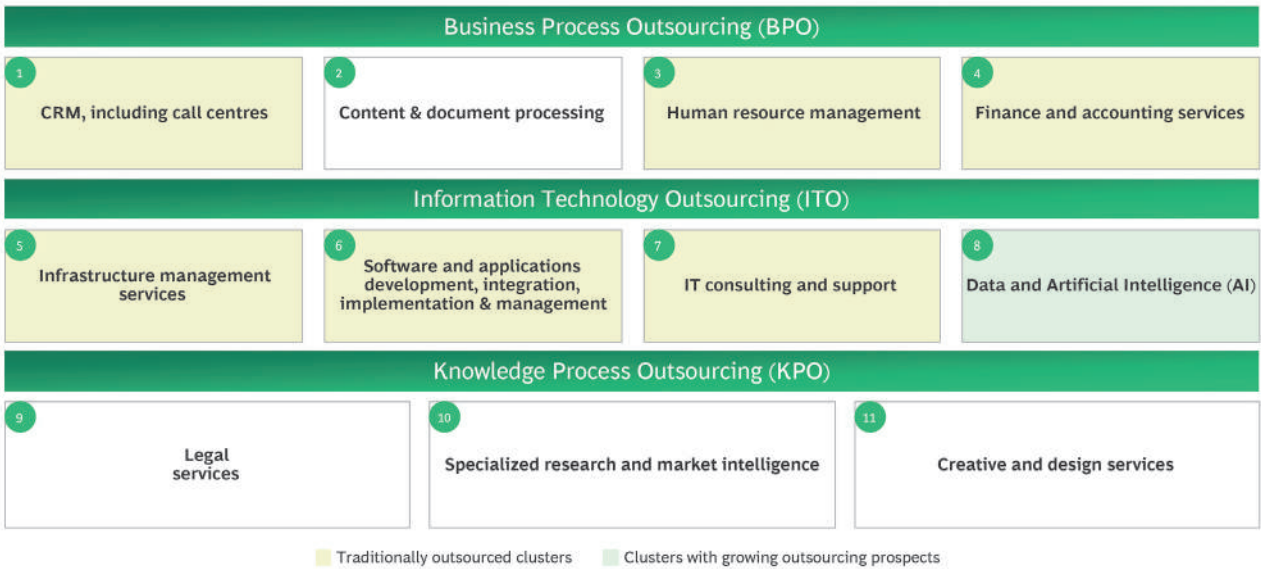
Job clusters were categorized as either traditionally out-sourced or showing strong outsourcing growth potential (Figure 35).

3.7.2 NOTABLE INDUSTRIES FOR SOURCING-IN TALENT
The most prominent industries when it comes to spending on job outsourcing services and sourcing-in talent include:

- Financial services (e.g., BNP Paribas outsourcing human resources management to Portugal; Société Générale outsourcing IT services to Morocco)
- Pharmaceuticals (e.g., Sanofi outsourcing design services to Czech Republic)
- Telecommunications (e.g., Orange outsourcing call centers to Morocco, Tunisia, and Senegal; SFR outsourcing call centers to Morocco and Tunisia; Bouygues outsourcing call centers to Portugal, Romania, and Morocco)
- Logistics (e.g., Air France outsourcing IT services to India)

Figure 35 - France job clusters outsourcing categorization

Job clusters most outsourced in France

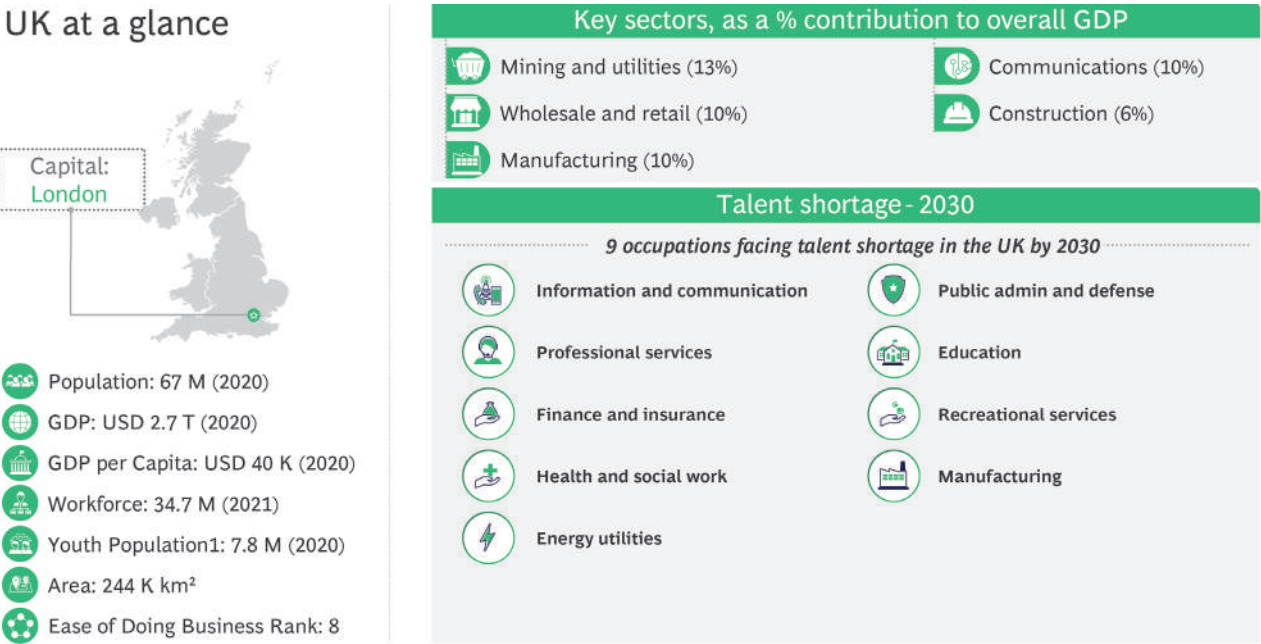


3.7.3 ORIGIN OF EXISTING SUPPLY AND REQUIREMENTS
Currently, France’s talent pool supply for outsourced jobs comes mainly from Morocco, Central Europe (including Czech Republic and Romania), Portugal, Tunisia, Lebanon, and India. Morocco accounts for half of all Franco-phone offshoring services and is mostly focused on call centers.

3.8 Deep-dive: United Kingdom outsourcing prospects

The UK is a leading economic powerhouse, with a GDP of ~ USD 2.7 trillion in 2020 (Figure 36). UK’s economy is diverse, with world-class industries including life sciences, ICT, creative, financial and professional business services, aerospace and automotive engineering.

Figure 36 - UK at a glance



Source: 1. 15-24 years old; Source: World Bank, Statista, Rethinking skills to tackle the UK’s looming talent shortage, BCG analysis

3.8.1 JOB OUTSOURCING NEEDS (DEMAND) AND TALENT POOL (SUPPLY)

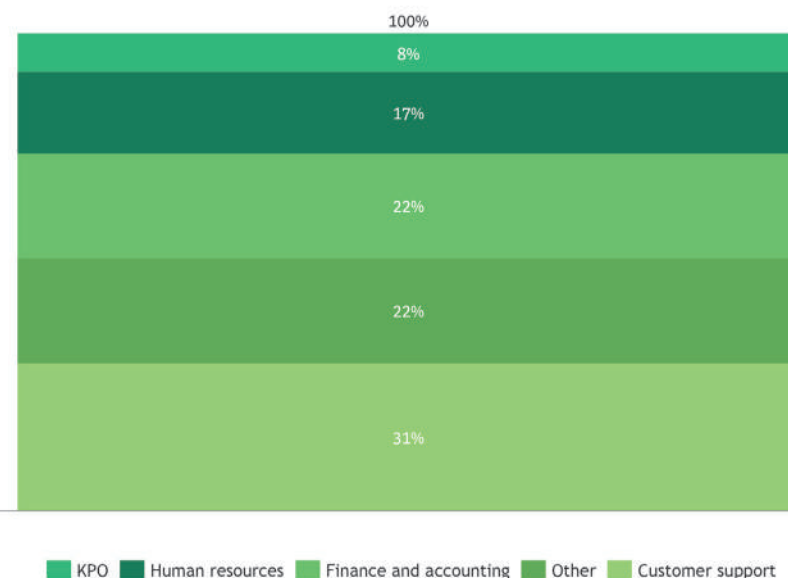
UK is one of the largest suppliers of talent where local supply of outsourcing services (i.e., revenues from outsourcing services) in the UK is estimated at USD 13 billion in 2020. Customer support, finance and accounting, human resources, and KPO are the most notable jobs and job clusters supplied by the UK (Figure 37).

However, the UK is one of the key markets or demand “hot spots” for job outsourcing. The total spending by UK-based organizations on outsourcing services (both from local and offshore service providers) was estimated at ~ USD 39 billion in 2020 and is expected to reach ~ USD 55 billion in 2025, with a compounded annual growth rate (CAGR) of ~7% (Figure 38).

Figure 37 - Breakdown of revenues from outsourcing services in the UK



Supply - Revenues from outsourcing services (USD Billion)



The projections imply undersupply by local players and inability to meet local demand. This demand-supply gap presents a significant opportunity for offshore job outsourcing service providers.

Job clusters that have traditionally been prone to some level of outsourcing in the UK include IT consulting and support (e.g., HSBC outsourcing IT services), software and application development, CRM including call centers (e.g., Barclays outsourcing call center roles), finance and accounting services, and HRM (Figure 39).

Figure 39 - Breakdown of UK spending on sourcing-in talent, per cluster



Breakdown of spending (in %) on sourcing-in talent, per cluster

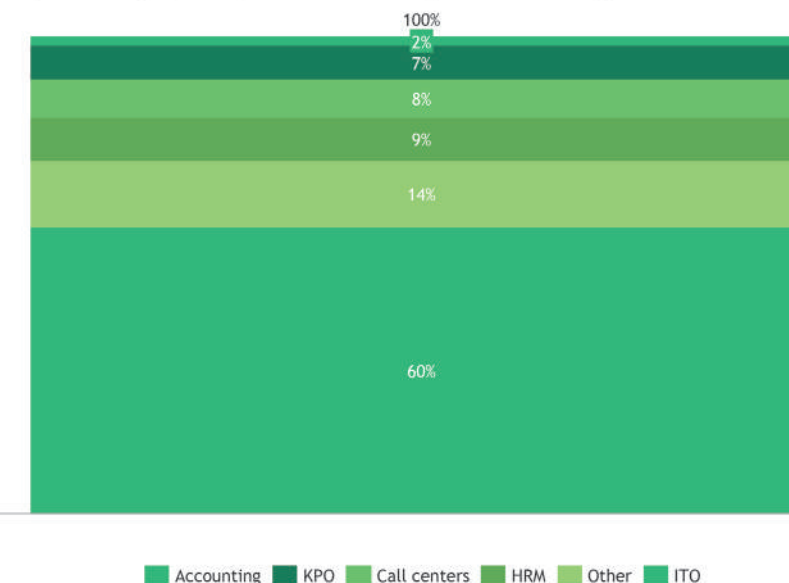


Figure 38 - Growth in demand for sourcing-in talent



Demand – Total spending on sourcing-in talent (USD Billion)



The UK is a developed country, with considerable economic, scientific, and technological influence internationally. It has unveiled various strategies to grow its digital economy, and its future agenda features themes such as “innovation”, “digital transformation”, and “machine learning”. Analysis of UK’s future of work studies shows the particular significance of two job clusters to the UK’s future economic outlook which also indicate strong growth potential for job outsourcing:

- Data and AI (e.g., information specialists)
- Specialized research and market intelligence (e.g., educational staff)

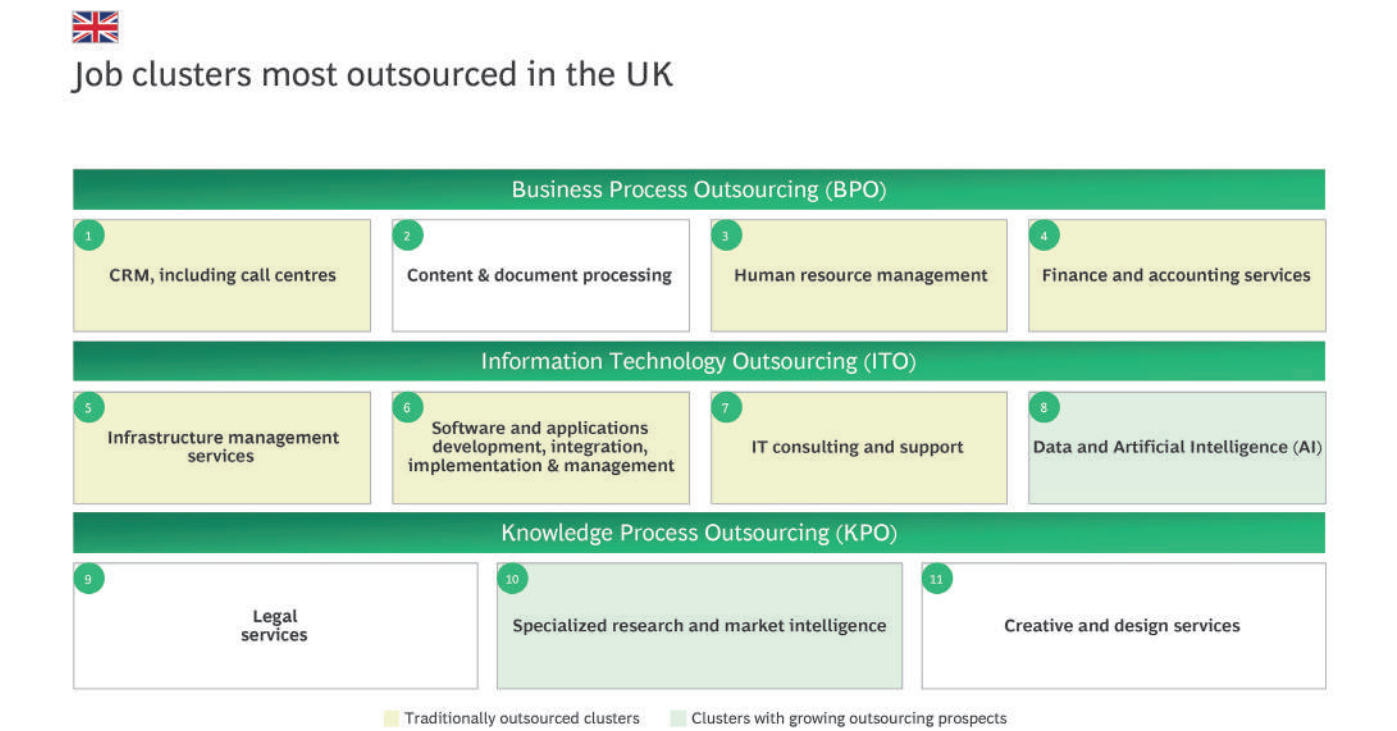
Job clusters were categorized as either traditionally outsourced or showing strong outsourcing growth potential (Figure 40).

3.8.2 NOTABLE INDUSTRIES FOR SOURCING-IN TALENT

The most prominent industries when it comes to spending on job outsourcing services and sourcing-in talent include:

- Financial services (e.g., Barclays outsourcing back-office and call center roles to India; HSBC outsourcing IT services to Egypt)
- Oil and gas (e.g., British Petroleum outsourcing IT support to India)

Figure 40 - UK job clusters outsourcing categorization



- Telecommunications (e.g., Vodafone outsourcing IT services to India)
- Consumer goods (e.g., Unilever outsourcing human resources services to several countries including India, Poland, Romania etc.)
- Retail (e.g., Tesco outsourcing IT support to India; Virgin outsourcing back-office BPO roles to South Africa)

3.8.3 ORIGIN OF EXISTING SUPPLY AND REQUIREMENTS
Currently, the UK’s talent pool supply for outsourced jobs comes mainly from India, South Africa, Ukraine, and Egypt. India is the historical offshoring destination providing services for the biggest UK companies. South Africa competes on quality and value-add, with 78% of South African BPO work destined for UK companies.

04 Supply: Learnings from case studies and methodology

4.1 Case studies: Markets renowned for talent supply

Job outsourcing and offshoring emerged with large corporations in developed countries outsourcing non-core parts of their businesses. Examples include airlines outsourcing their call centers and IT support functions, and financial institutions outsourcing documentation and data entry functions. In response, several countries developed remote work ecosystems to serve these offshore markets. They offer affordable, abundant, qualified talent, supported by a stable ecosystem, including an established market environment, strong physical and digital infrastructure, and a supportive regulatory landscape.

Six case studies were conducted as part of this study: India, Bangladesh, Philippines, China, Ukraine, and Poland. These countries:

- Are well known for their job outsourcing ecosystems
- Exemplify different job outsourcing archetypes (including focus on mainstream vs. intermediate vs. sophisticated jobs)
- Have extensive data available

The case studies include outsourcing market size, key outsourced clusters, key countries served, high-level snapshot of the workforce, outsourcing enablers, and upskilling initiatives. (See appendix section 12.3 for further details on the case studies).




4.1.1 SUPPLY MODELS OBSERVED

Three high-level talent supply models were observed (Figure 41) from benchmarking and the case studies:

- **Mainstream jobs (tier 3) supply.** Countries mainly supply other markets with labor offering basic technical skills (such as data entry, phone operating, etc.) and low digital skills.
- **Intermediate jobs (tier 2) supply.** Countries mainly supply other markets with labor offering strong knowledge in specific technical skills (such as law, accounting, etc.) and basic digital skills.
- **Sophisticated jobs (tier 1) supply.** Countries mainly supply other markets with labor offering proficiency/specialization in some fields (such as coding, design, etc.) and strong digital skills.

Figure 41: Job outsourcing supply models

Three talent supply models for job outsourcing

	Mainstream jobs Tier 3	Intermediate jobs Tier 2	Sophisticated jobs Tier 1
Key job clusters served	<ul style="list-style-type: none">• CRM, including call centres• Content & document processing• Human resource management• IT consulting and support	<ul style="list-style-type: none">• Legal services• Finance and accounting services	<ul style="list-style-type: none">• Infrastructure mgt. services• Software and applications dev. integration, & management• Specialized research & market intelligence• Creative and design services• Data and Artificial Intelligence
Other job clusters served	<ul style="list-style-type: none">• Finance and accounting services	<ul style="list-style-type: none">• Specialized research and market services• Creative and design services	<ul style="list-style-type: none">• Legal services
Typical skillsets	<ul style="list-style-type: none">• Basic technical skills (including data entry, communication, etc.)• Low digital skills required	<ul style="list-style-type: none">• Strong knowledge in respective technical fields (law, accounting, etc.)• Basic digital skills required	<ul style="list-style-type: none">• High proficiency/specialization in some fields (coding, design, etc.)• Strong digital skills required
Key success factors	<ul style="list-style-type: none">• Labor abundance• Low labor costs and cheap land availability	<ul style="list-style-type: none">• Labor availability with quick learning abilities and flexibility to adapt• Tax exemptions and incentives	<ul style="list-style-type: none">• Labor specialization and qualifications• Strong digital infrastructure (including cybersecurity)
Example countries			
# of jobs available	Labor sophistication and educational requirements		

The supply of jobs in the benchmarked countries was quite diverse, covering almost all job clusters and cutting across all three supply models. However, the majority of the “outsourcing talent supply workforce” in each benchmarked country appeared to fit one model more than others.

4.1.2 TALENT SUPPLY PILLARS AND ENABLERS

The case studies revealed five pillars that enable a remote work ecosystem for suppling talent to markets with high job outsourcing:

Labor availability and qualifications:

- Labor qualification requirements vary per supply model.
- Labor abundance and language proficiency are key for success.
- Low labor salaries are key to increasing country attractiveness.

Market environment:

- Political and economic stability are key for business continuity.
- Cultural fit and proximity of time-zones are important differentiators.

Infrastructure (digital and physical):

- High-end telecom facilities and digital infrastructure (including cyber and data security) are key for the success of the ecosystem.
- Proper physical infrastructure is key to ensuring connectivity and allowing the mobility of employees.

Regulatory landscape:

- Provision of tax relief and exemptions, and subsidies (e.g., for rent) significantly increases market attractiveness.

Creation of supportive policies and legal frameworks favors growth of the ecosystem and its scalability, via continuous incentivization of new players to enter the remote work supply market.

- Establishment of special economic zones (SEZs), hubs and clusters increases businesses’ sustainability and provides end-to-end (i.e., from education to employment) opportunities to the population.
- Existence of private and public incubators/ accelerators seeds game changing projects for citizens and the community (e.g., on upskilling, etc.).

Upskilling:

- Upskilling the workforce is key to establishing these remote work ecosystems to supply talent, especially for sophisticated or high-demand jobs.
- Upskilling initiatives can be led by government, private sector, or not-for-profit institutions.
- Upskilling can take place via different interventions, including influencing policymakers, designing trainings and bootcamps, providing non-formal career support, etc. (see appendix section 12.11 for further details on upskilling interventions).

4.2 Methodology: Countries’ value proposition and talent pool analysis

4.2.1 DETERMINING CLUSTERS AND AREAS OF FOCUS
The focus countries’ value propositions and talent pools were assessed using the five enabling pillars identified above. Each pillar was evaluated along its multiple dimensions and relevant KPIs (see table below for more details).

For each country of focus, labor qualifications and availability (i.e., abundance) were evaluated across 12 remote work talent personas – i.e., personas that are well suited to occupy roles in jobs that are outsourced (see appendix section 12.4 for further details).

PILLARS	DIMENSIONS	SUB-DIMENSION/ KPIS
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">• Percentage of population with university degree• Ranking of universities in Arab region based on the QS World University Rankings• Country rankings on digital skills, quality of education system, and quality of Math and Science education from the WEF Global Competitiveness Report• Other qualitative analysis or insights
	Language proficiency	<ul style="list-style-type: none">• Percentage of population speaking Arabic, English, and other languages• Other qualitative analysis or insights
	Labor availability	<ul style="list-style-type: none">• INSEAD Global Talent rankings• Ease of finding skilled employees rankings, from the INSEAD Global Talent Competitiveness Index report• Competitiveness Index• Unemployment rate• % of population living in urban areas• Labor abundance, analyzed top-down leveraging data on pre-determined talent personas• Other qualitative analysis or insights
	Labor cost	<ul style="list-style-type: none">• Labor salaries• Financial attractiveness score based on the 2021 Global Services Location Index• Other qualitative analysis or insights
	Political stability	<ul style="list-style-type: none">• Political risk score based on S&P Global’s methodology for country risk scoring• Political stability index from the INSEAD Global Talent Competitiveness Index report• Other qualitative analysis or insights
	Economic stability	<ul style="list-style-type: none">• Economic risk score based on S&P Global’s methodology for country risk scoring• GDP growth rate (%)• Inflation rate (%)• Economic freedom based on the Index of Economic Freedom• Other qualitative analysis or insights
Market environment	Proximity to well-known demand hot spots	<ul style="list-style-type: none">• Time difference with key GCC and European countries
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none">• Language commonalities with key GCC and European countries• Other qualitative analysis or insights

PILLARS	DIMENSIONS	SUB-DIMENSION/ KPIS
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> Internet penetration rate Internet broadband speeds Other qualitative analysis or insights
	Digital maturity levels	<ul style="list-style-type: none"> GovTech Maturity Index rankings, launched by the World Bank Huawei Global Connectivity Index Other qualitative analysis or insights
	Physical infrastructure readiness	<ul style="list-style-type: none"> Quality of road infrastructure rankings from the WEF Global Competitiveness Report Other qualitative analysis or insights
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Abundance of and accessibility to co-working spaces Other qualitative analysis or insights
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Corporate income tax rates Other qualitative analysis or insights, including analysis of governmental incentives
	Special economic zones' availability	<ul style="list-style-type: none"> Qualitative analysis or insights on special economic zones' existence and incentives provided
	Data and IP protection laws	<ul style="list-style-type: none"> IP protection laws Data protection laws Other qualitative analysis or insights
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Other qualitative analysis or insights, including government involvement in setting up outsourcing businesses and regulations to govern job matching platforms
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Analysis of key government initiatives for talent skilling, upskilling, and re-skilling
	Private sector efforts	<ul style="list-style-type: none"> Analysis of key private sector initiatives for talent skilling, upskilling, and re-skilling
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Analysis of key not-for-profit initiatives for talent skilling, upskilling, and re-skilling

Analysis with respect to these pillars, dimensions and sub-dimensions/ KPIs was leveraged to identify the countries' competitive advantages and challenges, and ultimately aided in shortlisting areas of focus for talent pool supply.

4.2.2 CATEGORIZING AREAS OF FOCUS

Each country's identified areas of focus were then categorized into short and long-term opportunities based on two dimensions:

- Supply-side, to assess whether the talent supply per cluster or area can be quick to market or requires enabling.

Those categorized as quick to market fit three criteria:

- Labor availability (i.e., are there enough people in the local landscape that can occupy roles associated with the areas of focus)
- Labor qualifications (i.e., is the workforce ready to occupy relevant roles or does it require upskilling)
- Ecosystem readiness (i.e., is there a supporting ecosystem to help prepare talent to occupy relevant roles and increase the workforce's market exposure, where relevant)

- Demand-side.** Leveraging the earlier categorization of job cluster attractiveness.

Such assessment helped further prioritize opportunities in both the short- and long-term (Figure 42).

The two-dimensional matrix above highlights four levels of priority:

- Areas worth time and effort invested.** Areas that are currently sizeable and are steadily growing (both quick to market and requiring enablement), and areas that are small in size but growing and that are quick to market.
- Areas worth time and effort invested, if focus is not diverted from elsewhere.** Areas that are small in size but growing and that require enablement.

- Areas worth time and effort invested, if costs to establish are low.** Areas that are sizeable but diminishing and that are quick to market.

- Areas not worth investing in.** Areas that are sizeable but diminishing and that require enablement.

The matrix also serves in determining time horizon for areas of focus:

- Short-term areas of focus.** Areas that are quick to market and sizeable.
- Long-term areas of focus.** Areas that either require enabling or areas that are small in size.

Figure 42 - Methodology for cluster and areas of focus prioritization

Demand and supply dimensions analyzed...

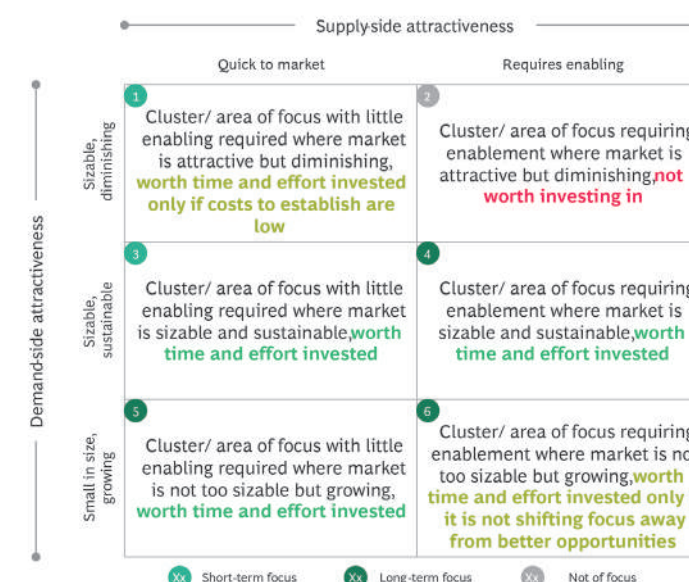
Supply-side criteria

- Quick to market
- Requires enabling (incl. upskilling, etc.)

Demand-side criteria

- Sizable cluster market, expected to diminish
- Sizable cluster market, expected to sustain
- Small cluster market, expected to grow

...to prioritize clusters/ areas of focus



4.2.3 SKILLING, UPSKILLING AND RE-SKILLING METHODOLOGY

Labor qualifications, abundance and broader ecosystem challenges associated with the identified areas of focus were outlined. Subsequently, skilling, upskilling and re-skill-

ing initiatives (Figure 43) were recommended (per cluster and per country), to help address the labor challenges.

Finally, key providers and potential initiative leads (Figure 44) were identified.

Figure 43 - Categorization of skilling, upskilling and re-skilling initiatives

Skilling, upskilling, and re-skilling initiatives include both training and incentives

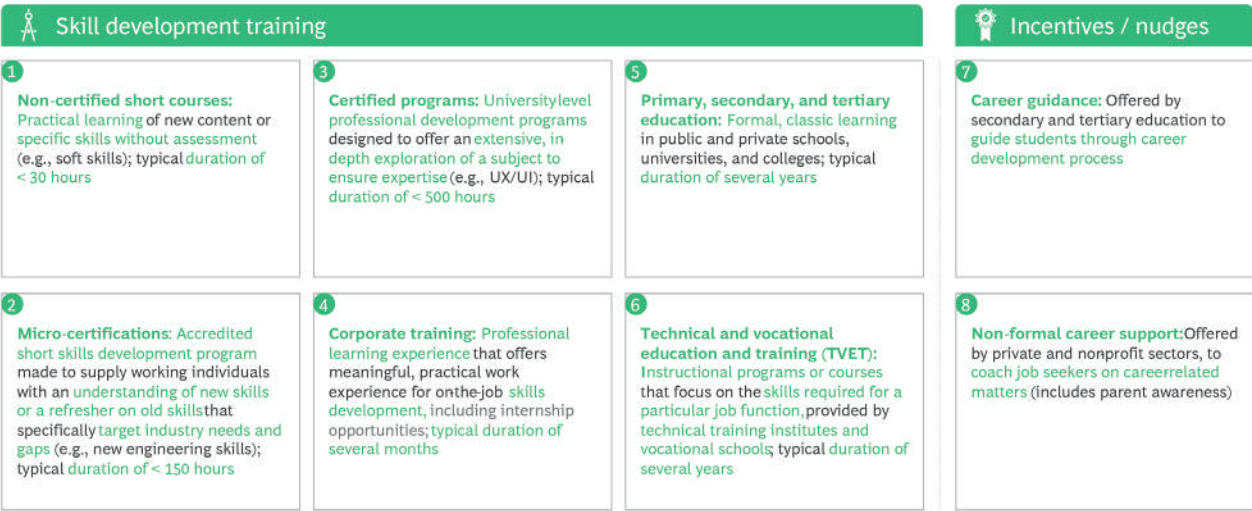
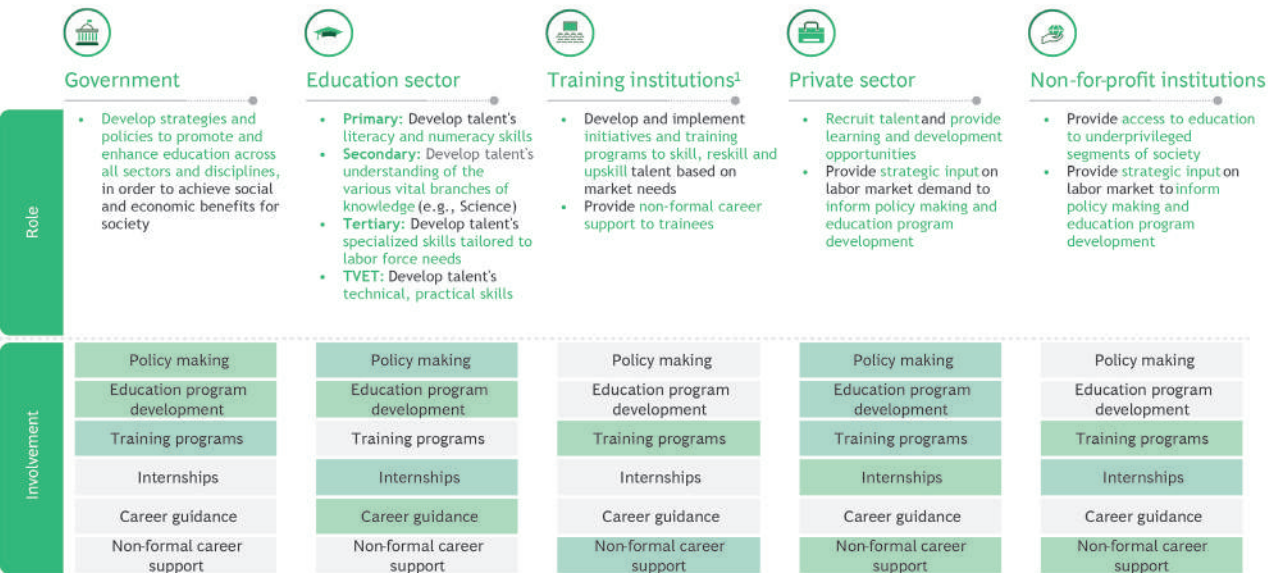


Figure 44 - Skilling, upskilling, and re-skilling providers

Five main providers of skilling, upskilling, and re-skilling initiatives with different roles and levels of involvement



Source: 1. Includes massive open online course providers such as edX and Coursera

05 Lebanon - A talent-driven out-sourcing hub for sophisticated jobs

5.1 Baseline

Lebanon is a small Arab country located on the Eastern shore of the Mediterranean Sea (Figure 45). The country has been hit by one of the world's worst economic crises, experiencing ~ 95% currency devaluation and almost 200% inflation since early 2020.

5.1.1 CURRENT OUTSOURCING SUPPLY LANDSCAPE

Today, Lebanon offers various Business Process Outsourcing (BPO), Information Technology Outsourcing (ITO) and Knowledge Process Outsourcing (KPO) services, serving entities both within Lebanon and abroad. Approximately 5,000 employees are employed in the BPO and ITO outsourcing sectors and an estimated 200 companies currently operate in such activities. A number of well-known companies operate in KPO services, offering engineering design, management consulting, market research, and creative services (marketing, media, etc.). "Transforming Lebanon into an outsourcing hub" is one of the key recommendations in the Economic Vision for Lebanon, which was developed in 2018 and adopted by the Lebanese government.

5.1.2 JOB MATCHING PLATFORMS FOR OUTSOURCED AND OFFSHORE JOBS

Numerous job matching platforms connect local talent with local, regional, and global companies, including:

- B.O.T (Bridge. Outsource. Transform): Impact sourcing platform that provides high quality digital services executed by skilled freelancers from marginalized communities in Lebanon
- The Lebanon Outsourcing Initiative: Connects local talent with global companies seeking specialized services
- Jobs for Lebanon: Matches local talent with job opportunities made available by the global diaspora

5.2 Value proposition and talent pool

The five key pillars for a successful job outsourcing talent ecosystem were assessed to identify Lebanon's value proposition and competitive advantages (see table below, and further details in appendix section 12.5). In summary,

Figure 45 - Overview of Lebanon

Lebanon at a glance



Source: 1. In 2028-2019; 2. In 2021; 3. 15-24 years old

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none"> One of the top educational systems in the region and home to world-class universities Ranks 18th globally in quality of education system, and 4th in quality of Math and Science Education 	Strong
	Language proficiency	<ul style="list-style-type: none"> Strong pool of tri-lingual labor, speaking and writing Arabic, English, and French 	Strong
	Labor availability	<ul style="list-style-type: none"> Ranks 71st in 2021 Global Talent Competitiveness Index and 5th out of 134 countries in ease of finding skilled employees 	Strong
	Labor cost	<ul style="list-style-type: none"> Cost-competitive labor, nearly 27% less costly than GCC countries and nearly 55% lower than developed countries 	Strong
Market environment	Political stability	<ul style="list-style-type: none"> High political risk score, among the highest in MENA and globally 	Lagging
	Economic stability	<ul style="list-style-type: none"> High economic risk score; among highest in the world given severe economic crisis and high inflation rates; risk partially offset by a strong, innovative, and highly ranked start-up ecosystem 	Lagging
	Proximity to well-known demand hot spots	<ul style="list-style-type: none"> Strategically located close to well-known regional and global demand hot spots (e.g., GCC, Europe) 	Strong
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none"> Multilingual population and vast diaspora bridging the cultural gap between Lebanon and the other Arab, European, and American countries 	Strong
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> High internet penetration rate (94% in 2019 versus global of 63%) Low broadband speed despite deployment of fiber optic in select regions 	Medium
	Digital maturity levels	<ul style="list-style-type: none"> Ranks medium in the GovTech Maturity Index Ranks 2nd in the region in the Digital Access Index 	Strong
	Physical infrastructure readiness	<ul style="list-style-type: none"> Long-term structural vulnerabilities and low-grade infrastructure Ranks 127th globally (out of 141) for quality of road infrastructure 	Lagging
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Abundant co-working spaces with prime infrastructure, connectivity, and vibrant business environment 	Strong

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Financial and non-financial incentives for investors in key sectors for all types of projects Corporate income taxes fixed at 17% 	Strong
	Special economic zones' availability	<ul style="list-style-type: none"> No operational special economic zones in place 	Lagging
	Data and IP protection laws	<ul style="list-style-type: none"> No data protection legislation Privacy provisions contained in Law No. 81 on Electronic Transaction and Personal Data 	Medium
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Some degree of government involvement in enabling easy set-up of outsourcing businesses (e.g., facilitating issuance of call center licenses) 	Medium
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Relatively weak investment in skilling, re-skilling and upskilling talent with initiatives either outdated and/ or not fully implemented 	Lagging
	Private sector efforts	<ul style="list-style-type: none"> Insufficient supply of placements and apprenticeships offered to employees One of highest concentration of training institutions per capita in any MENA country 	Medium
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Multiple initiatives launched to skill, re-skill and upskill talent across key capabilities, including digital 	Strong

Lebanon has great potential to evolve into a talent supply hub for offshore jobs, mainly driven by its highly qualified, language proficient, and cost competitive labor force

(Figure 46). However, challenges, including political and economic risks, may threaten the country's outsourcing prospects.

Figure 46 - Lebanon's advantages and challenges

Summary: Lebanon offers many key cross-cutting advantages for outsourcing businesses...

- Highly qualified and easily accessible skilled labor, with one of the top educational systems in the region
- Cost-competitive, trilingual workforce fluent in Arabic, English, and French
- Well-established outsourcing industry across BPO, ITO, and KPO
- Outsourcing job matching platforms available to identify and hire labors for outsourcing purposes
- Strong and innovative startup ecosystem backed by the private sector
- Strategic location and similarity of country's culture to well-known demand hotspots
- Some involvement of government to facilitate setup of outsourcing businesses (e.g., call center licensing)
- Large network of co-working spaces with proper infrastructure (internet, electricity, etc.)
- Low corporate tax rates (fixed at 17%)

...but key challenges need to be addressed for outsourcing to reach its full potential

- High risk of business disruptions due to political and economic instability
- Absence of operational special economic zones to incentivize outsourcing business establishment
- Limited government investment in incentivizing outsourcing businesses
- Weak IP protection enforcement and absence of data protection laws
- Low-grade physical infrastructure with multiple vulnerabilities (electricity, water, public transport)
- Lagging telecom infrastructure requiring significant improvements
- Limited involvement of government and private sector to skill, re-skill and upskill talent in country

5.3 Recommended areas of focus

With its highly qualified, multilingual, and cost competitive labor force, Lebanon has great potential to become a talent supply hub for offshore work across six areas of focus.

For additional details on talent abundance and qualifications, please refer to section 12.5.2 in the appendix.

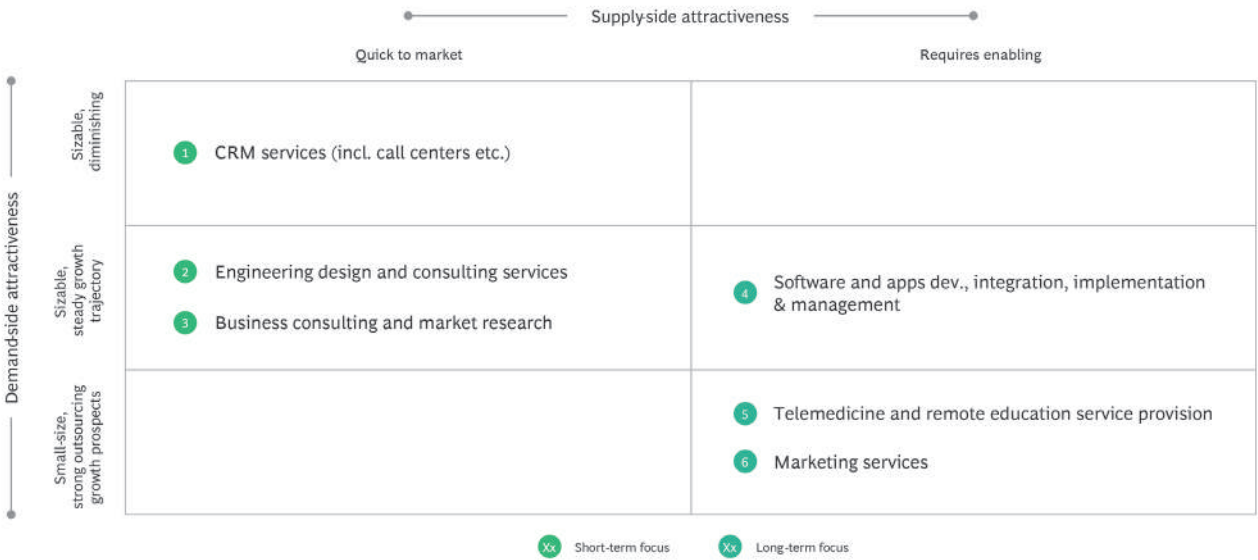
AREAS OF FOCUS	KEY FINDINGS
Customer Relationship management (including call centers)	<p>Advantages:</p> <ul style="list-style-type: none">Abundant laborQualified talent, proficient in at least two languagesLow average salaries compared to peers (e.g., Morocco)Government incentives facilitating call center set-upMinimal and low-cost skilling, re-skilling and upskilling required for people, including the unemployed, making them attractive to employers seeking CRM talent <p>Potential drawbacks:</p> <ul style="list-style-type: none">Low political stability can pose risk of business disruptionsWeak physical infrastructure and internet speeds can prevent workers in rural areas from properly performing their jobs
Software and apps development, integration, implementation	<p>Advantages:</p> <ul style="list-style-type: none">Medium abundance of fresh graduatesQualified, trilingual software and computer engineering graduates and experienced professionalsLow average salaries compared to GCC and European countriesAccess to co-working spaces with proper infrastructure, offsetting potential infrastructure-related drawbacks <p>Potential drawbacks:</p> <ul style="list-style-type: none">Absence of data protection laws and weak enforcement of IP protection lawsLow abundance of experienced professionals due to the loss of talent caused by the severe economic crisis
Business consulting and market research	<p>Advantages:</p> <ul style="list-style-type: none">Abundant laborQualified, trilingual talent skilled in problem solving and critical thinkingEstablished ecosystem for business consulting and market research and firms matching freelance consultants with big consulting firms (e.g., QO Collective)Access to co-working spaces with proper infrastructure, offsetting potential infrastructure-related drawbacks
Engineering design and consulting services	<p>Advantages:</p> <ul style="list-style-type: none">Abundant labor with a large pool of engineers and architects graduating every yearQualified engineering and architecture graduates and experienced professionalsLow average salaries compared to GCC countriesEstablished ecosystem for engineering design and consulting firms serving markets abroad (including big players such as Dar Al-Handasah and Khatib & Alami)Access to co-working spaces with proper infrastructure, offsetting potential infrastructure-related drawbacks

AREAS OF FOCUS	KEY FINDINGS
Marketing services	<p>Advantages:</p> <ul style="list-style-type: none">Medium abundance of fresh graduates and experienced professionalsQualified marketing graduates and experienced professionalsExisting marketing ecosystem of 10 to 20 SMEs serving markets abroadAccess to co-working spaces with proper infrastructure, offsetting potential infrastructure-related drawbacks <p>Potential drawbacks:</p> <ul style="list-style-type: none">Loss of graduates caused by the severe economic crisis and salaries' unattractiveness compared other countries (e.g., GCC countries)
Telemedicine and remote education service provision	<p>Advantages:</p> <ul style="list-style-type: none">Abundant laborQualified medical doctors and teachers (both fresh graduates and experienced practitioners)Existence of several renowned hospitals with regional outreach (e.g., AUBMC)Established ecosystem of online education platforms (~17 EdTech start-ups)Few training and upskilling initiatives on telemedicine and/or online tutoring are available locally

The identified areas of focus were then further prioritized in terms of importance and timing (Figure 47).

Figure 47 - Lebanon areas of focus prioritization

Three short and three long-term areas of focus identified



Short-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Customer Relationship management (including call centers)	1. Various population segments (including disadvantaged communities) can receive quick skilling and upskilling to occupy CRM jobs	1.1 Encourage specific population segments to obtain micro certifications in CRM tools and enroll in short courses on soft skills
Engineering design and consulting services	2. Experienced professionals are qualified but can benefit from further distinction	2.1 Encourage experienced professionals to obtain certifications in emerging/ niche fields 2.2 Enable internships and development of soft and multidisciplinary skills for new graduates
	3. Fresh graduates are qualified but lack “real-life” work experience	3.1 Enable internships and development of soft and multidisciplinary skills for new graduates 3.2 Promote career guidance for fresh graduates, highlighting opportunities in business consulting and market research related fields
Business consulting and market research	4. Fresh graduates are qualified but lack “real-life” work experience	4.1 Enable Internships and development of soft and multidisciplinary skills for new graduates 4.2 Promote career guidance for fresh graduates, highlighting opportunities in business consulting and market research related fields

Long-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Software and apps development, integration, implementation & management	1. Labor not too abundant (only ~1.5% of the population working in the ICT sector) coupled with challenges in retaining mid-career professionals due to the economic crisis	1.1 Intervene with policymakers to promote the expansion of existing or launching of new tertiary education programs in relevant fields 1.2 Promote career guidance for fresh graduates, highlighting opportunities in software and app development related fields 1.3 Encourage relevant workforce segments (with high similarities to jobs in software and app development fields) to obtain certifications and become eligible to occupy jobs in the software and app development fields 1.4 Encourage experienced professionals to obtain certifications 1.5 Enable internships and development of soft and multidisciplinary skills for new graduates
	2. Experienced professionals are qualified but certifications in the field are a significant plus	2.1 Intervene with policymakers to promote the expansion of existing or launching of new tertiary education programs in relevant fields 2.2 Promote career guidance for fresh graduates, highlighting opportunities in marketing services related fields 2.3 Encourage experienced professionals to obtain certifications in marketing services related fields (e.g., digital marketing certifications) 2.4 Fresh graduates can benefit from technical (including digital marketing certifications) and soft skills upskilling
	3. Fresh graduates are qualified but lack “real-life” work experience	3.1 Encourage experienced medical practitioners to obtain certifications in telemedicine 3.2 Encourage experienced teachers to obtain certifications in remote tutoring

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Marketing services	4. Labor not too abundant (existing marketing ecosystem with 10 to 20 SMEs of 10 to 50 employees each)	4.1 Intervene with policymakers to promote the expansion of existing or launching of new tertiary education programs in relevant fields
		4.2 Promote career guidance for fresh graduates, highlighting opportunities in marketing services related fields
	5. Experienced professionals are qualified but certifications in the field are a significant plus	5.1 Encourage experienced professionals to obtain certifications in marketing services related fields (e.g., digital marketing certifications)
	6. Fresh graduates are qualified but lack “real-life” work experience	6.1 Fresh graduates can benefit from technical (including digital marketing certifications) and soft skills upskilling
Telemedicine and remote education service provision	7. Medical doctors and teacher require skill-ing and upskilling on remote interactions	7.1 Encourage experienced medical practitioners to obtain certifications in telemedicine
		7.2 Encourage experienced teachers to obtain certifications in remote tutoring

5.4 Skilling, upskilling and re-skilling recommendations

Key skilling, upskilling and re-skilling initiatives (Figures 48-53) will increase the workforce’s attractiveness and further enable its potential as talent for offshore outsourced jobs.

For Lebanon’s short-term focus areas, these initiatives include (Figures 48-50):

- Customer relationship management: non-certified short-courses and micro-certifications
- Engineering design and consulting services: internship opportunities, non-certified short-courses, and micro-certifications
- Business consulting and market research: internship opportunities, non-certified short-courses, micro-certifications, and formal and non-formal career guidance

Figure 48 - CRM services recommendations



Deep dive: upskilling for CRM services (including call centers etc.)



Source: 1. Education for Employment 2. Including courses on empathy, mindset, successful communication, etc.

Figure 49 - Engineering design and consulting recommendations



Deep dive: upskilling for engineering design and consulting services



Figure 50 - Business consulting and market research recommendations



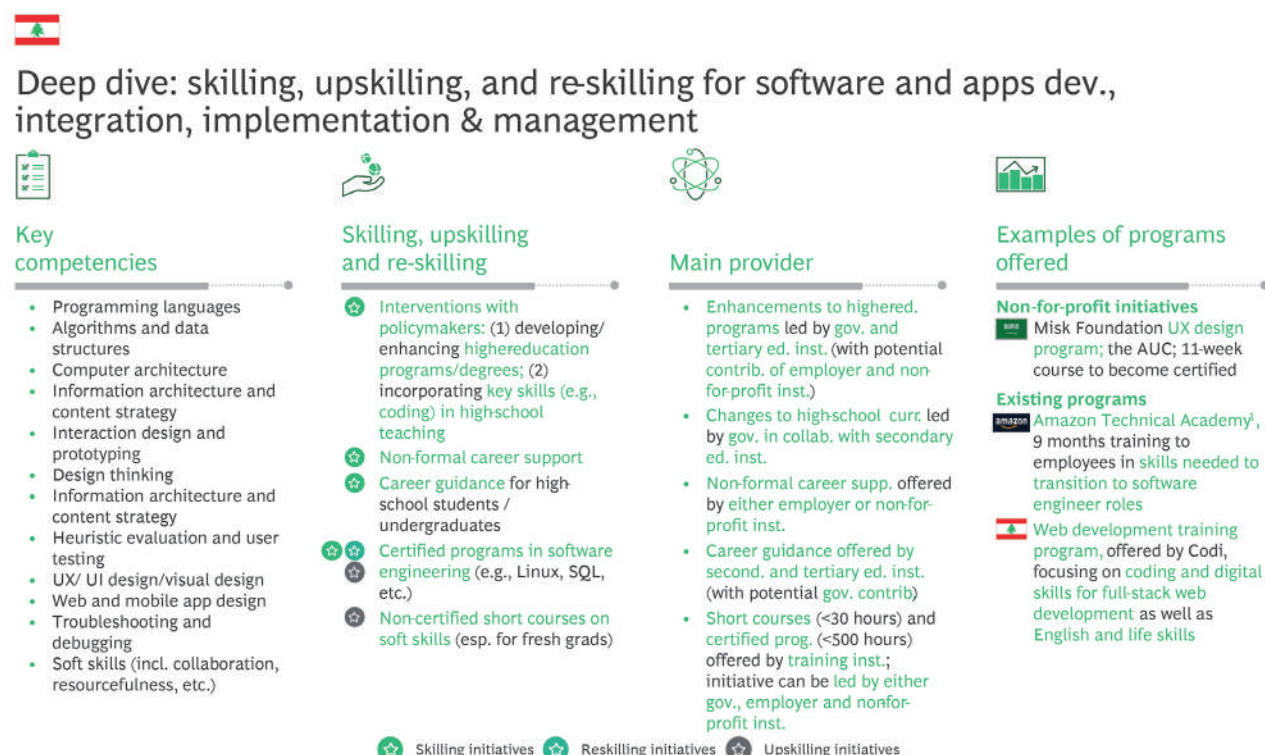
For the country's long-term focus areas, skill building initiatives include (Figures 51-53):

- Software and app development: interventions with policy makers, formal and non-formal career guidance, non-certified short courses, and certified programs

- Marketing services: interventions with policy makers, formal and non-formal career guidance, non-certified short courses, and micro certifications

- Telemedicine and remote education: interventions with policy makers, formal and non-formal career guidance, non-certified short courses, and micro certifications

Figure 51 - Software and app development recommendations

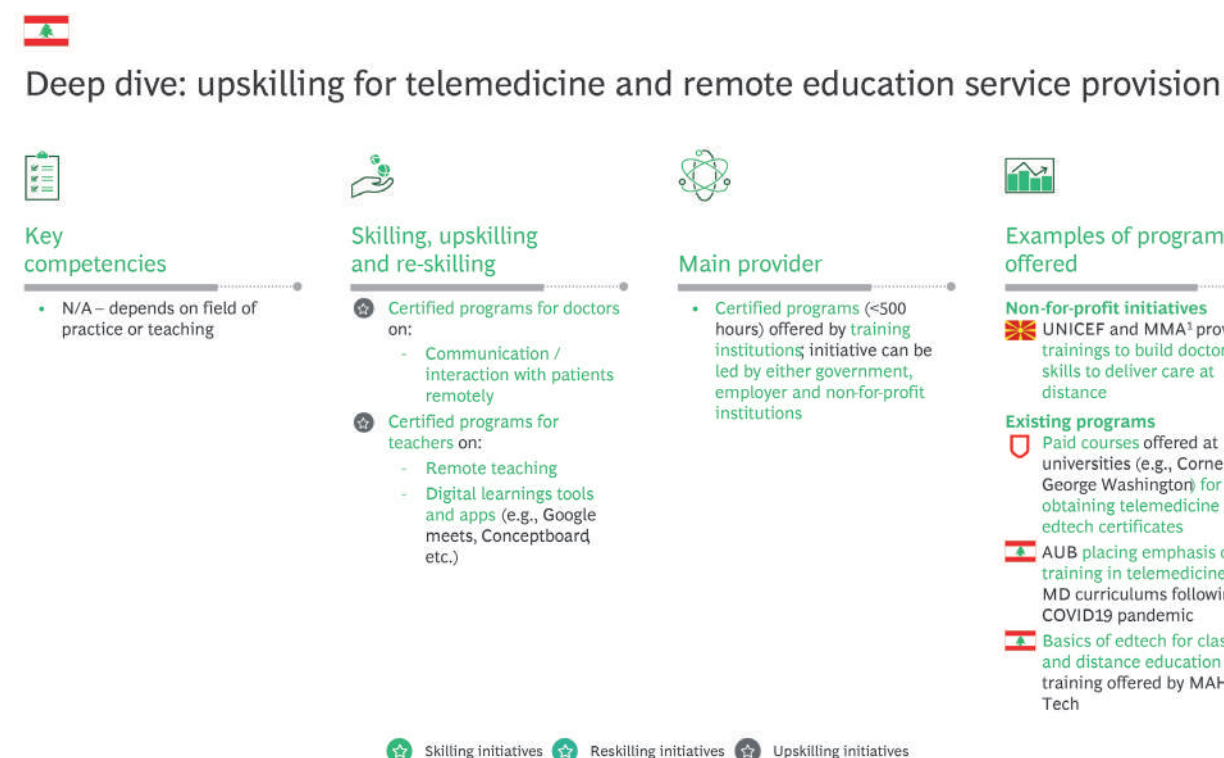


Source: 1. Program requires no previous training from applicants, only high school diploma

Figure 52 - Marketing services recommendations



Figure 53 - Telemedicine and remote education recommendations



Source: 1. Macedonia Medical Association

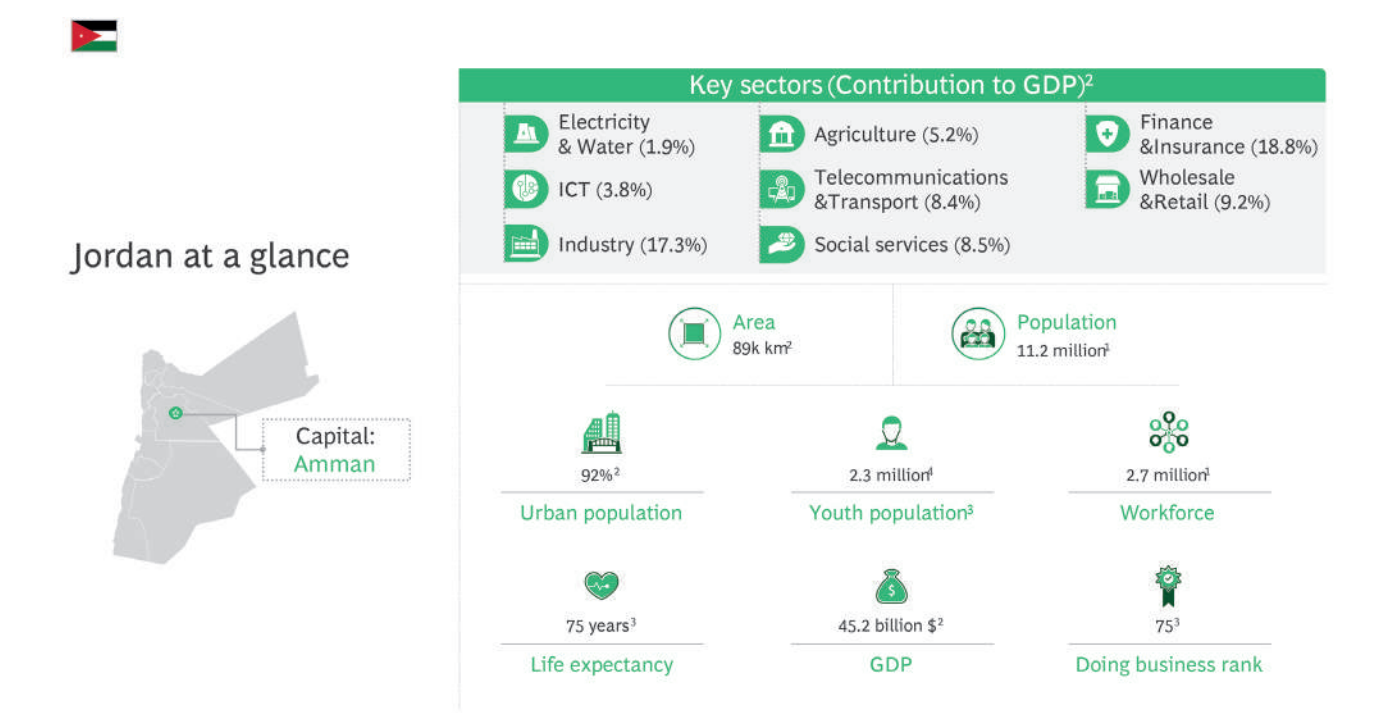
06 Demand: Jordan – A well-rounded outsourcing hub for sophisticated jobs

6.1 Baseline

The Hashemite Kingdom of Jordan is an Arab country located in the rocky desert of the northern Arabian Peninsula and in West Asia (Figure 54). The country is bordered

by Syria to the north, Iraq to the east, Saudi Arabia to the south and south-east, and Palestine (the West Bank) to the west. Jordan's economy achieved a 2.2% growth in 2021, driven by an expansion of the services and industrial sectors

Figure 54 - Overview of Jordan



Source: 1. In 2022; 2. In 2021; 3. In 2020; 4. 15-24 years old

6.1.1 CURRENT OUTSOURCING SUPPLY LANDSCAPE

Jordan is a well-established hub for various Business Process Outsourcing (BPO), Information Technology Outsourcing (ITO) and Knowledge Process Outsourcing (KPO) services. It is the 35th most popular offshoring destination worldwide, and the 3rd amongst MENA countries. Approximately 7,500 jobs have been created from the ITO and BPO sectors, with plans to add 10,000 more by 2023. KPO sector employs hundreds of employees providing management consulting services in the country and abroad.

6.1.2 JOB MATCHING PLATFORMS FOR OUTSOURCED AND OFFSHORE JOBS

Major regional and global platforms are accessible for freelancers, with many Jordanians already registered on:

- Upwork: Global freelancing platform connecting business with independent professionals and agencies around the globe.
- Khamsat: Digital marketplace for digital services targeting MENA countries.

6.2 Value proposition and talent pool

The five key pillars for a successful job outsourcing talent ecosystem were assessed to identify Jordan's value proposition and competitive advantages (see table below, and further details in the appendix section 12.6).

- Truelancer: Global freelance marketplace connecting businesses with on-demand, authentic and experienced freelancers and community professionals.
- TasmeemME: The Middle East's first regional online network dedicated to promoting and empowering Arab creative talent.

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">• Home to universities ranking top 10 in the Arab region• Ranks 43rd in quality of education and 62nd in quality of math and science education	Strong
	Language proficiency	<ul style="list-style-type: none">• Many bilingual people as English and Arabic are the primary languages of education	Medium
	Labor availability	<ul style="list-style-type: none">• Ranks 63rd in 2021 Global Talent Competitiveness Index and 21st out of 134 countries in ease of finding skilled employees	Strong
	Labor cost	<ul style="list-style-type: none">• Very cost competitive labor, with country ranking high in financial attractiveness of outsourcing in Global Services Location Index	Strong
Market environment	Political stability	<ul style="list-style-type: none">• Medium political risk score	Medium
	Economic stability	<ul style="list-style-type: none">• Low economic risk score, with GDP growing at 2.2% and inflation rate of 5.2% in 2022	Strong
	Proximity to well-known demand hot spots	<ul style="list-style-type: none">• Strategically located close to well-known regional and global demand hot spots (e.g., GCC, Europe)	Strong
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none">• Bilingual, educated, qualified labor and large diaspora bridging the cultural gap between Jordan and the other Arab, European, and American countries	Strong

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> Decent internet penetration rate, higher than the global average (66.8% versus global of 63%) Well-developed telecom infrastructure with 4G, fiber and broadband internet coverage and 5G being introduced 	Strong
	Digital maturity levels	<ul style="list-style-type: none"> Ranks high in the GovTech Maturity Index Ranks 66th in 2022 Digital Connectivity Index 	Strong
	Physical infrastructure readiness	<ul style="list-style-type: none"> Relatively developed infrastructure with high access to electricity (98%+ of population) and safe drinking water (~100% of population) Ranks 59th globally (out of 141) for quality of road infrastructure Public transport sector facing challenges in terms of high cost, coverage, and availability 	Medium
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Abundant co-working spaces with prime infrastructure, connectivity, and vibrant business environment 	Strong
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Several incentives offered by government to improve business climate, leading ease of doing business score to increase by 29 spots in 2020 Corporate income taxes fixed at 14% 	Strong
	Special economic zones' availability	<ul style="list-style-type: none"> Well-established system with over 14 development and free zones, providing multiple financial and non-financial incentives to businesses 	Strong
	Data and IP protection laws	<ul style="list-style-type: none"> No data protection laws in place (data protection law currently being drafted) Several laws passed in line with international commitments to protect intellectual property rights 	Medium
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Active involvement of government in enabling easy set-up of outsourcing businesses (e.g., 7 free trade agreements and 55 bilateral investment treaties established to enhance business climate) 	Strong

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Strong government investment in digital skilling, re-skilling and upskilling of talent through dedicated programs (e.g., graduate internship program) and partnerships with private organizations (e.g., partnership with Microsoft to provide free digital training programs to unemployed Jordanian youth) 	Strong
	Private sector efforts	<ul style="list-style-type: none"> Insufficient supply of formal trainings offered to employees Partnerships established between private sector entities to skill, re-skill and upskill Jordanian youth (e.g., partnership between Orange Jordan and Ericsson to deliver a digital learning program with courses on data science, automation, AI and machine learning) 	Medium
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Multiple initiatives launched to skill, re-skill and upskill talent across key capabilities, including digital and technology 	Strong

In summary, Jordan has excellent potential to grow into a talent supply hub for offshore jobs, with its qualified labor force, attractive market environment, advanced telecom infrastructure, and favorable regulatory landscape (Figure 55). However, challenges, including the absence of data protection laws, may threaten the country's outsourcing prospects.

6.3 Recommendations on areas of focus

Jordan's qualified labor force, and attractive market environment allow it to exhibit excellent potential to grow into a talent supply hub for offshore jobs across six areas of focus.

For additional details on talent abundance and qualifications, please refer to section 12.6.2 in the appendix.

Figure 55 - Jordan's advantages and challenges

Summary: Jordan offers many cross-cutting advantages for outsourcing businesses...

- Easily accessible skilled labor
- High economic stability and freedom
- Well-established outsourcing industry across BPO, ITO, and KPO
- Fast growing ICT sector with large annual ITO exports
- Strong investment in digital skilling, reskilling and upskilling by government and NGOs
- Strategic location and similarity of country's culture to well-known demand hotspots
- Active involvement of government to increase attractiveness of business landscape
- Well-established system of 14 special economic and development zones facilitating foreign investment
- IP protection regulations in place (Signatory to World Intellectual Property Organization treaties)
- Advanced telecom infrastructure with strong investment in digital transformation

...but key challenges need to be addressed for outsourcing to reach its full potential

- Potential risk of business disruptions due to medium political instability
- Some degree of skilling, re-skilling and upskilling needed to prepare workforce for jobs of the future (language proficiency)
- No data protection laws in place
- Underdeveloped public transportation sector facing multiple challenges
- Limited involvement of private sector to skill, re-skill and upskill talent in country

AREAS OF FOCUS	KEY FINDINGS
Customer Relationship management (including call centers)	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant labor Qualified, bilingual talent Low average salaries compared to GCC countries Minimal skilling, re-skilling and upskilling required for talent to perform call center work Politically stable with minimal risk of business disruption Well-developed telecom infrastructure
Software and apps development, integration, implementation and management	<p>Advantages:</p> <ul style="list-style-type: none"> Medium abundance of fresh graduates and low abundance of experienced professionals Qualified software and computer engineering graduates and experienced professionals Low average salaries compared to GCC countries Fast growing ICT sector with strong government investment in digital skilling, re-skilling and upskilling IP regulations in place Well-developed telecom infrastructure with high digital maturity Access to co-working spaces with proper infrastructure <p>Potential drawbacks:</p> <ul style="list-style-type: none"> Lack of experienced professionals in ICT fields Absence of data protection laws (laws being drafted, as per latest information)
Engineering design and consulting services	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant labor Qualified engineering and architecture graduates and experienced professionals Low average salaries compared to GCC countries Established ecosystem of independent service providers serving markets abroad (e.g., Engicon, Bitar Consultants Engineers, Dar Al-Handasah, Khatib & Alami)
Finance and accounting services	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant labor Qualified accounting experienced professionals Low average salaries compared to peers (e.g., Morocco) Strong digital finance services ecosystem with supportive regulatory environment and government support Large number of FinTech startups in Jordan (~ 50) supporting SMEs across MENA Well-developed telecom infrastructure with high digital maturity <p>Potential drawbacks:</p> <ul style="list-style-type: none"> Qualifications of fresh graduates lagging (Jordanian finance and accounting university programs do not appear on list of top programs worldwide)

AREAS OF FOCUS	KEY FINDINGS
Business consulting and market research	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant labor Qualified talent skilled in problem solving and critical thinking Low average salaries compared to peers (e.g., Lebanon) Presence of notable medium-sized consulting firms (e.g., EY-Parthenon, PwC) Well-developed telecom infrastructure with high digital maturity Access to co-working spaces with proper infrastructure
Telemedicine and remote education service provision	<p>Advantages::</p> <ul style="list-style-type: none"> Abundant labor Qualified medical doctors and teachers (fresh graduates and experienced practitioners) Existence of several renowned hospitals to train medical doctors (3 hospitals ranked among top 1000 hospitals worldwide) Established ecosystem of online education platforms (~50 EdTech startups) <p>Potential drawbacks:</p> <ul style="list-style-type: none"> Low quality of education ranking compared to peers (e.g., Lebanon) Absence of telemedicine training and/or online teaching

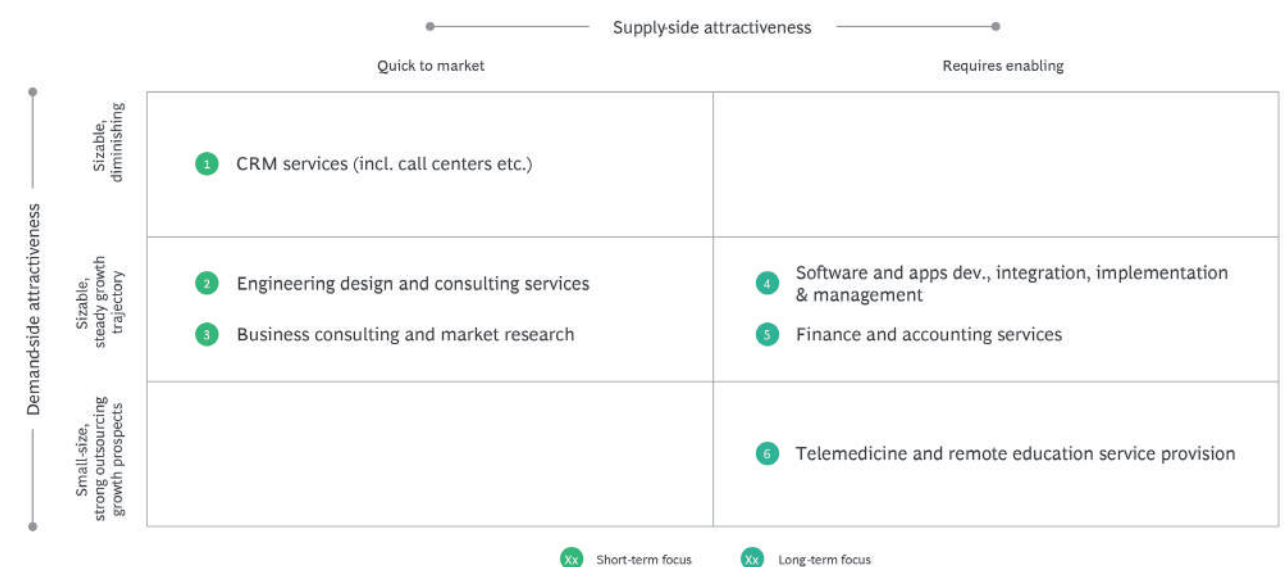
The identified areas of focus were then further prioritized in terms of importance and timing (Figure 56).

An assessment of labor abundance and qualifications highlights potential ways to further enable the labor force.

Figure 56 - Jordan areas of focus prioritization



Three short and three long-term areas of focus identified



Short-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Customer Relationship management (including call centers)	1. Various population segments (including disadvantaged communities) can receive quick skilling and upskilling to occupy CRM jobs	1.1 Encourage specific population segments to obtain micro certifications in CRM tools and enroll in short courses on soft skills
Engineering design and consulting services	2. Only one globally ranked engineering program in Jordan	2.1 Intervene with policymakers to enhance tertiary education engineering programs (curriculums, quality of instructors, etc.)
	3. Experienced professionals are qualified but can benefit from further distinction	3.1 Encourage experienced professionals to obtain certifications in emerging/ niche fields
	4. Fresh graduates are qualified but lack “real-life” work experience	4.1 Enable internships and development of soft and multidisciplinary skills for new graduates
Business consulting and market research	5. Fresh graduates are qualified but lack “real-life” work experience	5.1 Enable Internships and development of soft and multidisciplinary skills for new graduates 5.2 Promote career guidance for fresh graduates, highlighting opportunities in business consulting and market research related fields

Long-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Software and apps development, integration, implementation & management	1. Labor not too abundant (only ~1.2% of the population working in the ICT sector)	1.1 Intervene with policymakers to promote the expansion of existing or launching of new tertiary education programs in relevant fields 1.2 Promote career guidance for fresh graduates, highlighting opportunities in software and app development related fields 1.3 Encourage relevant workforce segments (with high similarities to jobs in software and app development fields) to obtain certifications and become eligible to occupy jobs in the software and app development fields
	2. Experienced professionals are qualified but certifications in the field are a significant plus	2.1 Encourage experienced professionals to obtain certifications
	3. Fresh graduates are qualified but lack “real-life” work experience	3.1 Enable internships and development of soft and multidisciplinary skills for new graduates
Finance and accounting services	4. Only one globally ranked finance and accounting program in Jordan	4.1 Intervene with policymakers to enhance tertiary education engineering programs (curriculums, quality of instructors, etc.)
	5. Fresh graduates’ attractiveness lagging (as compared to global finance and accounting graduates)	5.1 Enable internships and development of soft and multidisciplinary skills for new graduates
Telemedicine and remote education service provision	6. Medical doctors and teacher require skill-ing and upskilling on remote interactions	6.1 Encourage experienced medical practitioners to obtain certifications in tele medicine 6.2 Encourage experienced teachers to obtain certifications in remote tutoring

6.4 Skilling, upskilling and re-skilling recommendations

Key skilling, upskilling and re-skilling initiatives (Figures 56-61) will increase the workforce’s attractiveness and further enable its potential to fill offshore outsourced jobs.

For Jordan’s short-term focus areas, these initiatives include (Figures 57-59):

- Customer relationship management: non-certified short-courses and micro-certifications
- Engineering design and consulting services: interventions with policy makers, internship opportunities, non-certified short-courses, and micro-certifications
- Business consulting and market research: internship opportunities, non-certified short-courses, micro-certifications, and formal and non-formal career guidance

Figure 57 - CRM services recommendations



Figure 58 - Engineering design and consulting services recommendations

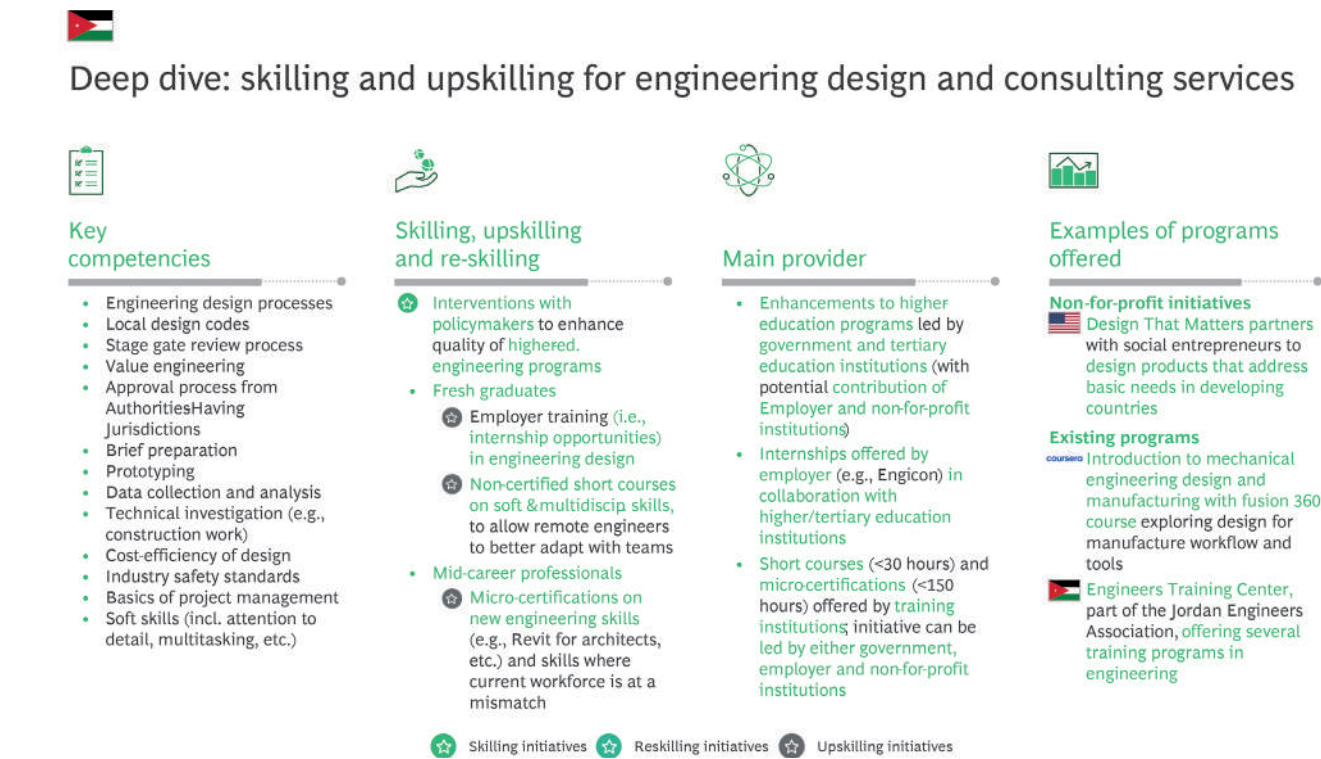


Figure 59 - Business consulting and market research recommendations



- For the country's long-term focus areas, skill building initiatives include (Figures 60-62):
- Finance and accounting services: internship opportunities, non-certified short courses, and certified programs
 - Software and app development: interventions with policy makers, formal and non-formal career guidance, certified programs, and non-certified short courses
 - Telemedicine and remote education: certified programs

Figure 60 - Software and app development recommendations

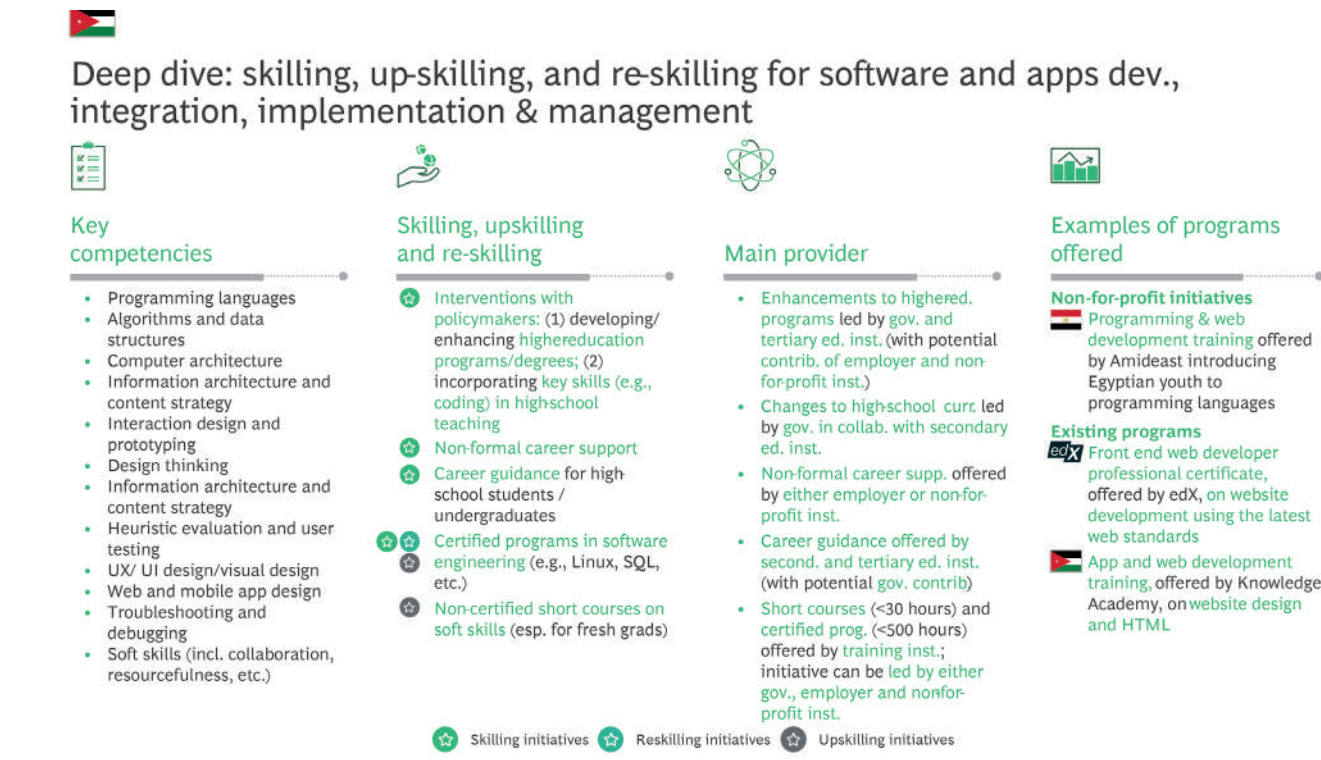


Figure 61 - Finance and accounting services recommendations



Deep dive: upskilling for finance and accounting services



Figure 62 - Telemedicine and remote education recommendations



Deep dive: upskilling for telemedicine and remote education service provision



Source: 1. Food and Agriculture Organization

07 Iraq - A potential outsourcing hub for basic offshore jobs

7.1 Baseline

Iraq is one of the easternmost countries in the Arab world, sitting at the same latitude as the southern United States (Figure 63). The country is bordered to the north by Turkey, to the east by Iran, to the west by Syria and Jordan, and to the south by Saudi Arabia and Kuwait. Iraq's economy has been struggling over the past few years but has been gradually recovering from the impact of the COVID-19 pandemic and the collapse in oil prices in 2020.

7.1.1 CURRENT OUTSOURCING SUPPLY LANDSCAPE

Today, Iraq provides all types of outsourcing: BPO, ITO, and KPO. However, most outsourcing services are predominantly offered to local players inside the Iraqi market. Some global providers have established themselves in the country (e.g., Extensya for CRM services; EY and Deloitte for finance and accounting services); however, their size is relatively small (~20-100 employees for each player).

7.1.2 JOB MATCHING PLATFORMS FOR OUTSOURCED AND OFFSHORE JOBS

Both local and regional platforms are available for Iraqi freelancers and job seekers:

- Local job matching platforms include KodoJobs and Hawajobs
- Regional platforms include Bayt, GulfTalent, Silatech, and Tanqeeb

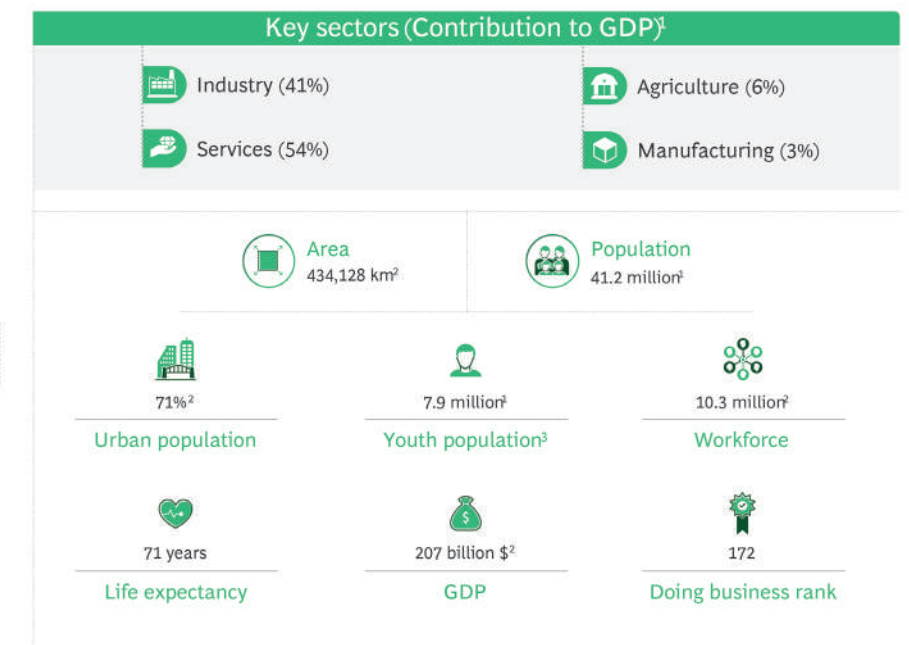
7.2 Value proposition and talent pool

The five key pillars for a successful job outsourcing talent ecosystem were assessed to identify Iraq's value proposition and competitive advantages (see table below, and further details in the appendix section 12.7) In summary, Iraq has potential to evolve into a talent supply hub for basic offshore jobs, mainly driven by its cost competitive

Figure 63 - Overview of Iraq



Iraq at a glance



Source: 1. In 2020; 2. In 2021; 3. 15-24 years old

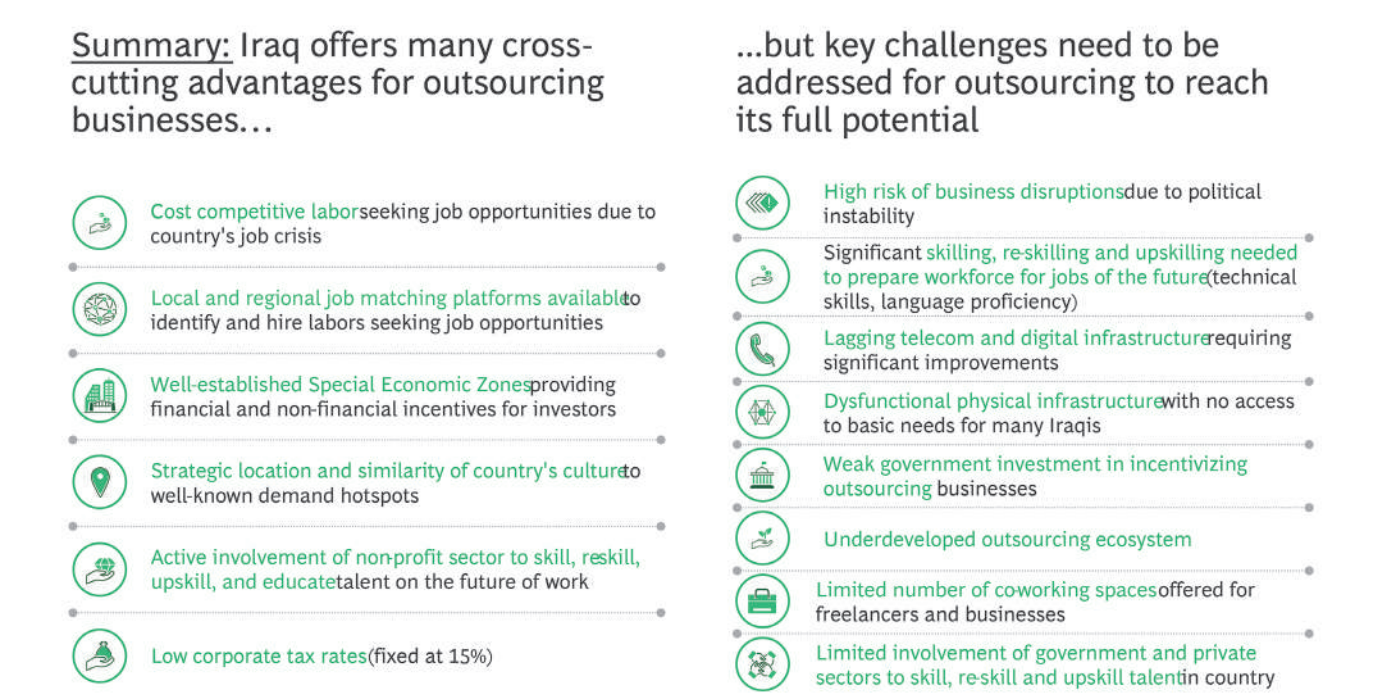
PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none"> Low access to education (~3M children out of school and only ~19% of college-age population has access to tertiary education compared to 32% in Tunisia, 34% in Jordan, and 39% in Morocco) ~60% of youth lacking essential digital skills Very few renowned universities such as the University of Baghdad, which ranks in top 30 in Arab region and top 1,000 worldwide 	Lagging
	Language proficiency	<ul style="list-style-type: none"> Decent proficiency in English, the only compulsory foreign language taught in Iraqi schools 	Medium
	Labor availability	<ul style="list-style-type: none"> Abundance of job-seeking Iraqis as Iraq has one of region's lowest employment-to-total population ratios 25% of working-age population being underutilized (either unemployed or underemployed) 25%+ of tertiary education graduates unemployed or inactive in labor market 	Strong
	Labor cost	<ul style="list-style-type: none"> Cost-competitive labor (e.g., graduate software engineers in Iraq earn an average annual salary of ~ \$10,000 – relatively low compared to peers such as Tunisia) 	Strong
Market environment	Political stability	<ul style="list-style-type: none"> High political risk score, among the highest in MENA and globally 	Lagging
	Economic stability	<ul style="list-style-type: none"> Medium economic risk score, with GDP growing at 1.3% and inflation rate of ~6% in 2021 	Medium
	Proximity to well-known demand hot spots	<ul style="list-style-type: none"> Strategically located close to well-known regional and global demand hot spots (e.g., GCC, Europe) 	Strong
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none"> Bilingual qualified labor and large diaspora bridging the cultural gap between Iraq and the other Arab, European, and American countries 	Strong

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> Low internet penetration rate (50% versus global of 63%) Lagging telecom infrastructure due to damages from the wars and complications for operators to deploy LTE services Limited fiber internet coverage 	Lagging
	Digital maturity levels	<ul style="list-style-type: none"> Ranks low in the GovTech Maturity Index 	Lagging
	Physical infrastructure readiness	<ul style="list-style-type: none"> Lack of access to adequate electricity for basic needs Low, unequal, and inconsistent quality of water and sanitation services Fragmented transport system 	Lagging
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Limited number of co-working spaces with adequate infrastructure 	Medium
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Some financial and non-financial incentives for foreign investors Corporate income taxes fixed at 15% 	Medium
	Special economic zones' availability	<ul style="list-style-type: none"> 4 official free zones offering incentives such as customs duties and VAT exemption More zones under development to boost economic cooperation (e.g., joint zone with Jordan) 	Strong
	Data and IP protection laws	<ul style="list-style-type: none"> No data protection law IP laws in penal code 	Medium
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Weak government involvement in enabling easy set-up of outsourcing businesses (e.g., Free Trade Agreements with key MENA countries are currently suspended, pending review by the government) 	Medium
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Some degree of investment in skilling, re-skilling and upskilling talent, but initiatives not comprehensive or inclusive (e.g., low access for youth and women in under-served areas) 	Medium
	Private sector efforts	<ul style="list-style-type: none"> Insufficient supply of formal trainings offered to employees Some large firms offering opportunities to skill, re-skill and upskill Iraqi talent (e.g., Zain Iraq, Asiacell) 	Medium
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Multiple initiatives launched to skill, re-skill and upskill talent across key capabilities, including digital and technology 	Strong

labor force, operational Special Economic Zones, and low corporate tax rates (Figure 64). However, critical challenges, including political risks and lagging telecom and physical

infrastructures, may threaten the country’s outsourcing prospects and lower the workforce’s attractiveness.

Figure 64 - Iraq’s advantages and challenges



7.3 Recommendations on areas of focus

Despite the critical challenges that the country is facing, Iraq’s abundant and cost competitive labor force enable it to evolve into a talent supply hub for four areas of focus, all related to basic outsourcing work.

For additional details on talent abundance and qualifications, please refer to section 12.7.2 in the appendix.

These areas of focus were further prioritized in terms of importance and timing (Figure 65).

AREAS OF FOCUS	KEY FINDINGS
Customer relationship management (including call centers)	Advantages: <ul style="list-style-type: none">Abundant bilingual talent to conduct basic BPO workLow average salaries compared to GCC countries
Human resource management	<ul style="list-style-type: none">Minimal and low-cost skilling, re-skilling and upskilling required for talent, including the unemployed, making them attractive to potential employers
Content and document processing	Potential Drawbacks: <ul style="list-style-type: none">High risk of business disruptions due to political instabilityLagging telecom and digital infrastructure requiring significant improvementsDysfunctional physical infrastructure with no access to basic needs for many Iraqis
IT consulting and support	<ul style="list-style-type: none">Weak government investment in incentivizing outsourcing businesses

Figure 65 - Iraq areas of focus prioritization



Short-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Customer Relationship management (including call centers) Content and document processing	1. Labor requires upskilling to occupy CRM and content and document processing jobs, due to low digital proficiency of population (~60% of youth lack basic digital skills for employment)	1.1 Intervene with policymakers to increase participation rates in secondary and tertiary education (to improve population’s digital proficiency) 1.2 Encourage specific population segments to obtain micro certifications in CRM tools and enroll in short courses on soft skills
	2. Population’s English proficiency is slightly lagging	2.1 Encourage various population segments to enroll in short English courses

Long-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Software and apps development, integration, implementation & management	1. Labor requires upskilling to occupy human resource management jobs	1.1 Intervene with policymakers to increase participation rates in secondary and tertiary education (to improve population's digital proficiency) 1.2 Encourage specific population segments to obtain certifications in HRM and enroll in short courses on soft skills
	2. Population's English proficiency is slightly lagging	2.1 Encourage various population segments to enroll in short English courses
	3. Fresh graduates are qualified but lack "real-life" work experience	3.1 Enable internships and development of soft and multidisciplinary skills for new graduates 3.2 Promote career guidance for fresh graduates, highlighting opportunities in human resources fields
Finance and accounting services	4. Labor requires upskilling to occupy IT consulting and support jobs, due to low digital proficiency of population (~60% of youth lack basic digital skills for employment)	4.1 Intervene with policymakers to increase participation rates in secondary and tertiary education (to improve population's digital proficiency) 4.2 Encourage specific population segments to obtain IT support certifications and enroll in short courses on soft skills

An assessment of labor abundance and qualifications highlights potential ways to further enable Iraq's labor force.

7.4 Skilling, upskilling and re-skilling recommendations

Key skilling, upskilling and re-skilling initiatives (Figures 65-68) will increase the workforce's attractiveness and further enable its potential to fill offshore outsourced jobs.

For Iraq's short-term focus areas, these initiatives include (Figures 66-67):

- Customer relationship management: interventions with policy makers, non-certified short-courses, and micro-certifications
- Content and document processing: interventions with policy makers and non-certified short courses

Figure 66 - CRM services recommendations



Figure 67 - Content and document processing recommendations



For the country's long-term focus areas, skill building initiatives include (Figures 68-69):

- Human resource management: internship opportunities, formal and non-formal career guidance, non-certified

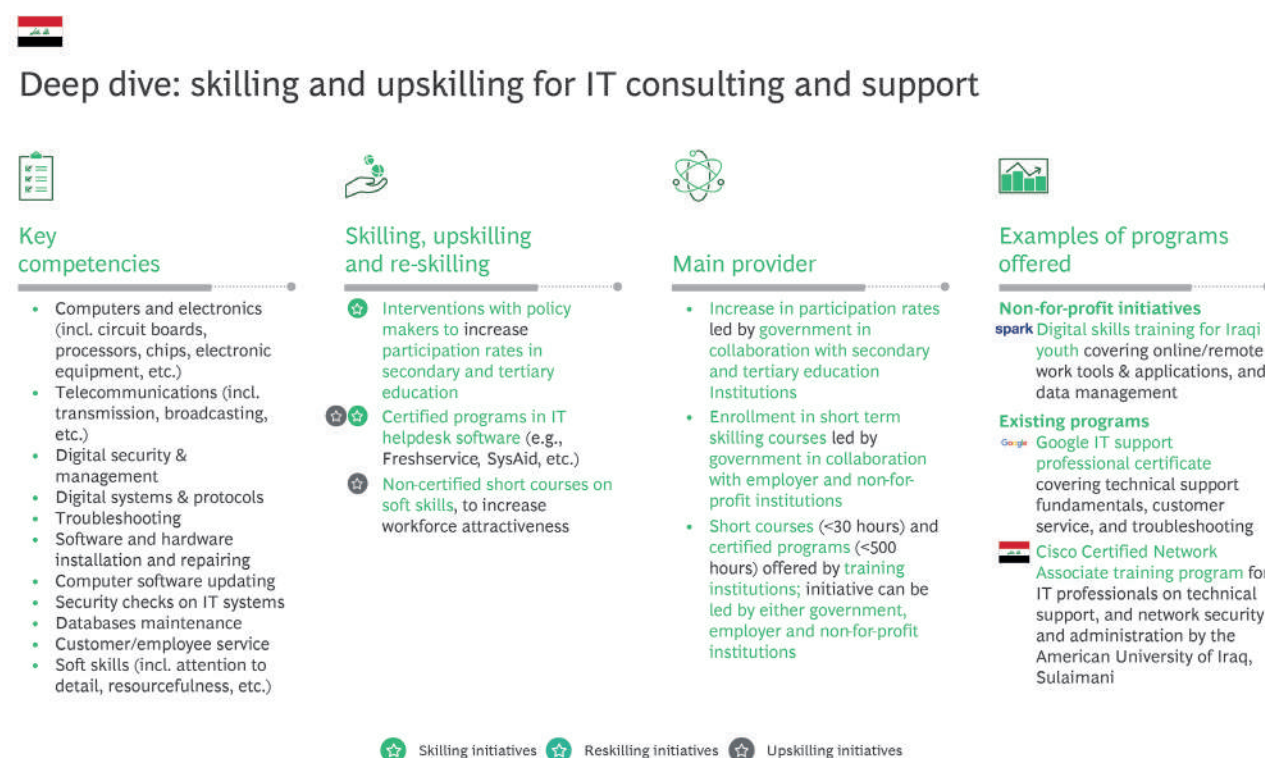
short courses, and certified programs

- IT consulting and support: interventions with policy makers, non-certified short courses, and certified programs

Figure 68 - Human resource management recommendations



Figure 69 - IT consulting and support recommendations



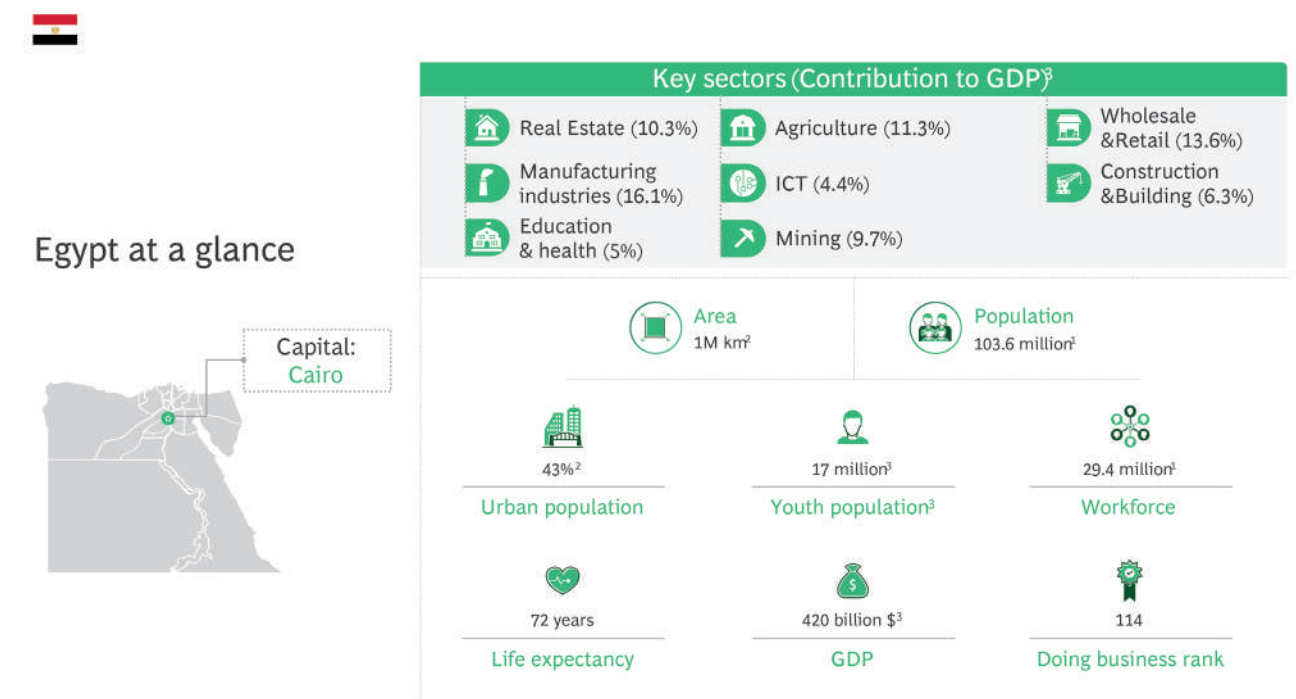
08 Egypt - An outsourcing hub with creative strengths

8.1 Baseline

The Arab Republic of Egypt is the largest country in the Arab world by size of population (Figure 70). Strategically situated in the Gulf of Aqaba, Egypt is located in the north-east of Africa with an Asian extension in the Sinai Peninsula. The country is bordered by the Mediterranean Sea to

the north, Sudan in the South, the Red Sea to the East and Libya in the West. To recover from the recent economic crisis that hit the country and in response to global challenges (e.g., COVID-19 pandemic), Egypt undertook several reforms (e.g., exchange rate, monetary and fiscal measures), enabling it to achieve a surge in economic activity.

Figure 70 - Overview of Egypt



Source: 1. In 2022; 2. In 2021; 3. In 2020; 4. 15-24 years old

8.1.1 CURRENT OUTSOURCING SUPPLY LANDSCAPE

Egypt is already a global outsourcing hub for ITO, BPO, and KPO, with many regional and global companies established in the country. It is the 12th most popular offshoring destination globally and 1st in the MENA

region. Egypt is a leader in BPO outsourcing, with 17% of the global market share.

In total, more than 2,000 companies employing nearly 240,000 people operate in the ITO, BPO, and KPO sectors.

8.1.2 JOB MATCHING PLATFORMS FOR OUTSOURCED AND OFFSHORE JOBS

Local job matching platforms have been established to connect Egyptian talent with global clients:

- Inploy, a platform that connects Egyptian freelancers in over 30 skill domains to global companies and clients seeking specialized services

- Alharefa, a freelancing platform connecting talent to regional and global businesses, and aiming to showcase Egyptian talent on the global stage

8.2 Value proposition and talent pool

The five key pillars for a successful job outsourcing talent ecosystem were assessed to identify Egypt’s value proposition and competitive advantages (see table below, and further details in the appendix section 12.8).

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">• Largest education system in the MENA region• Home to world-class universities that rank in the top 15 in Arab region• Ranks 130th in quality of education and 122nd in quality of math and science education, relatively low compared to peers (e.g., Lebanon)	Medium
	Language proficiency	<ul style="list-style-type: none">• Ranks low in English Proficiency Index; however, most educated Egyptians are bilingual (35% of Egyptians use English as a second language)	Medium
	Labor availability	<ul style="list-style-type: none">• Ranks 84th in 2021 Global Talent Competitiveness Index and 62nd out of 134 countries in ease of finding skilled employees• Qualified labor readily available – high unemployment among university graduates (15.7%)	Strong
	Labor cost	<ul style="list-style-type: none">• Highly cost competitive labor, ranks 1st in regional ecosystem’s affordability of talent• Up to 60% labor cost savings compared to nearshore locations such as Bulgaria, Romania or Poland	Strong
	Political stability	<ul style="list-style-type: none">• Medium political risk score	Medium
Market environment	Economic stability	<ul style="list-style-type: none">• Medium economic risk score, with GDP growing at a CAGR of 17% and inflation rate of 13.15%• Risk offset by (1) the new economic development plan, “Vision 2030”, launched to accelerate economic growth; and (2) a large startup ecosystem, the 4th largest in Africa	Strong
	Proximity to well-known demand hot spots	<ul style="list-style-type: none">• Strategically located close to well-known regional and global demand hot spots (e.g., GCC, Europe)	Strong
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none">• Bilingual educated and qualified labor and large diaspora bridging the cultural gap between Egypt and the other Arab, European, and American countries	Strong

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none">• Decent internet penetration rate, higher than global rate (72% versus global of 63%)• Well-established fiber-optic network, currently being extended to rural areas	Strong
	Digital maturity levels	<ul style="list-style-type: none">• Ranks high in the GovTech Maturity Index• Ranks 64th in 2020 Global Connectivity Index	Strong
	Physical infrastructure readiness	<ul style="list-style-type: none">• Relatively developed infrastructure with high access to electricity (100% of population) and safe drinking water (~90% of population)• Ranks 28th globally (out of 141) for quality of road infrastructure• Public transport sector facing challenges in terms of availability and quality	Medium
	Access to working stations equipped for remote work	<ul style="list-style-type: none">• Abundant co-working spaces with proper infrastructure available for businesses and freelancers	Strong
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none">• Several financial and non-financial incentives (e.g., exemptions, legal safeguards, ease of transfer of capital and profits) offered to local and foreign investors in key sectors• Corporate income taxes fixed at 22.5%, relatively high compared to peers (e.g., Jordan, Lebanon)	Strong
	Special economic zones’ availability	<ul style="list-style-type: none">• Well-established system with various zones located in strategic positions across the country, offering a series of incentives (e.g., tax and customs duties exemptions)	Strong
	Data and IP protection laws	<ul style="list-style-type: none">• Strong data protection laws reflecting European General Data Protection Regulation (GDPR)• Intellectual property rights (IPR) requiring updates and refinements	Medium
	Regulations governing job outsourcing	<ul style="list-style-type: none">• Limited involvement of government in enabling easy outsourcing business set-up (e.g., New Investment Law to ease establishment of outsourcing services introduced and 115 bilateral trade agreements signed; however, only 72 put into force)	Medium

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Strong government investment in skilling, re-skilling and upskilling talent in ICT related specializations Several government-led initiatives launched to provide technical training to talent (e.g., Ministry of Communications providing training courses in digital skills) 	Strong
	Private sector efforts	<ul style="list-style-type: none"> Insufficient supply of formal trainings offered to employees Partnerships established between private sector entities (e.g., Microsoft) and government to skill, re-skill and upskill young people through training on digital programming 	Medium
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Multiple initiatives launched to skill, re-skill and upskill talent across key capabilities, including digital and technology 	Strong

In summary, Egypt has significant potential to further evolve as a talent supply hub for offshore jobs, mainly driven by its qualified and cost-competitive labor force, attractive market environment and digital and physical

infrastructure (Figure 71). However, challenges, including limited government involvement in facilitating the set-up of outsourcing businesses and outdated IP protection laws, may threaten the country’s outsourcing prospects.

Figure 71 - Egypt’s advantages and challenges



8.3 Recommendations on areas of focus

Thanks to a qualified and cost-competitive labor force, Egypt has strong potential to become a talent supply hub for offshore jobs across six areas of focus.

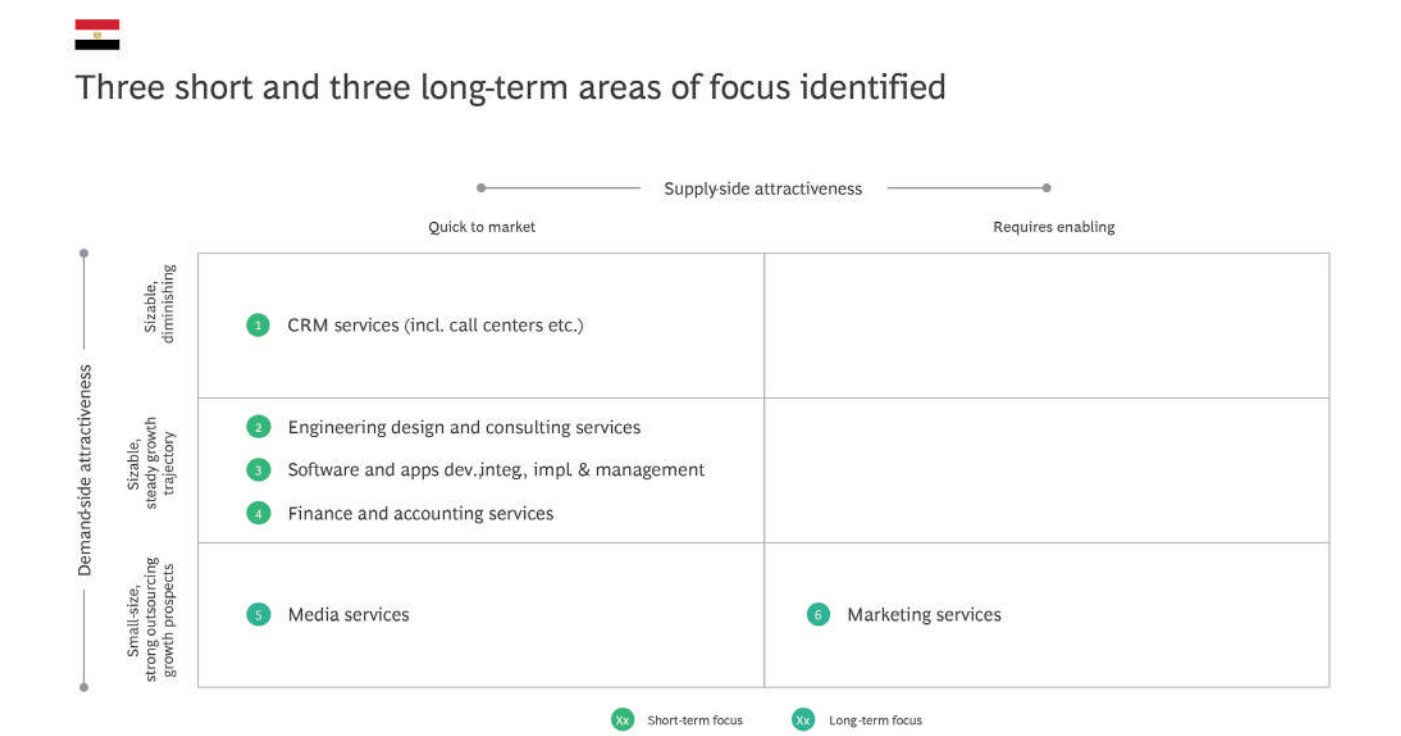
For additional details on talent abundance and qualifications, please refer to section 12.8.2 in the appendix.

The identified areas of focus are further prioritized in terms of importance and timing (Figure 72).

AREAS OF FOCUS	KEY FINDINGS
Customer relationship management (including call centers)	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant, bilingual, and cost competitive talent Minimal skilling, re-skilling and upskilling required for talent to perform CRM jobs Existence of strong CRM global players (e.g., Majorel) High unemployment in population with low educational attainment
Engineering design and consulting services	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant labor Qualified engineering and architecture graduates and experienced professionals Low average salaries compared to GCC countries Well-developed ecosystem for large engineering consulting and real-estate development firms serving local and regional clients (e.g., EGECE Group and Palm Hills Developments)
Software and apps development, integration, implementation and management	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant labor Qualified software and computer engineering graduates and experienced professionals Low average salaries (up to 60% less compared to leading outsourcing countries such as Romania) Well-developed ecosystem with global players (e.g., Microsoft) Large ITO sector valued at \$4.9B (CAGR of 13%) Data protection laws in place Advanced telecom infrastructure and high digital maturity <p>Potential drawbacks:</p> <ul style="list-style-type: none"> IP protection laws need refining/ updating
Finance and accounting services	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant labor Qualified accounting graduates and experienced professionals Low average salaries compared to peers (e.g., Morocco) Well-developed ecosystem with notable players (e.g., KPMG) and a growing FinTech scene (~110 FinTech startups) Advanced telecom infrastructure and high digital maturity

AREAS OF FOCUS	KEY FINDINGS
Media services	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant labor Qualified media experienced professionals Region’s biggest and most productive film and media industry Similarity of cultures with GCC and other Arab countries Geographical proximity to regional and global demand hot spots Advanced telecom infrastructure and high digital maturity Access to co-working spaces with proper infrastructure <p>Potential drawbacks:</p> <ul style="list-style-type: none"> Qualifications of fresh graduates lagging (Egyptian media university programs do not appear on list of top programs worldwide)
Marketing services	<p>Advantages:</p> <ul style="list-style-type: none"> Medium abundance of fresh graduates and experienced professionals Qualified marketing graduates and experienced professionals Strong marketing ecosystem with over 500 well-established marketing agencies supporting local and regional companies Advanced telecom infrastructure and high digital maturity Access to co-working spaces with proper infrastructure

Figure 72 - Egypt areas of focus prioritization



An assessment of labor abundance and qualifications highlights potential ways to further enable the labor force.

Short-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Customer Relationship management (including call centers) Content and document processing	1. Various population segments (including disadvantaged communities) can receive quick skilling and upskilling to occupy CRM jobs	1.1 Encourage specific population segments to obtain micro certifications in CRM tools and enroll in short courses on soft skills
Engineering design and consulting services	2. Experienced professionals are qualified but can benefit from further distinction 3. Fresh graduates are qualified but lack “real-life” work experience	2.1 Encourage experienced professionals to obtain certifications in emerging/ niche fields 3.1 Enable internships and development of soft and multidisciplinary skills for new graduates
Software and apps development, integration, implementation and management	4. Experienced professionals are qualified but certifications in the field are a significant plus 5. Fresh graduates are qualified but lack “real-life” work experience	4.1 Encourage experienced professionals to obtain certifications 5.1 Enable internships and development of soft and multidisciplinary skills for new graduates
Finance and accounting services	6. Fresh graduates are qualified but lack “real-life” work experience	6.1 Enable internships and development of both technical (via accounting and book keeping certifications), soft and multidisciplinary skills for new graduates

Long-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Media services	1. 1. Fresh graduates’ attractiveness lagging (no highly ranked media university programs available)	<p>1.1 Intervene with policymakers to enhance tertiary education engineering programs (curriculums, quality of instructors, etc.)</p> <p>1.2 Intervene with policymakers to incorporate key skills (e.g., video editing) in high-school curricula</p> <p>1.3 Enable internships and development of both technical (via media-related certifications), soft and multidisciplinary skills for new graduates</p>

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Marketing services	2. Medium abundance of fresh graduates and experienced professionals	2.1 Intervene with policymakers to promote the expansion of existing or launching of new tertiary education programs in relevant fields 2.2 Promote career guidance for fresh graduates, highlighting opportunities in software and app development related fields
	3. Fresh graduates are qualified but lack “real-life” work experience	3.1 Enable internships and development of soft and multidisciplinary skills for new graduates

8.4 Skilling, upskilling and re-skilling recommendations

Key skilling, upskilling and re-skilling initiatives (Figures 73-78) will increase the workforce’s attractiveness and further enable its potential to fill offshore outsourced jobs.

For Egypt’s short-term focus areas, these initiatives include (Figures 73-76):

- Customer relationship management: non-certified short-courses, and micro-certifications

- Engineering design and consulting services: internship opportunities, non-certified short-courses, and micro-certifications
- Software and app development: internship opportunities, non-certified short courses, and certified programs
- Finance and accounting services: internship opportunities, non-certified short courses, and certified programs

Figure 73 - CRM services recommendations



Source: 1. Including courses on empathy, mindset, successful communication, etc.

Figure 74 - Engineering design and consulting services recommendations

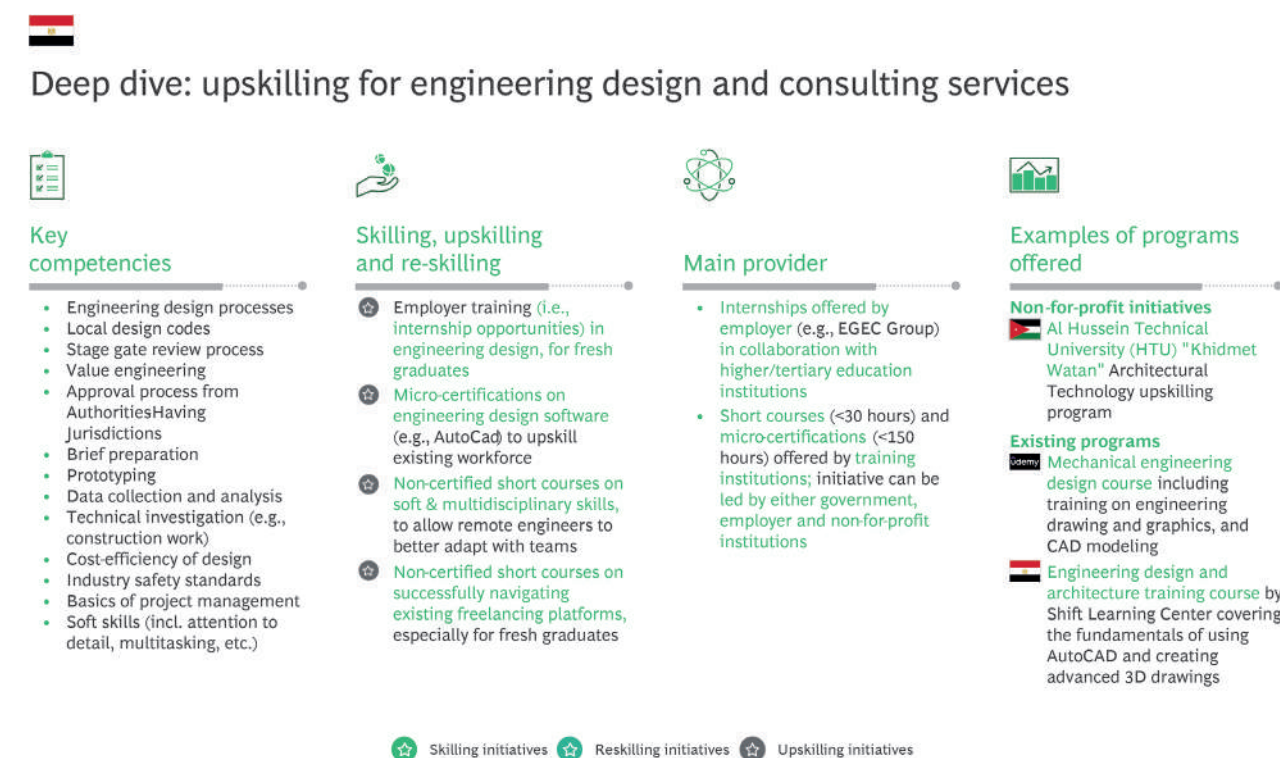


Figure 75 - Software and app development recommendations



Figure 76 - Finance and accounting services recommendations



Deep dive: upskilling for finance and accounting services



For the country's long-term focus areas, skill building initiatives include (Figures 77-78):

- Media services: interventions with policy makers, internship opportunities, non-certified short courses, and micro-certifications

- Marketing services: interventions with policy makers, formal and non-formal career guidance, non-certified short courses, and micro-certifications

Figure 77 - Media services recommendations



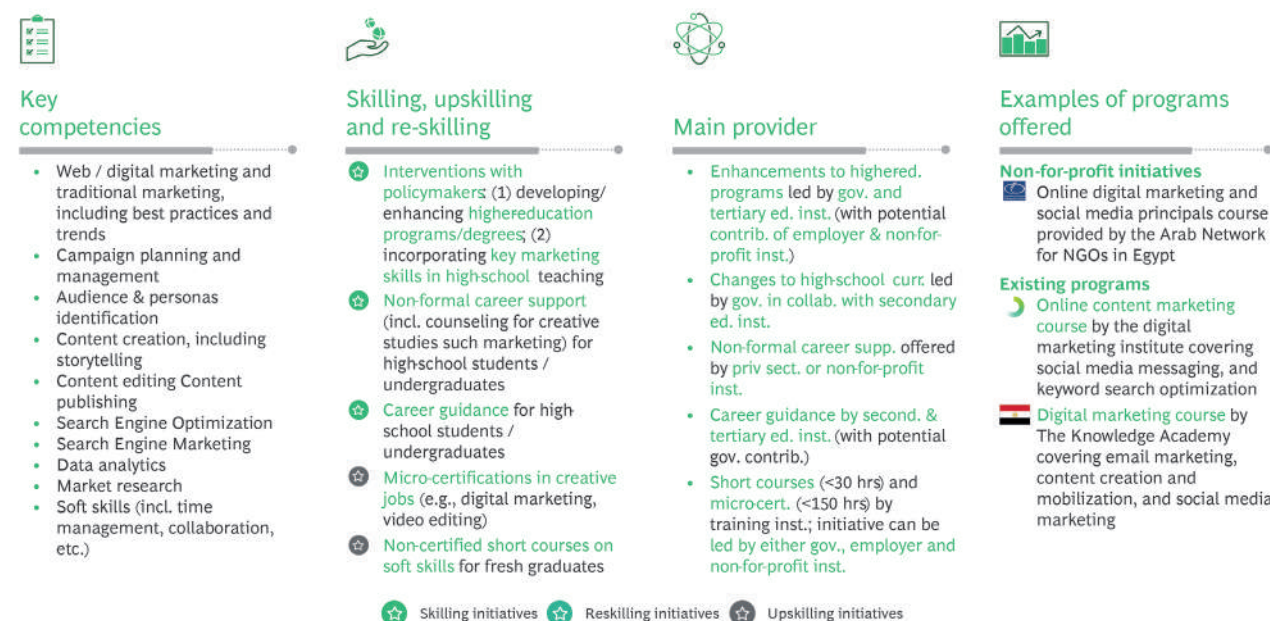
Deep dive: skilling and upskilling for media services



Figure 78 - Marketing services recommendations



Deep dive: skilling and upskilling for marketing services



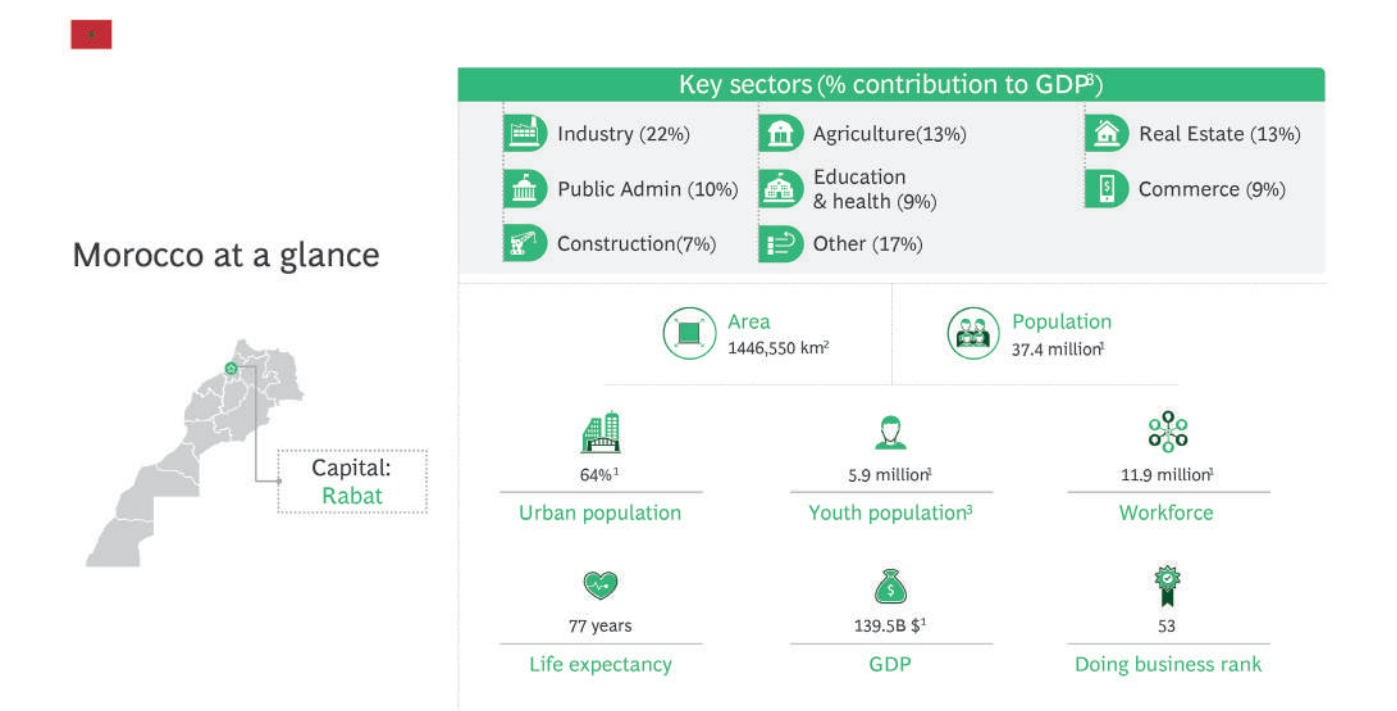
09 Morocco - An outsourcing hub with a well-balanced offering

9.1 Baseline

Morocco is an Arab kingdom located in North Africa (Figure 79). It is bordered to the north by the Mediterranean Sea and to the west by the Atlantic Ocean, with the

Strait of Gibraltar set between these coasts. Over the past few years, Morocco has attempted to reform its economy and strengthen resilience to external shocks by restoring macro-economic balance and cutting subsidies.

Figure 79 - Overview of Morocco



Source: 1. In 2021; 2. 15-24 years old; In 2020

9.1.1 CURRENT OUTSOURCING SUPPLY LANDSCAPE

Morocco is a renowned and fast-growing outsourcing hub, ranked the 40th most popular offshoring destination and 3rd among MENA countries in 2021. Outsourcing is one of the fastest growing sectors in Morocco, with international market presence, making it the number one African destination for the sector.

The outsourcing ecosystem in the country spans ITO, BPO, and KPO. Many international firms outsource their services to Morocco, including Amazon, Deloitte Nearshore, Dell, IBM, hp, Bosch, Accenture, and CGI. The outsourcing sector currently employs more than 120,000 people in the country.

9.1.2 JOB MATCHING PLATFORMS FOR OUTSOURCED AND OFFSHORE JOBS

Local, regional, and international platforms and recruiting agencies are available for Moroccan freelancers and job seekers:

- Local platforms include Alwadifa Maroc and Dreamjob
- Regional platforms include Bayt and GulfTalent

- International platforms include Michael Page and Up-work

9.2 Value proposition and talent pool

The five key pillars for a successful job outsourcing talent ecosystem were assessed to identify Morocco's value proposition and competitive advantages (see table below, and further details in the appendix section 12.9).

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">Low participation rate in tertiary education among population aged 18-22 (37%)Home to very few renowned universities, such as the Université Mohammed V de Rabat (top 90 in Arab region)Ranks 120th in quality of education and 70th in quality of math and science education, relatively low compared to peers (e.g., Lebanon)	Medium
	Language proficiency	<ul style="list-style-type: none">Multilingual country with multiple languages spoken and written (e.g., Arabic, French, English, Spanish)French spoken by ~63% of populationEnglish, widely used in outsourcing business, spoken by only ~14% of population	Medium
	Labor availability	<ul style="list-style-type: none">Ranks 95th in 2021 Global Talent Competitiveness Index and 96th out of 134 countries in ease of finding skilled employeesQualified labor readily available – high unemployment among university graduates (~22%)	Medium
	Labor cost	<ul style="list-style-type: none">Cost competitive labor compared to European countries but relatively expensive compared to regional peers (e.g., Egypt, Jordan, Lebanon)	Medium
	Political stability	<ul style="list-style-type: none">Medium political risk score	Medium
Market environment	Economic stability	<ul style="list-style-type: none">Medium economic risk score, with GDP growing at 7.4% in 2021 and inflation rate of 7.2% in 2022	Strong
	Proximity to well-known demand hot spots	<ul style="list-style-type: none">Strategically located close to well-known regional and global demand hot spots (e.g., GCC, Europe)	Strong
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none">Multilingual population speaking widely used languages (Arabic, French, Spanish, and English), bridging the cultural gap between Morocco and the other Arab, European, and American countries	Strong

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> High internet penetration rate (84% versus global of 63%) One of the most mature telecommunications markets in Africa, offering some of the lowest prices for broadband internet access in the region 	Strong
	Digital maturity levels	<ul style="list-style-type: none"> Ranks high in the GovTech Maturity Index Ranks 60th in 2022 Global Connectivity Index 	Strong
	Physical infrastructure readiness	<ul style="list-style-type: none"> Relatively developed infrastructure with high access to electricity (99.6% of population) and safe drinking water (80% of population) Ranks 41st globally (out of 141) for quality of road infrastructure Government investment in public transport to meet demand of growing urban population 	Strong
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Abundant co-working spaces with proper infrastructure available for businesses and freelancers 	Strong
	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Several financial and non-financial incentives (e.g., exemptions, legal safeguards, ease of transfer of capital and profits) offered to local and foreign investors in key sectors Corporate income taxes fixed at 22.5%, relatively high compared to peers (e.g., Jordan, Lebanon) 	Medium
Regulatory landscape	Special economic zones' availability	<ul style="list-style-type: none"> Well-established system with various zones located in strategic positions across the country, offering a series of incentives (e.g., tax and customs duties exemptions) 	Strong
	Data and IP protection laws	<ul style="list-style-type: none"> Strong data protection laws reflecting European General Data Protection Regulation (GDPR) Intellectual property rights (IPR) requiring updates and refinements 	Medium
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Limited involvement of government in enabling easy outsourcing business set-up (e.g., New Investment Law to ease establishment of outsourcing services introduced and 115 bilateral trade agreements signed; however, only 72 put into force) 	Strong

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Strong government investment in skilling, re-skilling and upskilling talent under the digitization strategy 	Strong
	Private sector efforts	<ul style="list-style-type: none"> Active involvement in developing skilling, re-skilling and upskilling initiatives (e.g., ~20 initiatives, led by 14 private-sector institutions, launched to train talent on digital topic) 	Strong
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Multiple initiatives launched to skill, re-skill and upskill talent across key capabilities, including digital and technology 	Strong

In summary, Morocco has true potential to pursue its growth and become a talent supply hub for offshore jobs, mainly driven by its well-established outsourcing ecosystem, attractive market environment and strong digital and

physical infrastructure (Figure 80). However, challenges, including limited labor availability and cost competitiveness, and weak IP and data protection enforcement, may threaten the country's outsourcing prospects.

Figure 80 - Morocco's advantages and challenges

Summary: Morocco offers many cross-cutting advantages for outsourcing businesses...

- Well-established outsourcing industry across BPO, ITO, and KPO with positive outlook
- Local and regional job matching platforms available to identify and hire labors seeking job opportunities
- Strong investment in talent skilling, reskilling and upskilling by government, private sector, and NGOs
- Strategic location and similarity of country's culture to well-known demand hotspots
- Active involvement of government to increase attractiveness of business landscape
- Well-established system of 5 dedicated business parks facilitating establishment of outsourcing businesses
- Large network of co-working spaces with proper infrastructure (internet, electricity, etc.)
- Advanced telecom infrastructure with strong investment in digital transformation
- Proper physical infrastructure with adequate access to water, electricity, and transportation

...but key challenges need to be addressed for outsourcing to reach its full potential

- Potential risk of business disruptions due to medium political instability
- Some degree of skilling, re-skilling and upskilling needed to prepare workforce for jobs of the future (technical skills, language proficiency)
- Limited access to skilled labor
- High labor cost compared to peers (e.g., Egypt, Jordan, Lebanon)
- Weak IP and data protection enforcement
- High corporate income tax rate (31%) compared to peers

9.3 Recommendations on areas of focus

With a well-established outsourcing ecosystem and an attractive market environment, Morocco has excellent potential to grow as a talent supply hub for offshore jobs across five areas of focus.

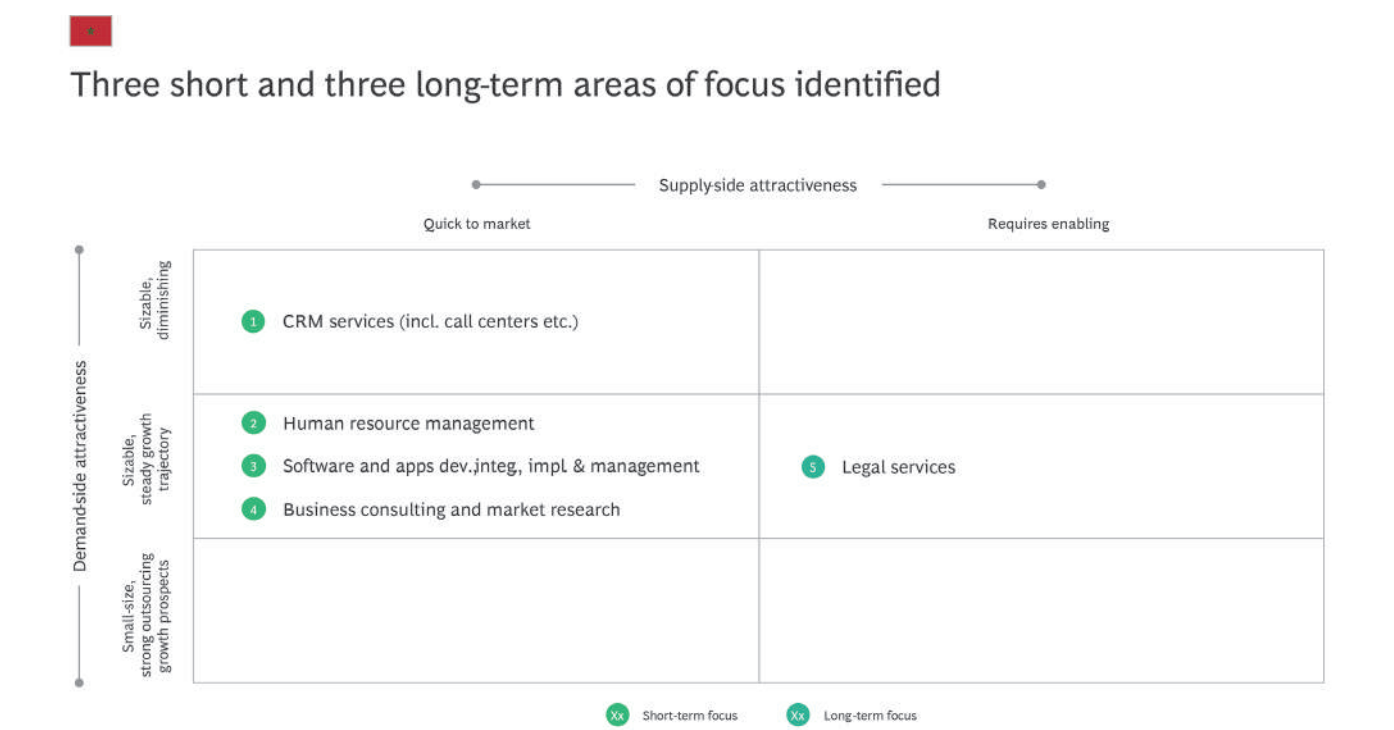
For additional details on talent abundance and qualifications, please refer to section 12.9.2 in the appendix.

The identified areas of focus are further prioritized in terms of importance and timing (Figure 81).

AREAS OF FOCUS	KEY FINDINGS
	<p>Advantages:</p> <ul style="list-style-type: none">Strong CRM outsourcing ecosystem in place, serving markets abroadAbundant talent, proficient in Arabic and FrenchLow average salaries compared to USA and European countriesMinimal and low-cost skilling, re-skilling and upskilling required for talent, including the unemployedPolitical stability with minimal risk of business disruptionProper telecom and digital infrastructure in place <p>Potential drawbacks:</p> <ul style="list-style-type: none">Low proficiency in English, so focus could be on serving French- and Arabic-speaking countries and/or on English language trainingHigh average salaries compared to peers (e.g., Lebanon, Egypt)
Customer Relationship management (including call centers)	
	<p>Advantages:</p> <ul style="list-style-type: none">Existing HR management outsourcing ecosystem in place, serving market abroadAbundant talent, proficient in Arabic and FrenchLow average salaries compared to USA and European countriesArab, European, and African influences part of Morocco’s heritage, making it culturally suitable to serve Arab, European, and African markets <p>Potential drawbacks:</p> <ul style="list-style-type: none">Low proficiency in EnglishHigh average salaries compared to peers (e.g., Lebanon, Egypt)
Human resource management	
	<p>Advantages:</p> <ul style="list-style-type: none">Abundant laborQualified software and computer engineering experienced professionalsLow average salaries compared to European countriesData and IP protection laws in placeProper telecom and digital infrastructure in place, including fiber technologyAccess to co-working spaces with proper infrastructure <p>Potential drawbacks:</p> <ul style="list-style-type: none">Qualifications of fresh graduates lagging (Moroccan software and computer engineering university programs do not appear on list of top programs worldwide)High average salaries compared to peers (e.g., Lebanon, Egypt)Weak enforcement of data and IP protection laws
Software and apps development, integration, implementation and management	

AREAS OF FOCUS	KEY FINDINGS
	<p>Advantages:</p> <ul style="list-style-type: none">Medium abundance of fresh graduates and experienced professionalsQualified talent skilled in problem solving and critical thinkingLow average salaries compared to peers (e.g., Lebanon)Established ecosystem for business consulting and market researchOpportunities to skill, re-skill and upskill fresh graduates via internships in firms that are part of the existing ecosystem <p>Potential drawbacks:</p> <ul style="list-style-type: none">Low proficiency in English
Business consulting and market research	
	<p>Advantages:</p> <ul style="list-style-type: none">Medium abundance of fresh graduates and experienced professionalsQualified, bi-lingual legal services experienced professionalsLow average salaries compared to USA and European countriesEstablished ecosystem with many local law firms operating in field <p>Potential drawbacks:</p> <ul style="list-style-type: none">Qualifications of fresh graduates lagging (Moroccan legal university programs do not appear on list of top programs worldwide)Low proficiency in EnglishHigh average salaries compared to peers (e.g., Egypt)
Legal services	

Figure 81 - Morocco areas of focus prioritization



Short-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Customer Relationship management (including call centers) Content and document processing	1. Labor requires upskilling to occupy CRM and content and document processing jobs, due to low digital proficiency of population (country ranks 88th on basic digital skills)	1.1 Intervene with policymakers to increase participation rates in secondary and tertiary education (to improve population’s digital proficiency) 1.2 Encourage specific population segments to obtain micro certifications in CRM tools and enroll in short courses on soft skills
Human resource management	2.Experienced professionals are qualified but can benefit from further distinction	2.1 Encourage workforce to obtain HRM certifications
	3Population’s English proficiency is slightly lagging	3.1 Encourage relevant workforce segments to enroll in short English courses
	4. Fresh graduates lack “real-life” work experience	4.1 Enable internships and development of soft and multidisciplinary skills for new graduates 4.2 Promote career guidance for fresh graduates, highlighting opportunities in human resources fields
Software and apps development, integration, implementation and management	5. No highly ranked software and app development university programs available in Morocco	5.1 Intervene with policymakers to enhance tertiary education engineering programs (curriculums, quality of instructors, etc.) 5.2 Intervene with policymakers to incorporate key skills (e.g., coding) in high-school curricula
	6. Experienced professionals are qualified but certifications in the field are a significant plus	6.1 Encourage experienced professionals to obtain certifications
	7. Fresh graduates lack “real-life” work experience	7.1 Enable internships and development of soft and multidisciplinary skills for new graduates
Business consulting and market research	8. Fresh graduates are qualified but lack “real-life” work experience	8.1 Enable internships and development of soft and multidisciplinary skills for new graduates 8.2 Promote career guidance for fresh graduates, highlighting opportunities in business consulting and market research related fields

Long-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Legal services	1. No highly ranked law university programs available in Morocco	1.1 Intervene with policymakers to enhance tertiary education law programs (curriculums, quality of instructors, etc.)
	2. Experienced professionals are qualified but certifications in the field are a significant plus	2.1 Encourage experienced professionals to obtain certifications or passing bar exams
	3. Fresh graduates lack “real-life” work experience	3.1 Enable internships and development of soft and multidisciplinary skills for new graduates

9.4 Skilling, upskilling and re-skilling recommendations

Key skilling, upskilling and re-skilling initiatives (Figures 81-85) will increase the workforce’s attractiveness and further enable its potential to fill offshore outsourced jobs.

For Morocco’s short-term focus areas, these initiatives include (Figures 82-85):

- Customer relationship management: interventions with policy makers, non-certified short-courses, and micro-certifications
- Human resource management: internship opportunities, formal and non-formal career guidance, non-certified short-courses, and certified programs
 - Software and app development: interventions with policy makers, internship opportunities, non-certified short-courses, and certified programs
 - Business consulting and market research: internship opportunities, formal and non-formal career guidance, non-certified short-courses, and micro-certifications

Figure 82 - CRM services recommendations

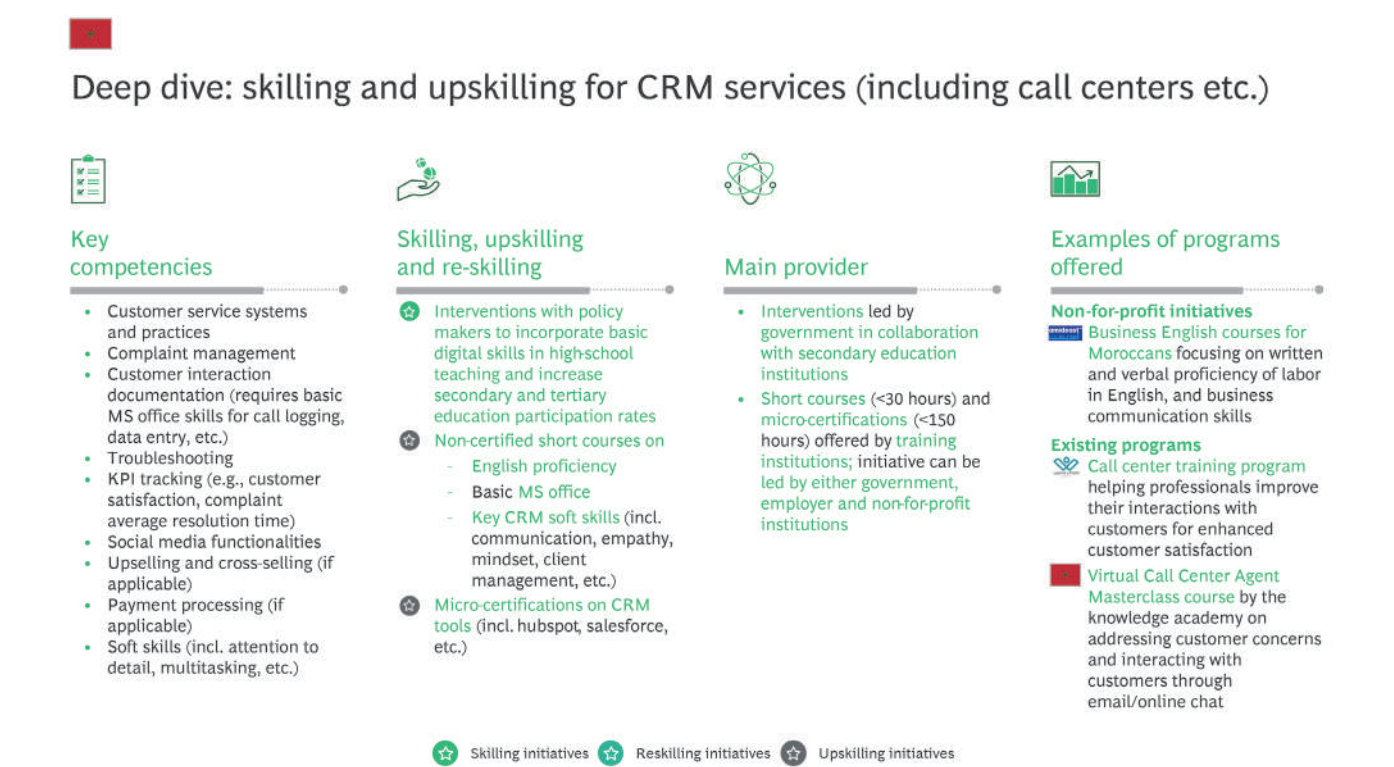


Figure 83 - Human resource management recommendations

Deep dive: skilling and upskilling for human resource management



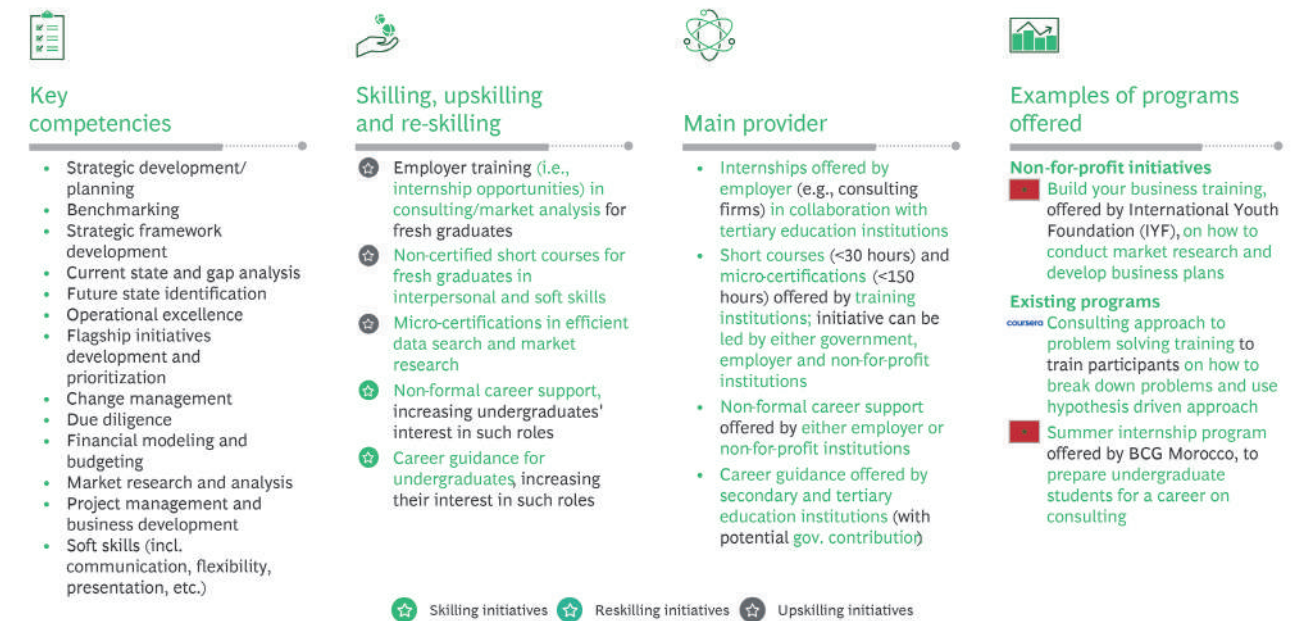
Figure 84 - Software and app development recommendations

Deep dive: skilling and upskilling for software and apps dev., integration, implementation & management



Figure 85 - Business consulting and market research services recommendations

Deep dive: skilling and upskilling for business consulting and market research



For the country's long-term focus area, legal services, skill building initiatives include (Figure 86): interventions with

policy makers, internship opportunities, non-certified short courses, and certified programs

Figure 86 - Legal services recommendations

Deep dive: skilling and upskilling for legal services



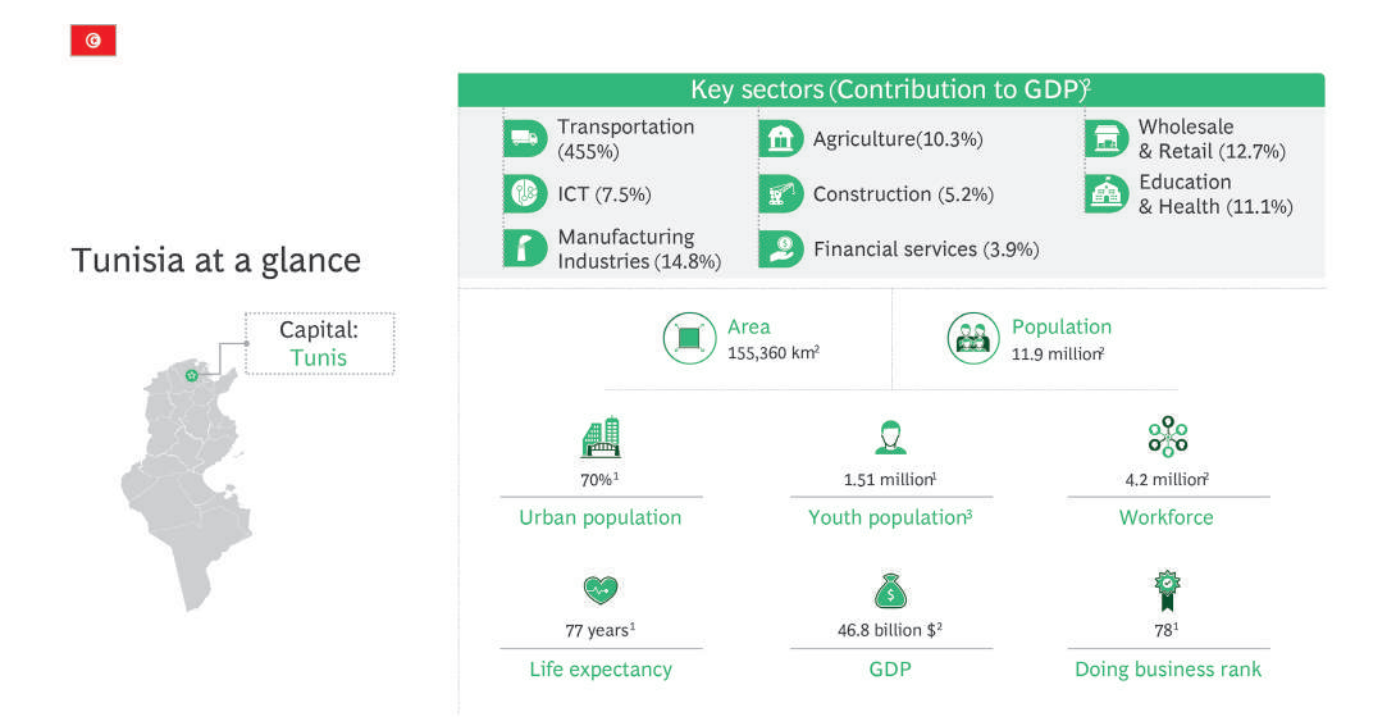
10 Tunisia - An outsourcing with a well-balanced offering

10.1 Baseline

Tunisia is an Arab country located in North Africa (Figure 87). Set between Algeria and Libya, and bordering the

Mediterranean Sea, it is the smallest country in North Africa and in the Maghreb region. The country’s economic outlook is uncertain due to rising inflation, elevated fiscal deficits, and rising public debt.

Figure 87 - Overview of Tunisia



Source: 1. In 2020; 2. In 2021; 3. 15-24 years old

10.1.1 CURRENT OUTSOURCING SUPPLY LANDSCAPE

Tunisia is a renowned hub for BPO, ITO, and KPO. The country is ranked 38th most popular offshoring destination globally and 5th among MENA countries.

Tunisia’s BPO, ITO, and KTO sectors are well developed, involving ~300 foreign companies and more than 60,000 jobs. The country’s BPO sector is quite mature, featuring

leading providers and approximately 350 call centers employing ~22,000 Tunisians.

10.1.2 JOB MATCHING PLATFORMS FOR OUTSOURCED AND OFFSHORE JOBS

Leading regional and global freelance platforms are used by many Tunisian freelancers:

- Zouza, for IT freelancing
- Uprod’it, servicing creative, artistic, and technological fields
- Tasahiil, for all fields (platform includes thousands of reviewed freelancers to select from)

10.2 Value proposition and talent pool

The five key pillars for a successful job outsourcing talent ecosystem were assessed to identify Tunisia’s value proposition and competitive advantages (see table below, and further details in the appendix section 12.10).

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">• 35% of population with university degree, and current participation of 33% in higher education• Only 4 universities rank between 50 and 100 in the Arab region• Ranks 103rd in quality of education and 44th in quality of math and science education, relatively low compared to peers (e.g., Lebanon)	Medium
	Language proficiency	<ul style="list-style-type: none">• Strong pool of bilingual labor, where English is taught to all school students• 28% of population fluent in French	Strong
	Labor availability	<ul style="list-style-type: none">• Ranks 81st in 2021 Global Talent Competitiveness Index and 72nd out of 134 countries in ease of finding skilled employees• Qualified labor readily available – high unemployment among university graduates (~30%)	Medium
	Labor cost	<ul style="list-style-type: none">• Cost competitive labor compared to near-shore locations (e.g., cost savings of up to 50% for computer engineering graduates compared to Bulgaria, Romania, Poland and Germany)	Strong
Market environment	Political stability	<ul style="list-style-type: none">• High political risk score	Lagging
	Economic stability	<ul style="list-style-type: none">• High economic risk score, with GDP growing at 3.3% annually, following a 9.2% contraction in 2020 (largest drop among MENA countries) due to the pandemic, and rising inflation rate of 8.16%	Lagging
	Proximity to demand hot spots	<ul style="list-style-type: none">• Strategically located close to well-known regional and global demand hot spots (e.g., GCC, Europe)	Strong
	Cultural similarity with demand hot spots	<ul style="list-style-type: none">• Multilingual qualified labor speaking Arabic, English, and French, and large number of expatriates, bridging the cultural gap between Tunisia and the other Arab, European, and American countries	Strong

PILLARS	DIMENSIONS	KEY FINDINGS	ASSESSMENT
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> High internet penetration rate (84% versus global of 63%) One of the most mature telecommunications markets in Africa, offering some of the lowest prices for broadband internet access in the region 	Strong
	Digital maturity levels	<ul style="list-style-type: none"> Ranks high in the GovTech Maturity Index Ranks 60th in 2022 Global Connectivity Index 	Strong
	Physical infrastructure readiness	<ul style="list-style-type: none"> Relatively developed infrastructure with high access to electricity (99.6% of population) and safe drinking water (80% of population) Ranks 41st globally (out of 141) for quality of road infrastructure Government investment in public transport to meet demand of growing urban population 	Strong
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Abundant co-working spaces with proper infrastructure available for businesses and freelancers 	Strong
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Several financial and non-financial incentives (e.g., exemptions, legal safeguards, ease of transfer of capital and profits) offered to local and foreign investors in key sectors Corporate income taxes fixed at 22.5%, relatively high compared to peers (e.g., Jordan, Lebanon) 	Medium
	Special economic zones' availability	<ul style="list-style-type: none"> Well-established system with various zones located in strategic positions across the country, offering a series of incentives (e.g., tax and customs duties exemptions) 	Strong
	Data and IP protection laws	<ul style="list-style-type: none"> Strong data protection laws reflecting European General Data Protection Regulation (GDPR) Intellectual property rights (IPR) requiring updates and refinements 	Medium
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Limited involvement of government in enabling easy outsourcing business set-up (e.g., New Investment Law to ease establishment of outsourcing services introduced and 115 bilateral trade agreements signed; however, only 72 put into force) 	Strong
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Strong government investment in skilling, re-skilling and upskilling talent under the digitization strategy 	Strong
	Private sector efforts	<ul style="list-style-type: none"> Active involvement in developing skilling, re-skilling and upskilling initiatives (e.g., ~20 initiatives, led by 14 private-sector institutions, launched to train talent on digital topic) 	Strong
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Multiple initiatives launched to skill, re-skill and upskill talent across key capabilities, including digital and technology 	Strong

In summary, Tunisia exhibits great potential to build on its current momentum and become a thriving talent supply hub for offshore jobs. Success will mainly be driven by its multilingual and cost-competitive labor, well-established

outsourcing ecosystem, attractive regulatory landscape and developed digital and physical infrastructure (Figure 88). However, challenges, including political and economic risks, may threaten the country's outsourcing prospects.

Figure 88 - Tunisia's advantages and challenges

Summary: Tunisia offers many cross-cutting advantages for outsourcing businesses...

- Cost-competitive, trilingual workforce fluent in Arabic, English, and French
- Well-established outsourcing industry across BPO, ITO, and KPO
- Outsourcing job matching platforms available to identify and hire labors for outsourcing purposes
- Strategic location and similarity of country's culture to well-known demand hotspots
- Active involvement of government to increase attractiveness of business landscape (e.g., New Investment Law of 2017)
- Strong incentives in place for outsourcing companies (E.g., Technoparks & Cyberparks easing set up for ITO companies)
- Well-established system of special economic zones providing financial and non-financial incentives for investors
- Data and IP protection laws in place in place (Signatory to World Intellectual Property Organization treaties)
- Advanced telecom infrastructure with strong investment transformation (E.g., Digital Tunisia 2020) digital
- Low corporate tax rate (fixed at 15%) with lower rates for outsourcing companies (10%)

...but key challenges need to be addressed for outsourcing to reach its full potential

- High risk of business disruptions due to political and economic instability
- Some degree of skilling, re-skilling and upskilling needed to prepare workforce for jobs of the future (education)
- Limited access to skilled labor
- Underdeveloped public transportation sector facing multiple challenges
- Limited involvement of private sector to skill, re-skill and upskill talent in country

10.3 Recommendations on areas of focus

Given its multilingual and cost-competitive labor force, and well-established outsourcing ecosystem, Tunisia shows great potential to accelerate its current momentum and

become a talent supply for offshore jobs across four areas of focus.

For additional details on talent abundance and qualifications, please refer to section 12.10.2 in the appendix.

AREAS OF FOCUS	KEY FINDINGS
Customer Relationship management (including call centers)	Advantages: <ul style="list-style-type: none"> Abundant pool of bilingual and cost competitive talent Established CRM ecosystem with strong CRM players (E.g., Transcom) and 350 call centers employing 22,000 Tunisians serving French and English-speaking clients Minimal skilling, re-skilling and upskilling required for talent to perform CRM functions Well-developed telecom infrastructure
	Potential drawbacks: <ul style="list-style-type: none"> Low political stability causing a risk of business disruption

AREAS OF FOCUS	KEY FINDINGS
Content and document processing	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant, and bilingual talent High verbal proficiency in Arabic with literacy rate of ~79% Strong proficiency in English (primary language in Education) and in French (28% of population is fluent in French) Cultural similarity with GCC and other Arab countries Geographical proximity to regional and global demand hot spots Proper telecom and digital infrastructure in urban areas
Software and apps development, integration, implementation and management	<p>Advantages:</p> <ul style="list-style-type: none"> Abundant labor Qualified computer and software engineering experienced professionals Low average salaries compared to alternative outsourcing hotspots (up to 50% less) Fast growing ICT sector with strong investment in digital transformation Strong data and IP protection laws in place Advanced telecom infrastructure with high digital maturity <p>Potential drawbacks:</p> <ul style="list-style-type: none"> Qualifications of fresh graduates lagging (Tunisian software and computer engineering university programs do not appear on list of top programs worldwide)
Engineering design and consulting services	<p>Advantages:</p> <ul style="list-style-type: none"> Medium abundance of fresh graduates and experienced professionals Qualified engineering and architecture experienced professionals Low average wages compared to GCC countries and peers (e.g., Egypt, Jordan) ~70 bachelor programs in engineering are offered in the country with additional development through 30+ engineering training centers <p>Potential drawbacks:</p> <ul style="list-style-type: none"> Qualifications of fresh graduates lagging (Tunisian engineering university programs do not appear on list of top programs worldwide) ~3,000 engineers leaving the country annually in search of better employment opportunities

The identified areas of focus are further prioritized in terms of importance and timing (Figure 89).

An assessment of labor abundance and qualifications highlights potential ways to further enable the labor force.

Figure 89 - Tunisia areas of focus prioritization



Short-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Customer Relationship management (including call centers) Content and document processing	1. Labor requires upskilling to occupy CRM and content and document processing jobs, due to low digital proficiency of population (country ranks 67th on basic digital skills)	1.1 Intervene with policymakers to enhance tertiary education engineering programs (curriculums, quality of instructors, etc.) 1.2 Intervene with policymakers to incorporate key skills (e.g., coding) in high-school curricula
Content and document processing		1.3 Enable internships and development soft and multidisciplinary skills for new graduates

Long-term areas of focus

AREAS OF FOCUS	AREAS REQUIRING IMPROVEMENT	WAY FORWARD
Software and apps development, integration, implementation and management	1. 1. Workforce qualifications less attractive compared to global peers (especially at the fresh graduate level)	1.1 Intervene with policymakers to enhance tertiary education engineering programs (curriculums, quality of instructors, etc.) 1.2 Intervene with policymakers to incorporate key skills (e.g., coding) in high-school curricula 1.3 Enable internships and development soft and multidisciplinary skills for new graduates
Engineering design and consulting services	2. Medium abundance of engineers and architects coupled with a brain drain (decreasing availability of experienced professionals)	2.1 Intervene with policymakers to promote the expansion of existing or launching of new tertiary education programs in relevant fields 2.2 Promote career guidance for fresh graduates, highlighting opportunities in engineering design and consulting related fields
	3. Workforce qualifications less attractive compared to global peers (especially at the fresh graduate level)	3.1 Intervene with policymakers to enhance tertiary education engineering programs (curriculums, quality of instructors, etc.) 3.2 Enable internships and development soft and multidisciplinary skills for new graduates 3.3 Encourage experienced professionals to obtain certifications in emerging/ niche fields

10.4 Skilling, upskilling and re-skilling recommendations

Key skilling, upskilling and re-skilling initiatives (Figures 90-93) will increase the workforce’s attractiveness and further enable its potential to fill offshore outsourced jobs.

For Tunisia’s short-term focus areas, these initiatives include (Figures 90-91):

- Customer relationship management: interventions with policy makers, non-certified short-courses, and micro-certifications
- Content and document processing: interventions with policy makers and non-certified short courses

Figure 90 - CRM services recommendations

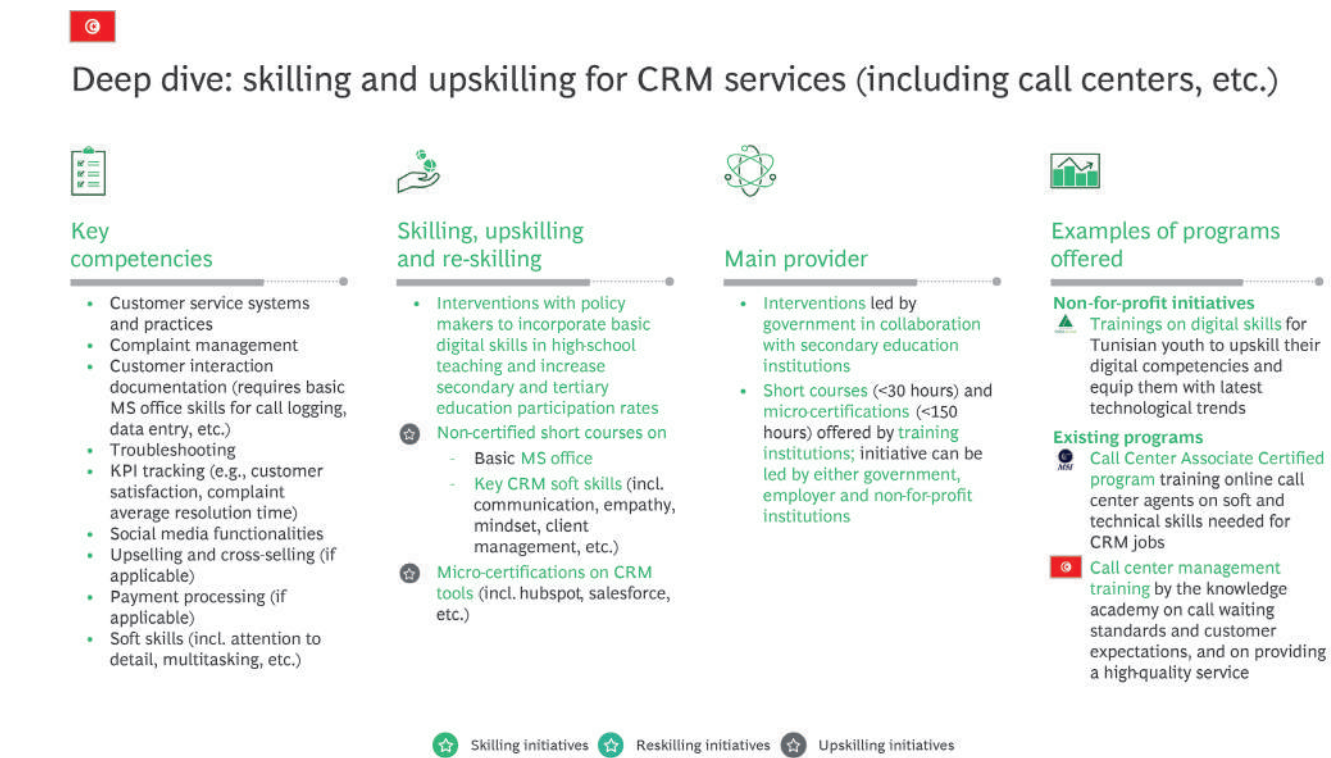


Figure 91- Content and document processing recommendations



For the country's long-term focus areas, skill building initiatives include (Figures 92-93):

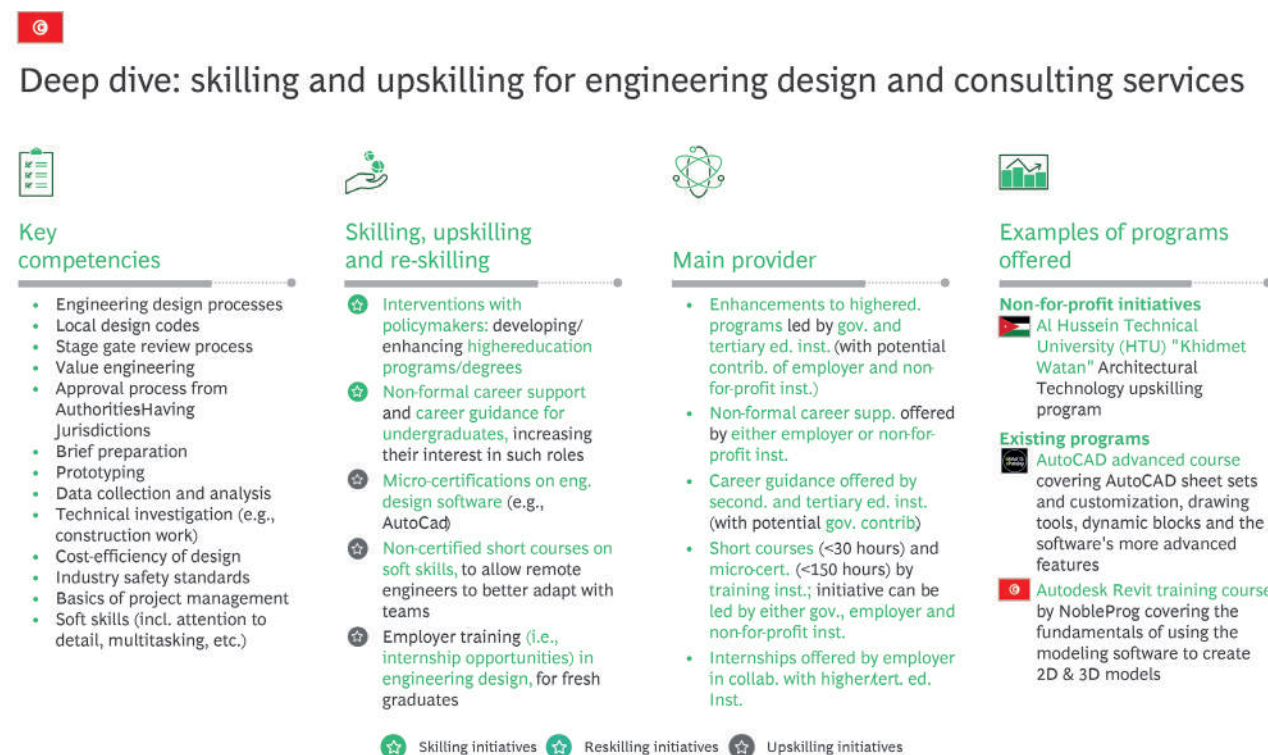
- Software and app development: interventions with policy makers, internship opportunities, non-certified short courses, and certified programs

- Engineering design and consulting services: interventions with policy makers, internship opportunities, formal and non-formal career guidance, non-certified short courses, and micro-certifications

Figure 92 - Software and app development recommendations



Figure 93 - Engineering design and consulting services recommendations



11 Conclusion and closing notes

This study set out to answer two questions:

- What does the future of job outsourcing look like?
- What are potential opportunities for talent supply from developing countries in the MENA region?

It is clear that cross-border job outsourcing is a fast-growing and dynamic field, transforming to meet the demands of global digitalization, and encompassing ever more sophisticated segments of the value chain. As a strategic lever, outsourcing has expanded from simply delivering cost reduction to accessing critical skills amid a widespread qualified talent shortage. The future of job outsourcing is bright, and the potential it offers developing MENA countries is very exciting. This research shows that each country has a unique combination of areas it should focus on and talent and ecosystem gaps to close. However, each of the six countries studied exhibits strong potential to become a talent hub for offshore job outsourcing, with the prospect of substantial employment and economic benefits.

As such, this study results in potential implications for different stakeholder groups across the focus countries that if addressed, can significantly enhance the remote and even the overall labor market ecosystem in each country.

Policymakers should collaborate with educational institutions to expand on and enhance the curriculums and the programs offered across students' educational journeys. They should also put efforts to strengthen local remote work ecosystems by putting forward and implementing initiatives to improve the market, infrastructure, and regulatory landscapes.

Employers and corporate players should lead initiatives to enroll the workforce in relevant trainings and programs and incentivize the local talent to obtain certifications to further increase their efficiency and overall attractiveness in the global labor market. Employers should also ensure provision of adequate internship opportunities for fresh graduates, as part of their contribution to upskilling the future talent and workforce.

Not-for-profit institutions should take into consideration the countries' areas of focus when deciding on beneficiaries, workforce segments, and fields for trainings and programs planned to be launched or designed. Such entities can also greatly influence the higher education and career decisions of students and fresh graduates, by offering career support and guidance, aimed at steering career paths towards areas and fields with highest potential employment opportunities.

This study has provided a strong foundation for building job outsourcing talent hubs in targeted MENA countries. Broadly, there is no question that each of the six countries analyzed could reap social and economic benefits from pursuing this growth opportunity. However, though this study provides insights to various institutional stakeholders (such as policymakers, employers and not-for-profit institutions) and could potentially give rise to tangible impact in terms of talent upskilling and employment opportunities, countries and decision-makers must keep in mind:

- Despite labor being qualified in select areas of focus for many countries, this study provides a snapshot of the labor force qualifications. As such, talent must continuously be skilled, upskilled, and re-skilled to cope with the needs of the constantly and rapidly evolving labor market (as per the WEF, 50% of all employees will need reskilling by 2025).

- There is significant competition across some areas of focus, requiring decision-makers to further investigate the demand potential of certain jobs, and to try and differentiate their workforce's offering to gain further competitive advantages and be perceived as more attractive than other markets to outsource to.

- Despite focus countries currently lacking the foundations to focus on the Infrastructure Management Services and Data and Artificial Intelligence areas. They should, however, plan to enable talent in such emerging and futuristic fields via addressing the various gaps (such as curriculum gaps, lagging digital infrastructure, lacking trainings and programs offered, ecosystem readiness, etc.) preventing them to currently supply talent.

12Appendix

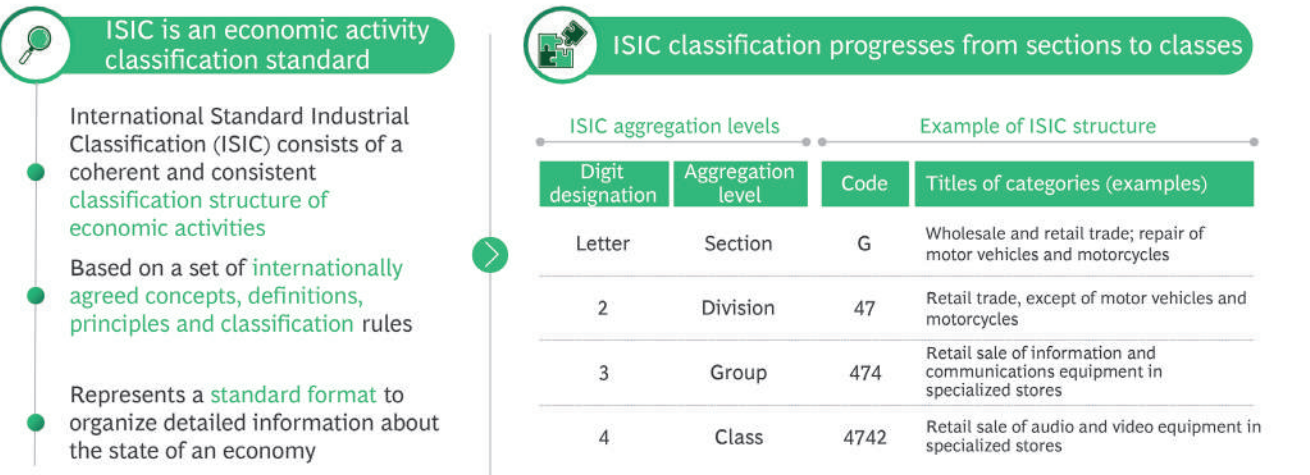
12.1 Jobs and job clusters

One key aspect of this study is to understand the jobs or functions that either have been frequently outsourced or

that have potential to be. Thus, the starting point was to analyze 400+ classes of occupations in the International Standard Industrial Classification (ISIC) (Figure 94).

Figure 94 - International Standard Industrial Classification (ISIC)

ISIC is an economic activity classification standard with 400+ job classes



Three criteria were then defined to shortlist jobs with high potential for outsourcing, regardless of their entity, industry or geography:

- Jobs with high potential for remote work
- Jobs that are commonly and have historically been outsourced
- Jobs in the technology and digital fields, or in creative and niche areas

The 400+ ISIC job classes were mapped against these criteria to create an initial shortlist.

The analysis was complemented with further research, leveraging publicly available information from articles and reports tackling topics such as “The Future of Work”, “Remote Work”, “Work in the Digital Age”, “Offshoring Jobs Rationale”, “Tapping into Fluid Talent”, etc. Sources of the articles and reports include:

- International economic and social development organizations [e.g., World Bank, World Economic Forum (WEF), Organization for Economic Co-operation and Development (OECD), International Labor Organization (ILO), etc.]
- Renowned international corporations (e.g., LinkedIn, Microsoft, BCG, etc.)

- Renowned news outlets (e.g., the Financial Times, Forbes, Business Insider, etc.)
- Public conferences and Ted talks

The analysis concluded in shortlisting 30 jobs (Figure 95). Most job names were adjusted to the Standard Occupational Classification (SOC), to streamline data search and collection.

Jobs with high synergies and complementarities were then grouped together to form 11 job clusters (Figure 96), which were then slotted into 3 categories of job outsourcing:

- Business Process Outsourcing (BPO)
- Information Process Outsourcing (IPO)
- Knowledge Process Outsourcing (KPO)

Figure 95 - Shortlisted jobs

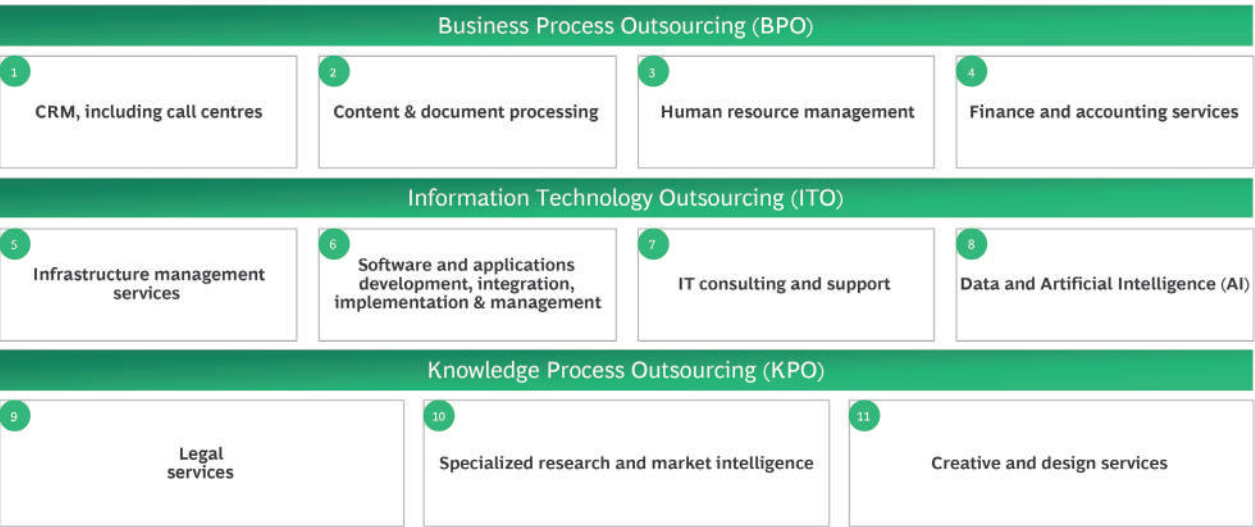
Summary: 30 jobs shortlisted



Source: 1. No clear mapping found in SOC classification, kept due to the momentum the job has been gaining since its emergence, 2. Carved out from existing jobs in SOC classification

Figure 96 - Job clusters

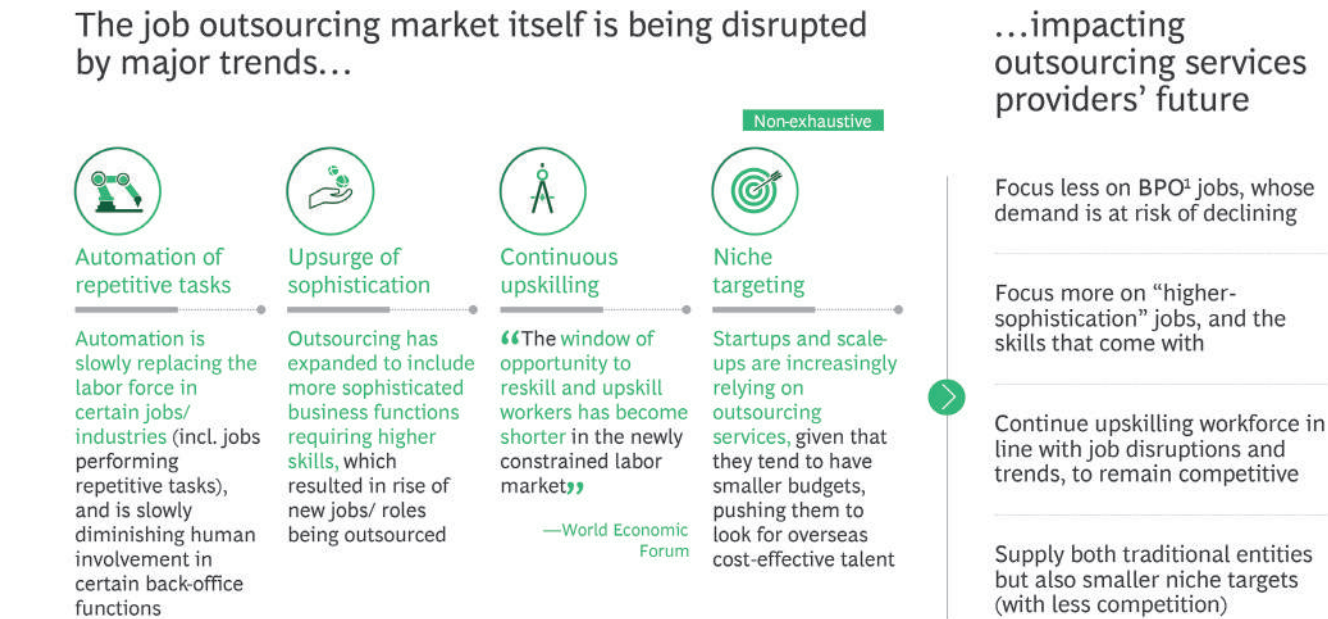
11 job clusters within three job outsourcing categories identified



12.2 Key demand hot spots

The future of job outsourcing is gradually evolving to further cover the more sophisticated jobs, maintain its coverage of intermediary jobs, but diminish coverage of mainstream jobs, especially ones most affected by digitalization and automation. Job clusters with positive future

Figure 97 - Job outsourcing market disruptions



Source: 1. Business Process Outsourcing

Figure 98 - Outsourcing benefits, drawbacks and trends (1)

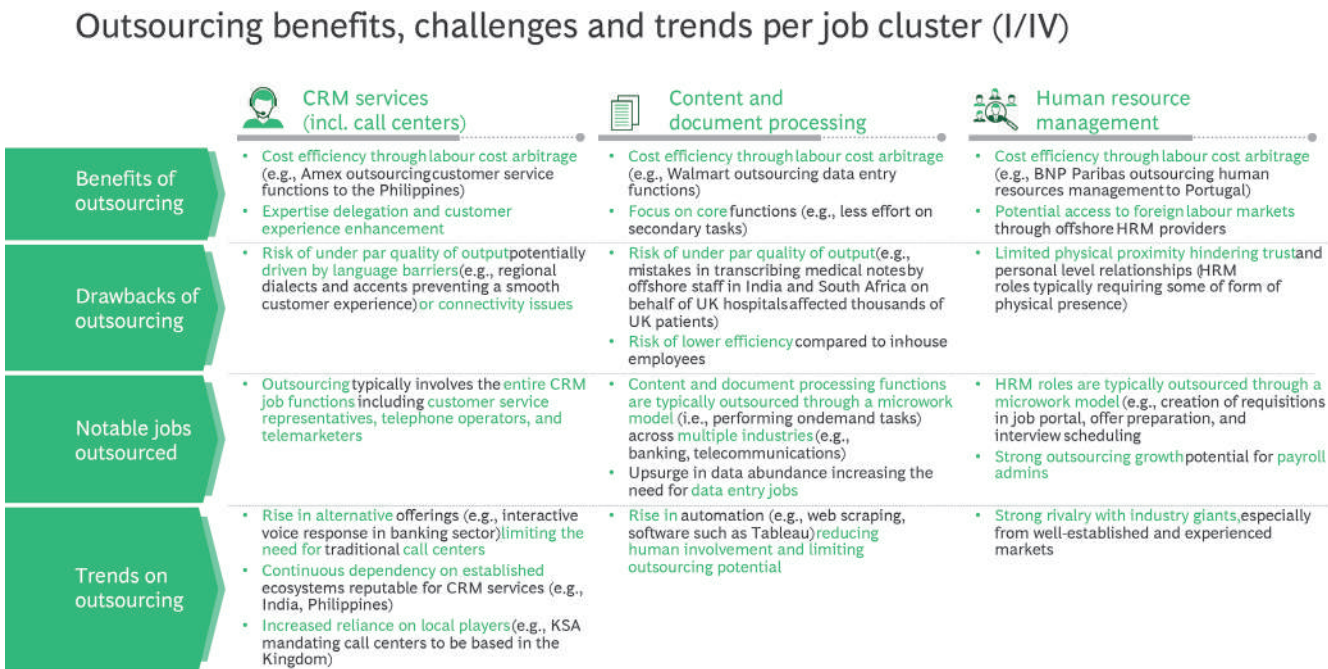


Figure 99 - Outsourcing benefits, drawbacks and trends (2)



Figure 100 - Outsourcing benefits, drawbacks and trends (3)

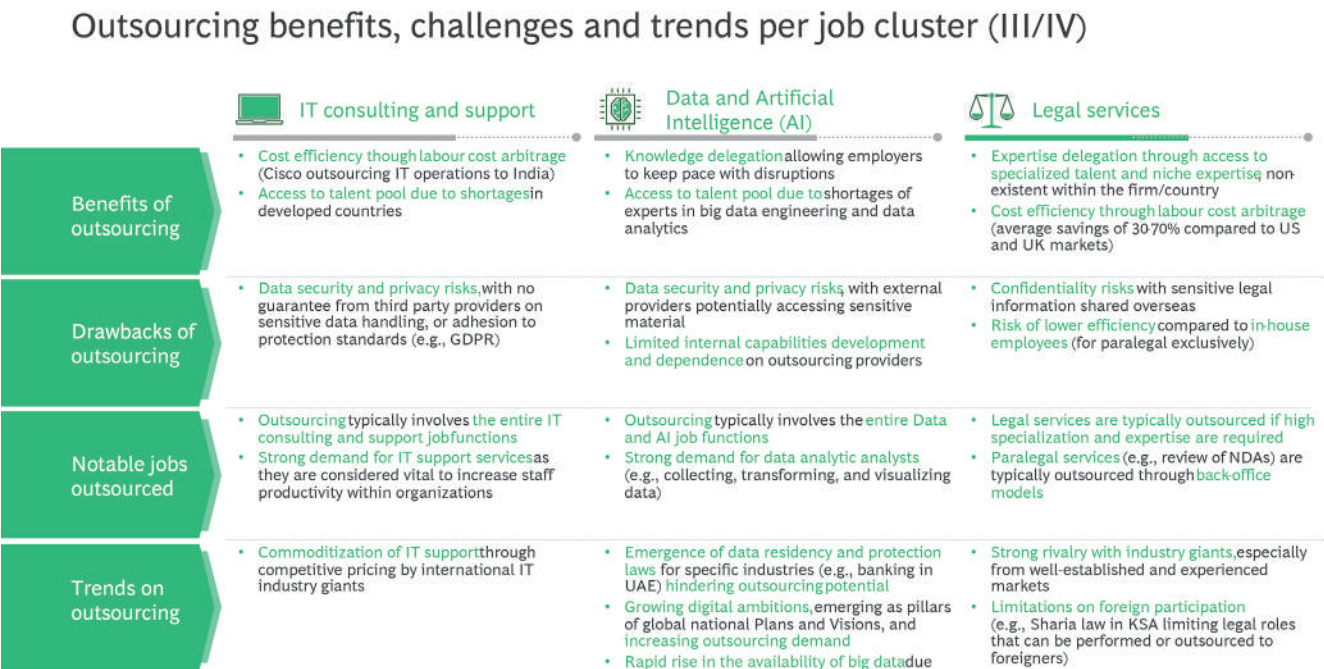
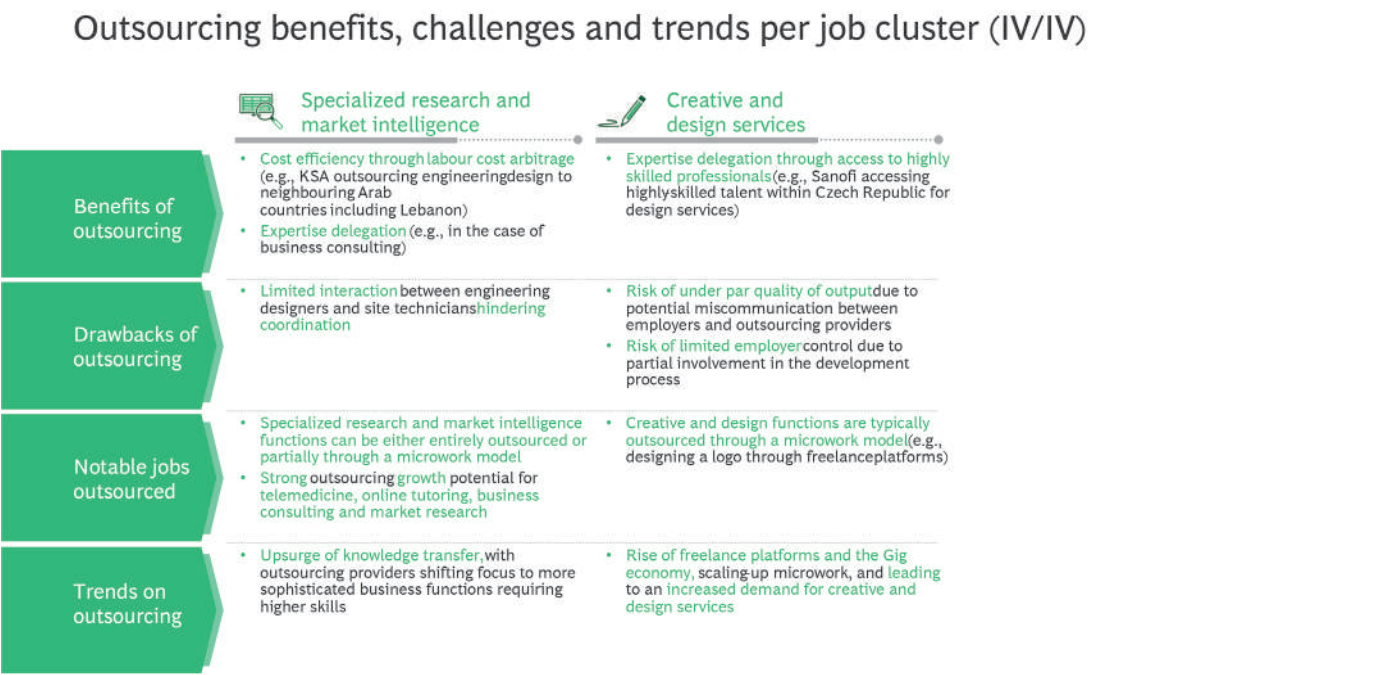


Figure 101 - Outsourcing benefits, drawbacks and trends (4)



12.2.1 UAE

Four sources of input were leveraged to inform future priority sectors and topics for the UAE:

- Detailed review of 10+ National strategies and plans (including Ministry of Economy’s Promising Foreign Investment Sectors, Ministry of Economy’s Promising economic sectors, UAE Centennial 2071)
- Detailed review of 10+ Abu Dhabi and Dubai-level strategies and plans (including Abu Dhabi Economic Vision 2030, Dubai Industrial Strategy 2030)

- Research on employers’ perspective (including ADQ, ADNOC, Daman, ENEC, Tadweer and others)
- Input from experts on the Middle East economic development

12.2.1.1 RATIONALE FOR JOB OUTSOURCING

The UAE and UAE-based entities outsource jobs mainly in pursuit of:

JOB OUTSOURCING RATIONALE	
Cost reduction	Cost-cutting via labor arbitrage is a key benefit of outsourcing (especially for call centers, human resources management, and accounting services). UAE’s average monthly net income per capita is estimated at \$2.8K in 2020, which is 280% higher than the world’s average. This encourages outsourcing in order to reduce labor costs.
Talent pool access	According to the UAE Skills Gap Survey, over 50 percent of companies have reported suffering a skill shortage in one or more key areas. Of these, over 90 percent say they are struggling to find the right candidates to fill those gaps. This supply-demand gap indicates a shortage of talent locally and a need for outsourcing in UAE.
Expertise delegation	Availability of expertise and strength in operational efficiencies are also drivers of outsourcing in the UAE, especially with the constant technological advancements and disruptive technologies (e.g., cloud computing).

12.2.2 KSA

Four sources of input were leveraged to inform future priority sectors and topics for KSA:

- Detailed review of KSA economic growth and diversification (Vision 2030)
- In-depth analysis of giga projects requirements

- Detailed review of PIF strategy and sectors
- Assessment of KSA Vision Realization Programs (VRPs)

12.2.2.1 RATIONALE FOR JOB OUTSOURCING

KSA and Saudi based entities outsource jobs mainly in pursuit of the following benefits:

JOB OUTSOURCING RATIONALE	
Talent pool access	KSA estimates a deficit of ~3 million workers, expected to persist through to 2030. This supply-demand gap highlights the shortage of local talent and need for job outsourcing.
Expertise delegation	Availability of expertise and strength in operational efficiencies are also drivers of outsourcing, especially as organizations in KSA strive to embrace constant technological advancements and disruptive technologies. For example, Saudi Aramco delegated expertise to Google Cloud to deliver its cloud infrastructure.

12.2.3 QATAR

Qatar’s economic diversification plans were leveraged to identify future priority sectors for the country including IT & business services, telecom services, media services, education & research, financial services, airport & warehousing, water transportation, trade and distribution, downstream manufacturing, and tourism & hospitality. Job functions including data and AI, software engineering,

product development, marketing, business development, were also identified as emerging across sectors, and mapped to the emerging outsourcing clusters.

12.2.3.1 RATIONALE FOR JOB OUTSOURCING

Qatar and Qatari based entities outsource jobs mainly in pursuit of the following benefits:

JOB OUTSOURCING RATIONALE	
Cost reduction	The average monthly net income per capita in Qatar is estimated at \$3.2 thousand in 2020, which is 340% higher than the global average. This drives Qatari organizations to outsource simple or repetitive tasks in order to reduce labor costs.
Expertise delegation	Qatar also uses outsourcing to access specialized expertise. For example, the country delegated the architectural design for new athletic stadiums to host the upcoming FIFA World Cup to reputable international firms.

12.2.4 USA

Supply-demand workforce gaps were identified for major job groups in 2020, 2025, and 2030 leveraging Faethm data. Job functions with significant gaps and showing a strong potential for outsourcing included architecture and engineering, art, design, entertainment, sport, and media, computer and mathematics, educational instruction, and

library, and legal services. These job functions were then mapped to the emerging outsourcing clusters.

12.2.4.1 RATIONALE FOR JOB OUTSOURCING

The USA and USA-based entities outsource jobs in pursuit of the following benefits:

JOB OUTSOURCING RATIONALE	
Cost reduction	Cost-cutting via labor arbitrage is a key benefit of outsourcing for US firms, with considerable differences in wages, employee taxes, and insurance fees. For every dollar of corporate spending that moves offshore, U.S. companies save 58 cents.
Talent pool shortage	A talent shortage in the US is driving employers to look for the required skills and labor overseas.

12.2.5 FRANCE

Public reports were leveraged to identify 7 industries facing talent shortage in France including banking and finance, construction, education, health, and government, IT and technology, manufacturing, restaurants and hotels, whole-sale, and retail trade, as well as future jobs that will plausibly face talent gaps including information security, digital

product development, digital transformation, digital sales, and big data analytics. These job functions were then mapped to the emerging outsourcing clusters.

12.2.5.1 RATIONALE FOR JOB OUTSOURCING

France and France-based entities outsource jobs in pursuit of the following benefits:

JOB OUTSOURCING RATIONALE	
Cost reduction	Cost-cutting via labor arbitrage is a key benefit of outsourcing, considering the significant level of social charges and employee taxation in France (i.e., for every euro of spending on offshore jobs, employers are saving on average ~ 0.36 euros)
Talent pool shortage	France faced a talent deficit of ~ 560 thousand highly skilled workers in 2020 and is expected to face a 1.5 million deficit by 2030, driving employers to seek overseas talent

12.2.6 UK

Public reports were leveraged to identify 9 occupations facing talent shortage in the UK by 2030 including information and communication, professional services, finance and insurance, health and social work, energy utilities, public admin and defense, education, recreational services, manufacturing. Jobs presenting a potential for outsourcing included information and communication, professional

services, finance and insurance, and education. These job functions were then mapped to the emerging outsourcing clusters.

12.2.7 RATIONALE FOR JOB OUTSOURCING

UK and UK-based entities outsource jobs in pursuit of the following benefits:

JOB OUTSOURCING RATIONALE	
Cost reduction	Cost-cutting via labor arbitrage is a key benefit of outsourcing, with UK employers saving on average 40% to 60% of their costs when offshoring
Talent pool shortage	UK is expecting a talent deficit of ~ 2.5 million highly skilled workers by 2030, driving employers to seek overseas talent

12.3 Case studies

12.3.1 INDIA CASE STUDY:

Outsourcing emerged in India in the 90’s, with airline companies as the first to outsource back-office tasks followed by IT companies. The Indian government implemented at the same time economic reform programs leading to liberalization and privatization and driving more foreign companies to outsource to India.

The outsourcing market size in India (2021) was:

- USD 7 Bn for BPO
- USD 14.8 Bn for IT outsourcing

In 2018 there were ~1.2 Mn BPO and ~ 4 Mn IT related jobs in India. It is important to note that ~ 30% of IT work for US companies is done abroad, mostly in India.

Main outsourcing cities in India include:

- Bangalore (leading companies include Infosys, Wipro, Intel, IBM, SAP, SAS, Dell, Tisco, TI, Motorola, HP, Oracle, Yahoo)
- Chennai (leading companies include Cognizant, Standard Chartered, Polaris, EDS and Pentamedia)
- Hyderabad (leading companies include Google and Microsoft)

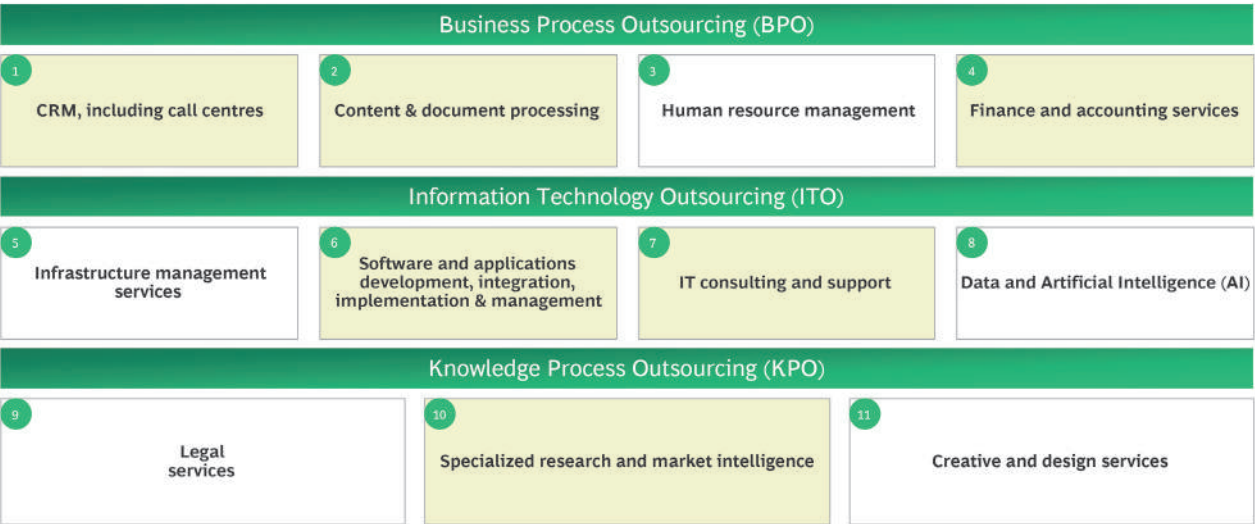
India serves six key job clusters when it comes to outsourcing: (1) CRM, including call centers, (2) Content & document processing, (3) Finance and accounting services, (4) Software and applications development, integration, imple

mentation & management, (5) IT consulting and support, (6) Specialized research and market intelligence.

Key countries served include the United States, the United Kingdom, European Union countries.

Figure 102 - Key job clusters served in India

Key jobs/ job clusters served in India



Workforce characteristics include:

- High number of annual graduates: ~ 3M graduates per year, with an abundant English-speaking workforce
- Young population: Over 50% of the population is below 25 years)
- Low labor costs: ~ USD 425 per month

Enablers include:

- Infrastructure: High-end telecom facilities and infrastructure
- Legal and regulatory incentives:
 1. Politically and economically stable country
 2. Friendly tax structure
 3. Supportive policies to the IT industry (e.g., India Na-

tional Association of Software and Service Companies supporting the industry, Information Technology Act acknowledging electronic contracts, Indian cyber law)

Upskilling examples:

- Government: Developed dedicated entities and programs for upskilling (e.g., National Skill Development Corporation, Indian Institute of Skills, Skill India Program)
- Private sector: Corporate partnerships (e.g., “Future Ready Talent” on digital upskilling for higher education students in partnership with Microsoft, EY, GitHub and Qess Corp)

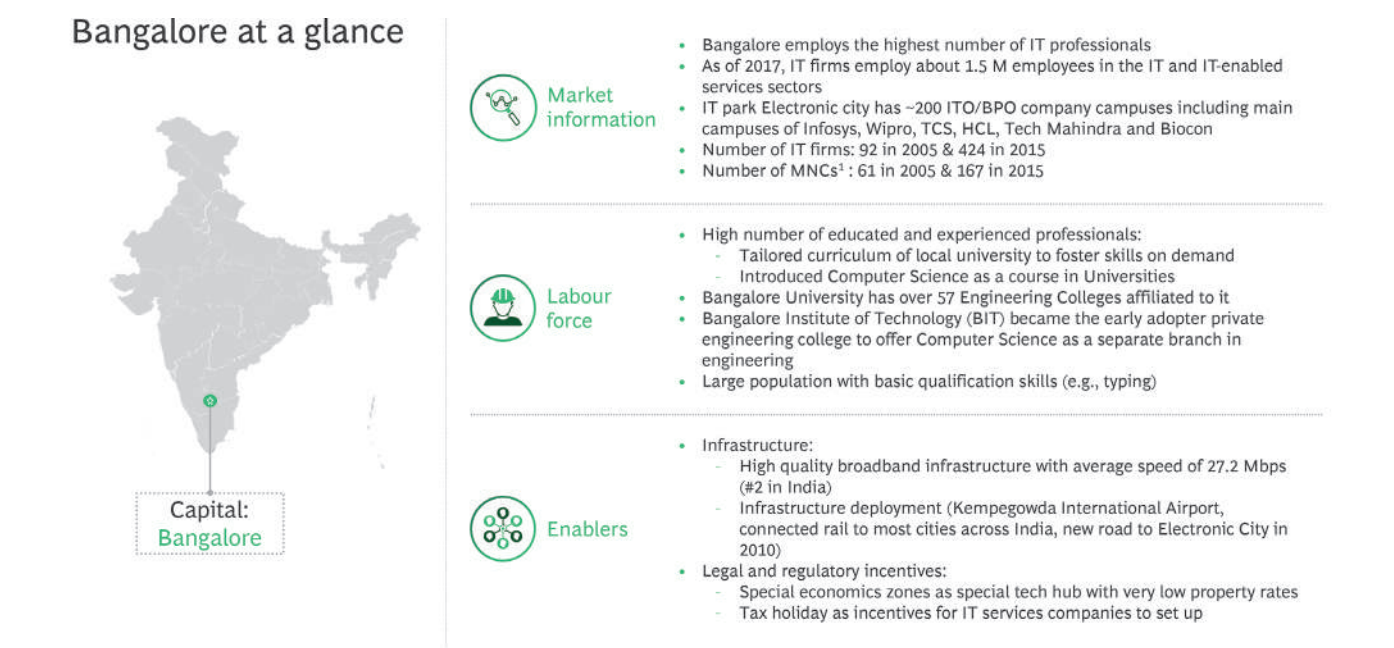
However, key challenges are facing India’s outsourcing ambitions:

- Increasing attrition rates—Attrition rates have reached 40% at some companies resulting in quality issues as output is affected by employee change

- Increased labor costs—Compared to other outsourcing countries, e.g., Bangladesh, Philippines, etc.)
 - Cultural Differences—Differences in working style, decision making, and organizational structure play a major role in reducing cross-border efficiencies
- Insufficient privacy and security laws—Outsourcing comes with a risk of losing intellectual properties (e.g., trade secrets) and a risk of breach of data privacy

Bangalore is the largest city when it comes to talent pool supply for offshore companies looking to source-in foreign talent. See in image below the characteristics of Bangalore.

Figure 103 - Bangalore zoom-in



12.3.2 BANGLADESH CASE STUDY

Outsourcing emerged in Bangladesh in 2008, with call centers at the heart of it. In 2009, other BPO related jobs gained traction in outsourcing out of Bangladesh.

The outsourcing market size in Bangladesh (2017) was USD 300 Mn for BPO (20% growth year-on-year since 2009)

In 2017 there were ~40k BPO related jobs in Bangladesh. Freelancing service provision occupies most of the outsourcing jobs in the country.

Dhaka is the main outsourcing city in the country (leading companies include IBM, Accelerance, Tech Mahindra, Capita)

Bangladesh serves three key job clusters when it comes to outsourcing: (1) Infrastructure management services, (2) Software and applications development, integration, implementation & management, (3) IT consulting and support.

Figure 104 - Key job clusters served in Bangladesh

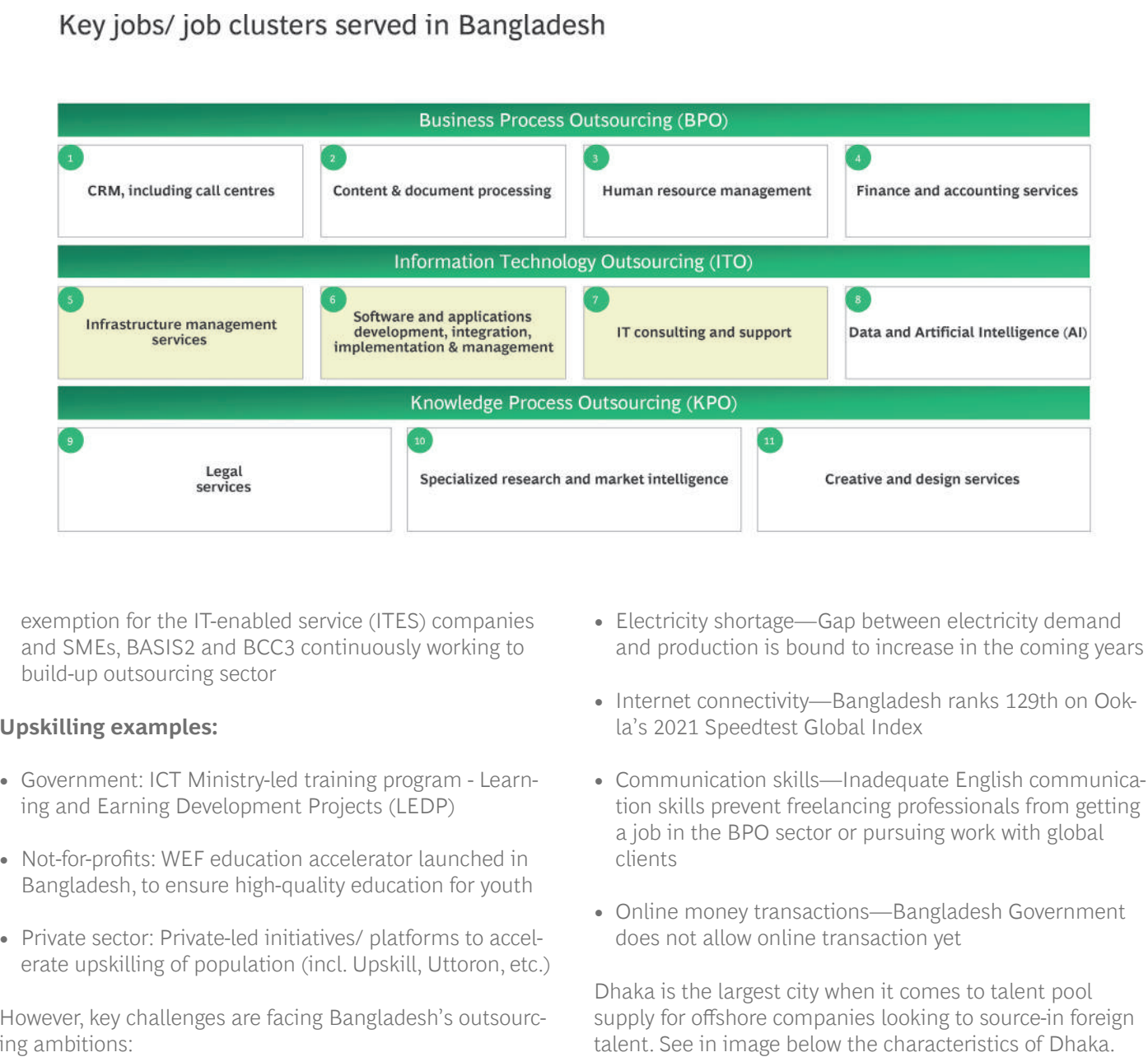
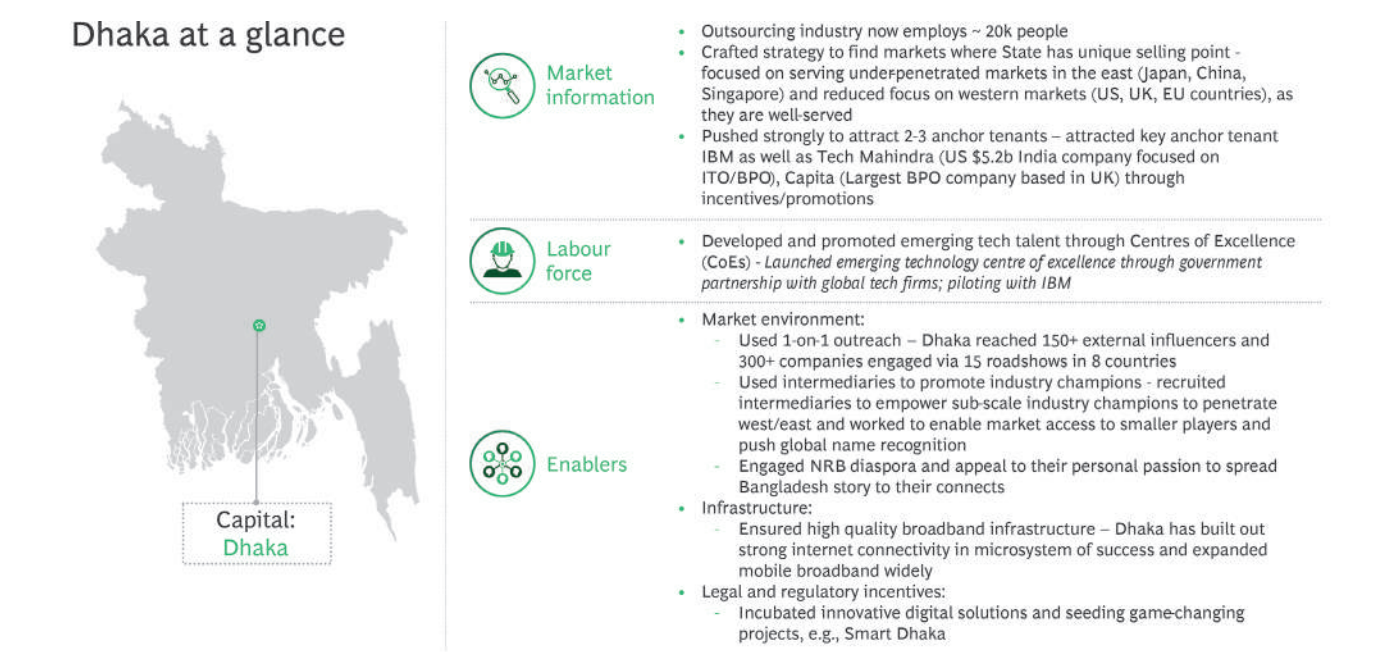


Figure 105 - Dhaka zoom-in



12.3.3 UKRAINE CASE STUDY
The IT services outsourcing market size in Ukraine (in 2021) was USD 6.8 Bn, accounting for ~ 4% of the country's GDP

In 2021 there were ~ 285k IT professionals in Ukraine in 2021, servicing clients around the world. Also 65% of

Ukrainian institution outsource to Europe.

Outsourcing is distributed across cities in the country, with Kyiv being a leading offshore outsourcing service provider.

Ukraine serves three key job clusters when it comes to outsourcing: (1) Infrastructure management services, (2)

Figure 106 - Key job clusters served in Ukraine



Software and applications development, integration, implementation & management, (3) IT consulting and support.

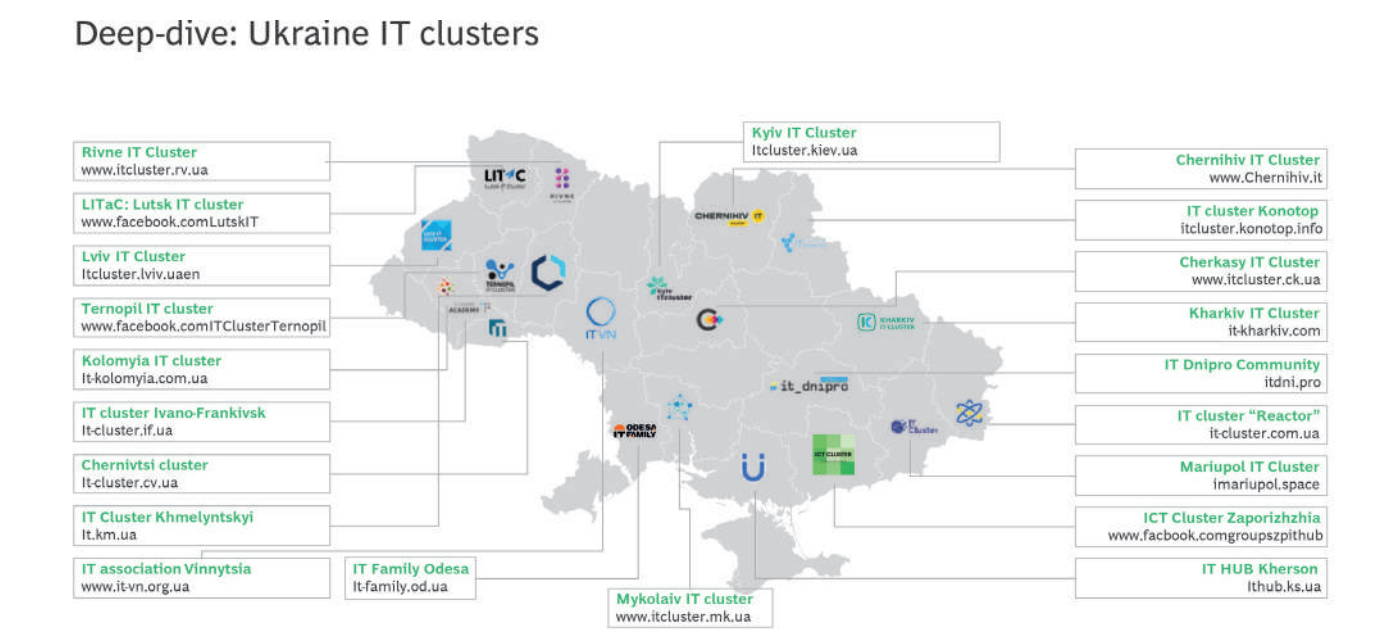
Key countries served include European countries (most notably Switzerland, Malta, Germany, Cyprus, Netherlands), United Kingdom, and Canada.

- Workforce characteristics include:**
- Large number of ICT specialists (~ 290k), highly ranked as per IT competitiveness index
 - Most IT specialists have specialized higher ed and are proficient in English language
- Enablers include:**
- Infrastructure: Strong digital infrastructure (incl. cyber and data security)
 - Legal and regulatory incentives:

- Favorable tax system (corporate and individual) for IT businesses
- Gov't to introduce a special legal framework in '22 for the IT industry – Diia City (similar to SEZ) to provide incentives to resident IT companies
- Creation of clusters to support education, new businesses, events, etc.

- Upskilling examples:**
- Government: Extensive network (clusters) of publicly funded technical universities
 - Private sector:
- Companies (including EPAM, SoftServe, Luxoft, ELEKS, etc.) created their own talent training programs for people from other industries to obtain IT education & employment
 - Numerous non-formal IT education institutes emerged (including Beetroot academy, Go IT, Step IT, etc.)
 - Hundreds of conferences and meetups on IT industry (including fwdays, iforum, etc.)
- However, key challenges are facing Ukraine's outsourcing ambitions:
- Political stability—Lately unstable due to the unfortunate events that have occurred and the Russian invasion
 - Labor costs—Though cost of labor for IT specialists is lower in Ukraine than in Western countries, average costs range around USD 2k per month and are high in comparison to developing countries
 - Corruption—Ukraine ranks 122/180 in corruption index, potentially preventing further scaling of the job outsourcing industry in the country

Figure 107 - Ukraine IT clusters



Local IT companies, educational institutions, legal and financial advisors often come together to create horizontal communities referred to as IT clusters (see image below). The main areas of focus for IT clusters are:

- Education and efforts to make IT occupations more popular
- Analytical research of the industry
- Holding events and conferences on relevant topics
- Support for new businesses, startup competitions, etc.

12.3.4 PHILIPPINES CASE STUDY

In 1992, an international Global Resource Center initiated the local BPO industry in the country. In 1995, Congress passed the Special Economic Zone Act, paving the way for the creation of the Philippine Economic Zone Authority (PEZA) and driving international BPOs in the country.

The BPO outsourcing market size in the Philippines (2017) was ~ USD 30 Bn, with 8% to 10% year on year growth.

In 2017 there were ~670k BPO, and ~200k IT related jobs in the Philippines.

Main outsourcing cities include Quezon City, Manila, and Cebu.

The Philippines serves five key job clusters when it comes to outsourcing: (1) CRM, including call centers, (2) Content & document processing, (3) Human resource management, (4) IT consulting and support, (5) Creative services and design.

Key countries served include the United States, Australia, New Zealand and others (including a few European countries).

Workforce characteristics include:

- English proficiency, with a youth literacy rate as high as 97.94%
- Ability to adapt to different cultures
- Low labor costs (~ USD 360 average monthly salary)

Enablers include:

- Infrastructure: High quality broadband infrastructure (strong push to improve Philippines’s positioning and access to internet services during Covid-19 crisis)
- Legal and regulatory incentives:
 1. Tax reliefs and exemptions (e.g., exemption from corporate income tax)
 2. Special Economic Zones Philippine Economic Zone Authority

Upskilling examples:

- Government: Developed dedicated upskilling programs (e.g., Philippine Skills Framework)
- Private sector: Upskilling programs via the Information Technology and Business Process Association of the Philippines (IBPAP) (5-year program targeting one mil-

lion Filipinos through upskilling vouchers, scholarships and immersions, student grants)

However, key challenges are facing the Philippines’ outsourcing ambitions:

- High attrition rates—High turnover of BPO workers putting further strain on employers’ ability to train workers for higher value-added activities
- Increased labor costs—Compared to other outsourcing countries with lower wages (e.g., Bangladesh)

- Managerial scarcity—Despite the surplus of talent across all occupations at the entry level in the Philippines, management ability is not matched
- Security and natural risks—Philippines is not the most attractive destination in terms of security threats and natural disasters

Manila is the largest city when it comes to talent pool supply for offshore companies looking to source-in foreign talent. See in image below the characteristics of Manila.

Figure 109 - Manila zoom-in

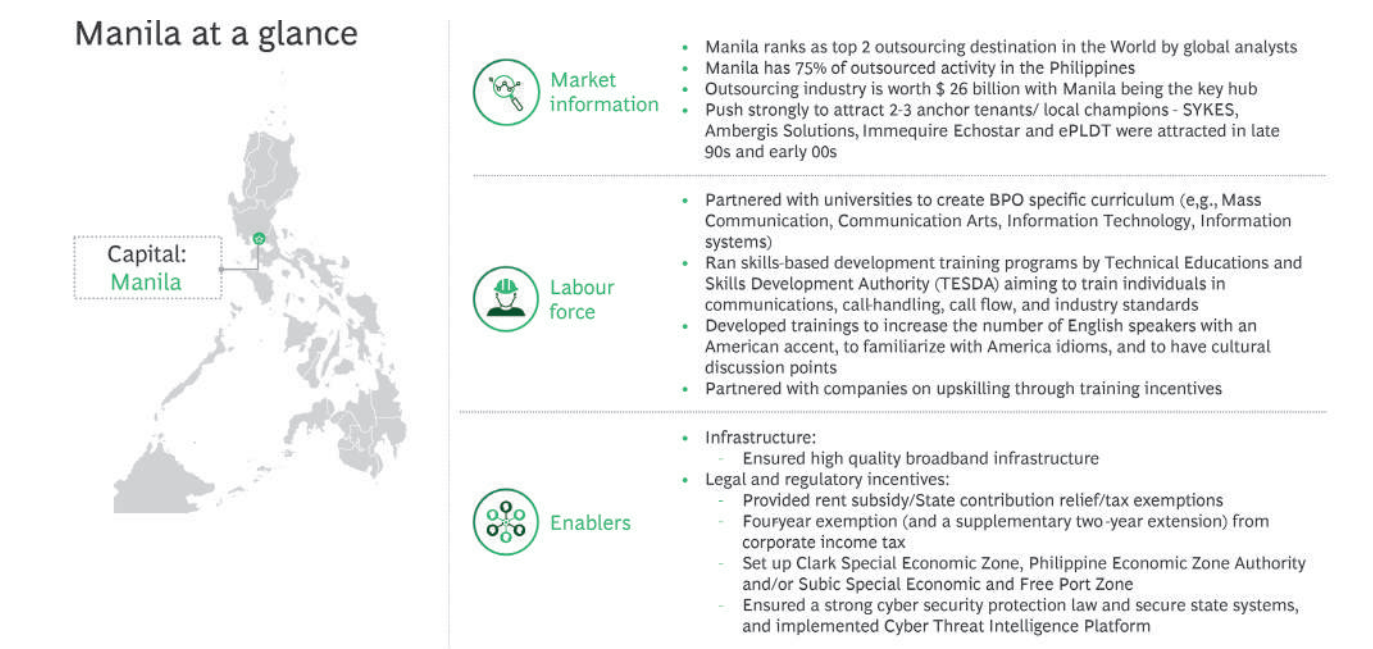
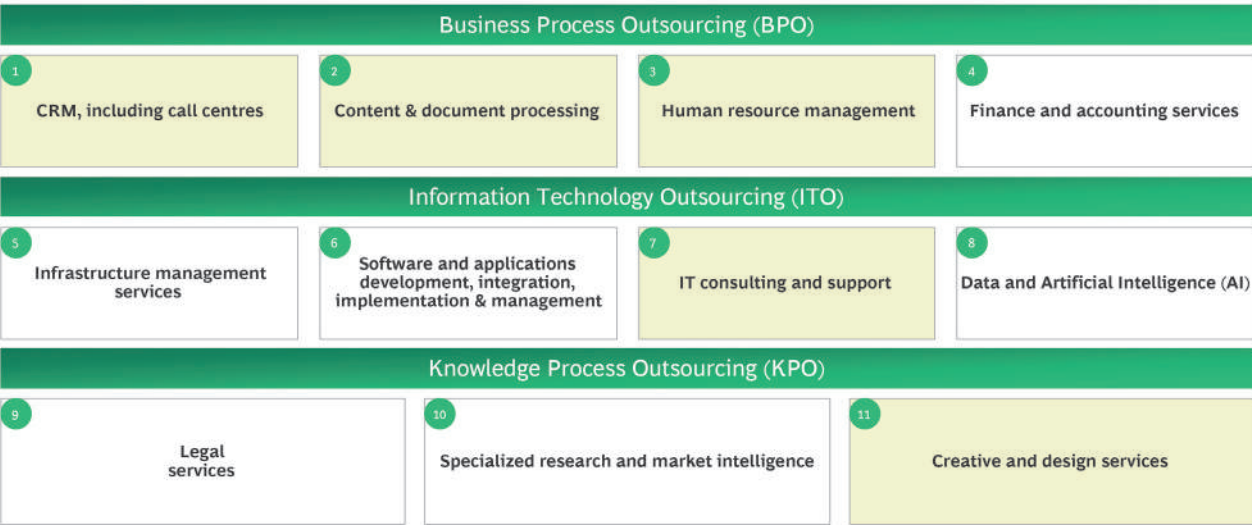


Figure 108 - Key job clusters served in the Philippines

Key jobs/ job clusters served in the Philippines



12.3.5 CHINA CASE STUDY

BPO began in China on a budding scale in the early 2000s and has grown dramatically since then.

The BPO outsourcing market size in China (2021) was ~ USD 15 Bn, with 11% expected CAGR from 2022 to 2030.

Main outsourcing cities include Beijing, Shanghai, and Guangzhou.

China serves five four job clusters when it comes to outsourcing: (1) CRM, including call centers, (2) Content & document processing, (3) Human resource management, (4) IT consulting and support.

Key countries served include Japan, South Korea, and the United States.

Workforce characteristics include:

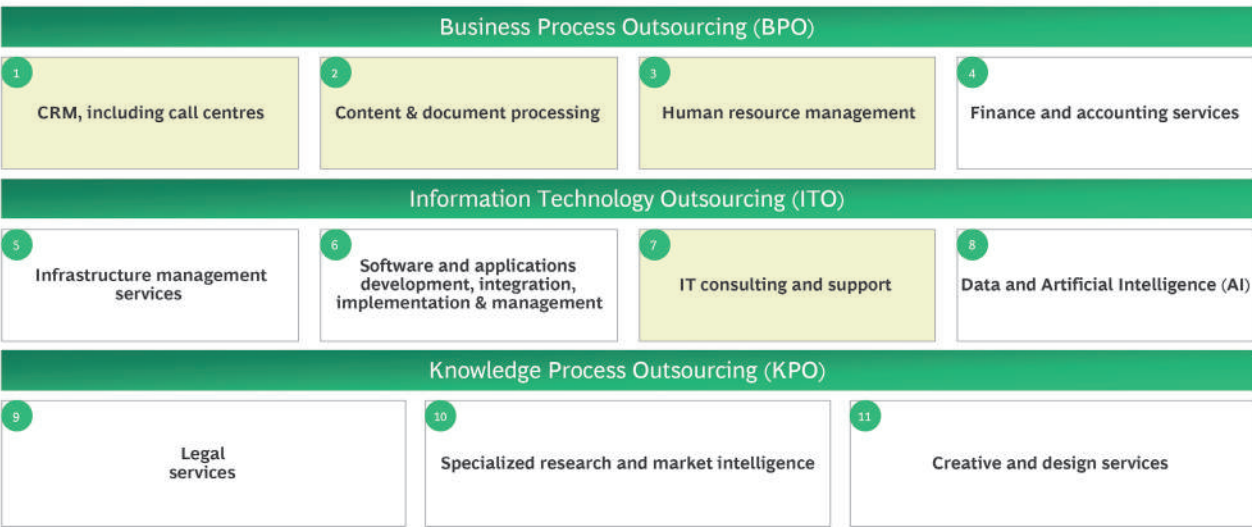
- Large supply of human capital
- Competitive wages (starting from \$300 per month)
- Highly skilled workers with comprehensive trainings

Enablers include:

- Infrastructure: Improvements in infrastructure to support the outsourcing industry

Figure 110 - Key job clusters served in China

Key jobs/ job clusters served in China



• Legal and regulatory incentives:

1. Tax breaks to encourage development outside key outsourcing centers
2. Loans and credit insurance for outsourcing enterprises
3. Funds and incentives to improve technical trainings to achieve international certification levels

Upskilling examples:

- Government:
 1. Financial support granted to companies and social training agencies for launching training courses on professional skills
 2. Digital trainings and certifications provided by China's National Centre for Educational Technology
- Not-for-profits: Reform development programs for a skilled workforce (e.g., partnership between World Bank and technical colleges to carry out curriculum reforms)

However, key challenges are facing China's outsourcing ambitions:

- Weak Data Privacy Law—No comprehensive law addressing data privacy protection, and high risk of losing intellectual properties (e.g., business plans)
- Language barrier—Lack of English fluency is impeding China's current efforts to serve the North American and European markets
- Strong competition—Competition from abroad is increasing (e.g., India with many years of experience working with large multinational companies)

12.3.6 POLAND CASE STUDY

The outsourcing industry in Poland has been growing since 1995. Poland started to get recognized as an outsourcing destination post its admission to the European Union in 2004.

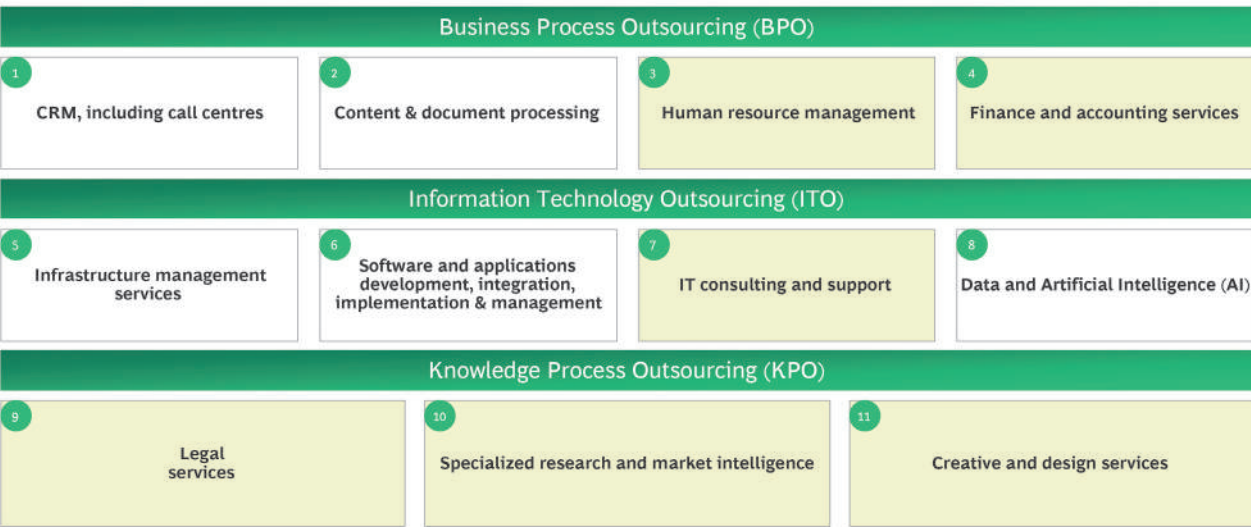
The outsourcing market in Poland (2021) contributes ~ 3.5% to the country's GDP.

Main outsourcing cities include Warszawa, Kraków, and Gdańsk.

Poland serves six four job clusters when it comes to outsourcing: (1) Human resource management, (2) Finance and accounting services, (3) IT consulting and support, (4) Legal services, (5) Specialized research and market intelligence, (6) Creative and design services.

Figure 111 - Key job clusters served in Poland

Key jobs/ job clusters served in Poland



Key countries served include France, Germany, Nordic countries (Sweden, Denmark, Finland, Norway), and the United States.

Workforce characteristics include:

- High level of specialized expertise with Cultural proximity to Western Europe
- Low labor costs and low labor turnover (50% of EU average)
- Knowledge of European languages

Enablers include:

- nfrastructure: Cheap, fast and stable internet services
- Legal and regulatory incentives:
 1. Tax exemptions and allowances in Special Economic Zones
 2. Support of R&D activities through grants (e.g., Applied Research Program) and establishment of the "Outsourcing Institute"

Upskilling examples:

- Government:
 1. Providing companies with government grants for employees
 2. Expanding career counselling services in education institutions training with targeted funding
 3. Improving support for effective teaching (e.g., forum for providing best practices guidance)
- Private sector: Regular workshops on digital skills acquisition

However, key challenges are facing Poland's outsourcing ambitions:

- Regional stability – Due to the recent unfortunate events involving Russia and Ukraine and impacting regional stability and business confidence
- Shrinking labor pool—Population of Poland has been decreasing over the last years, impacting human capital available for outsourcing

12.4 Supply methodology: Labor qualifications and abundance

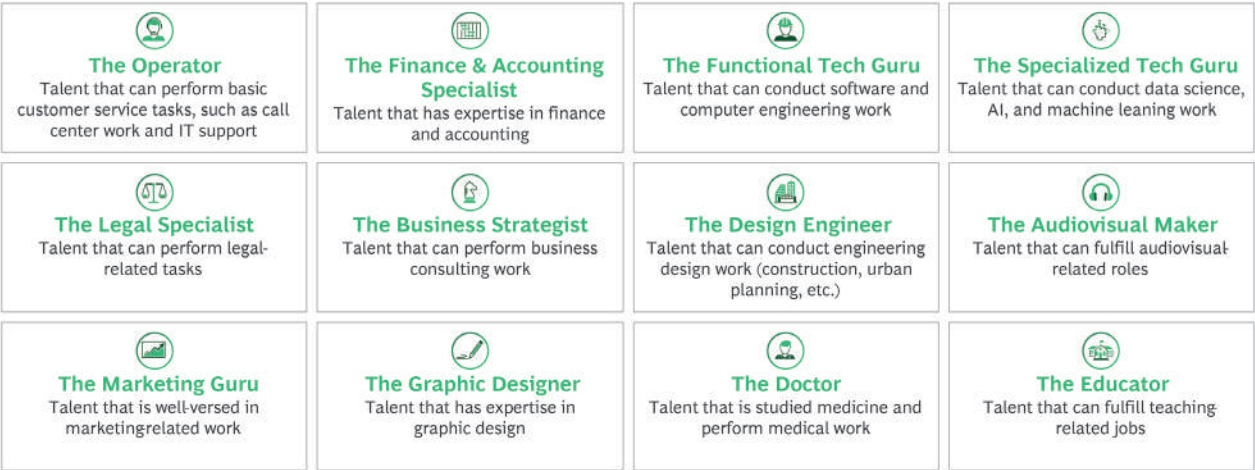
12 different remote work talent personas suitable for out-sourcing were identified and analyzed to assess labor qualifications and abundance in the countries of focus.

For each persona, labor qualifications were assessed using a set of metrics such as the ranking of the country’s quality of education system, ranking of the country on digital skills,

rankings of countries’ university programs worldwide, and existence of notable and/or global players operating in the country of focus. Labor abundance was also evaluated based on a set of metrics such as the number of fresh graduates from relevant university programs annually (e.g., software / computer engineering fresh graduates for the functional tech guru), and the percentage of labor working in the field from total workforce (e.g., percentage of labor working in the education sector from total workforce, for the educator).

Figure 112 - The 12 remote work talent personas

12 different remote work talent personas suitable for outsourcing were identified and analyzed to assess talent qualification and abundance



12.5 Lebanon

12.5.1 VALUE PROPOSITION

The five key pillars for a successful talent pool ecosystem

for job outsourcing were assessed to identify Lebanon’s value proposition and competitive advantages.

PILLARS	DIMENSIONS	KEY FINDINGS
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">• 21% of the population holds a university degree and above• Lebanon ranks in top 25 countries worldwide on digital skills and ability of skilled labor, 18th for the quality of its educational system, and 4th for quality of Math and Science Education• Country is home to 4 world-class universities that rank in top 30 in Arab region, such as the American University of Beirut (#252 worldwide, #4 in the Arab region, and #73 in graduate employability)
	Language proficiency	<ul style="list-style-type: none">• Lebanon offers a pool of readily available tri-lingual labor, with qualified talents fluent in at least 2 languages (Arabic, English, or French)• 43% of schools use French as the foreign language, 34% use English, and 23% use both
	Labor availability	<ul style="list-style-type: none">• Lebanon ranks 71st place globally in the INSEAD Global Talent Competitiveness Index 2021• Country ranks 5th out of 134 countries in ease of finding skilled employees in the GTCI 2021• 89% of the population lives in urban areas, meaning that most workers have access to decent telecom infrastructure or live in proximity to well-equipped co-working spaces• Overall unemployment rate increased from 11.4% in 2018-2019 to 29.6% in 2022, and youth unemployment rate reached 47.8% in 2022, due to the economic crisis and COVID pandemic• Many mid-career professionals are at risk of leaving the country in search for better opportunities• Weak physical and telecom infrastructures put rural population at disadvantage
	Labor cost	<ul style="list-style-type: none">• Labor is cost-competitive, nearly 27% less costly than GCC countries and nearly 55% lower than developed countries





PILLARS	DIMENSIONS	KEY FINDINGS
Market environment	Political stability	<ul style="list-style-type: none"> Lebanon’s political risk score is high (3.8 – where scores > 3.2 are deemed high), among the highest in MENA and globally Lebanon ranks 127th in political stability (2021 Global Talent Competitive Index)
	Economic stability	<ul style="list-style-type: none"> Lebanon’s economic risk score is high (6.5 – where scores > 3.2 are deemed high), among highest in the world given severe economic crisis and high inflation rates; however, existence of a strong, innovative, & highly-ranked startup ecosystem Recent economic crisis ranks in top 10 most severe crises globally since mid-19th century Real GDP plummeted from about USD 45 billion in 2018 to USD 33.5 billion in 2021 Inflation rates on consumer prices reached 210% in 2022
	Proximity to well-known demand hot spots	<ul style="list-style-type: none"> Lebanon is strategically located close to well-known regional and global demand hot spots (1 to 2-hour time difference with the UAE, KSA, Qatar, and major European counties) Global companies, especially American and East Asian, can benefit from a time zone advantage given the geographical, central location of the country
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none"> Lebanon has a multilingual population and vast diaspora bridging the cultural gap between Lebanon and the other Arab, European, and American countries
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> Internet penetration reached 94% in 2019 (versus 63% global) Broadband speeds are low relative to global standards, but improved drastically over last decade Mobile broadband download speeds stand at 45 Mbps Fiber-optic network is currently under deployment, with services offered in key locations in the country (e.g., Achrafieh, Hamra and Ras Beirut)
	Digital maturity levels	<ul style="list-style-type: none"> Lebanon ranks 2nd in the region in the Digital Access Index (DAI) Country ranks medium in the GovTech Maturity Index In 2017, the digital transformation initiative was launched by the government to set the course for developing a national digital transformation strategy
	Physical infrastructure readiness	<ul style="list-style-type: none"> Lebanon suffers from long-term structural vulnerabilities, including low-grade infrastructure, such as a dysfunctional electricity sector, and water supply shortages The public transit sector faces challenges in terms of availability, accessibility, and quality Lebanon ranks 127th globally (out of 141) for quality of road infrastructure Urban areas, especially Beirut, face huge traffic congestion (cost of congestion in Beirut is estimated to be more than 2% of the city’s gross regional product)
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Lebanon offers abundant A-class office space, available in both the capital and urban cities, offering prime infrastructure, connectivity, and a vibrant business environment Co-working spaces with proper infrastructure (internet, electricity, etc.) are offered for freelancers, such as Berytech, BDD, Antwork, the Koozspace, and others

PILLARS	DIMENSIONS	KEY FINDINGS
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Series of financial and non-financial incentives for investment projects are offered to local and foreign investors in key sectors through 2 incentive schemes: <ul style="list-style-type: none"> The Package Deal Contract Scheme, offering incentives for large scale projects The Investment Project by Zone, offering incentives for small and medium sized projects located in the regions with the highest socio-economic challenges Corporate income taxes are fixed at 17%
	Special economic zones’ availability	<ul style="list-style-type: none"> No special economic zones currently exist in Lebanon; efforts to establish such zones were undertaken but faced significant delays in operationalization due to the economic crisis (for example the Tripoli Special Economic Zone - TSEZ)
	Data and IP protection laws	<ul style="list-style-type: none"> No comprehensive data protection legislation is in place, but privacy provisions are contained in Law No. 81 on Electronic Transaction and Personal Data Although Lebanon is not a member of the World Trade Organization (WTO), its intellectual property rights (IPR) legislation is generally compliant with Trade-Related Intellectual Property Rights (TRIPS) standards. However, IPR enforcement is weak
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Government is actively involved in enabling set-ups of outsourcing businesses, such as: <ul style="list-style-type: none"> The Investment Development Authority of Lebanon (IDAL) offering information and facilitation Ministry of Telecommunications is aiding on the regulatory front and facilitating the issuance of licenses to call centers There are no specific regulations that exist to govern job matching platforms in the country
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Government’s investment in skilling, re-skilling and upskilling talent is relatively weak; few initiatives were launched to provide technical training: Development 2018-2022 National Strategic Framework for TVET with UNICEF & ILO; however, framework hasn’t been implemented yet Establishment of development centers and training programs by Ministries; however, those programs are fragmented and do not cater for labor market’s needs
	Private sector efforts	<ul style="list-style-type: none"> Insufficient qualified labor placements and apprenticeships are offered to meet the demand for training in the workplace Strong support network of private training institutions where the country has the one of highest concentration of training institutions per capita in any MENA country (e.g., BDD, Berytech, etc.)
	Not-for-profit institutions’ efforts	<ul style="list-style-type: none"> Lebanon is home to several non-profits that launched multiple initiatives to skill, re-skill and upskill talent across multiple areas related to future of work, including digital and technology

Figure 113 - Not-for-profit training programs in Lebanon

Deep dive: several training programs launched by non-profits to skill, re-skill and upskill talent in the country

Non-exhaustive

				
Objective	• Provide scholarships to complete Google Career Certificates	• Support development of youth's innovative solutions to address sustainable development challenges (e.g., SDG)	• Enable youth with vulnerable economics with digital skills for freelance, full time, or part time employment	• Address the high unemployment rates among youth in Lebanon & their lack of access to the knowledge economy
Program design	• Scholarships offered by Amideast in partnership with Google and Coursera	• Youth Leadership Programme offered in partnership with DOT, Riyadh, ETI, and Injaz	• DoIT project delivered by DOT and funded by Abdul Aziz Al Ghurair Fund	• Generation of Innovation Leaders (GIL) program with workshops, events, and training tracks
Target audience	• Lebanese youth (young professionals)	• Lebanese, Arabic speaking youth between the age of 19 and 29	• Youth population, including refugees in Lebanon	• Marginalized youth in Lebanon
Impact	• 400 scholarships offered to pursue Google certificates	• 200+ participants	• 2,400 youth equipped with digital, linguistic, and life skills	• 8 Innovation Labs established and 12,000+ youth reached
Key offering components	• High-demand fields: IT Support, Project Management, Data Analytics, UX Design, and IT Automation with Python	• Training and capacitybuilding for youth through workshops, innovation camps, hackathons and other activities	• Market-driven courses in Digital & Media Literacy, Mobile App Development, Microwork, Social Media Marketing, Robotics	• Trainings on Digital Skills, Social Entrepreneurship, Design Thinking and Tech Woodwork
Length	• Less than 6 months	• At least 1 day per week from April till August	• 100 hours for Python course	• 4 months
Delivery model	• Online classes via the Coursera online platform	• Online workshops and hands-on activities	• Physical and online training sessions	• Physical and online training sessions

Source: 1. Digital Opportunities Through Integrated Training

12.5.1 REMOTE WORK TALENT PERSONAS

Twelve different remote work talent personas suitable for

outsourcing were identified and analyzed to assess talent qualification and abundance in Lebanon.

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Operator	High	High
	<ul style="list-style-type: none">• Top 25 countries worldwide on digital skills• Trilingual labor	<ul style="list-style-type: none">• Almost all the workforce qualifying, incl. public sector employees (~15% of total workforce)
The Finance & Accounting Specialist	Medium	Medium
	<ul style="list-style-type: none">• Only 1 finance & accounting university program in top 700 worldwide (American University of Beirut)	<ul style="list-style-type: none">• ~2.5% of the workforce part of the finance & insurance activities sector• ~2k business major graduates annually
The Functional Tech Guru	< 2 years of relevant work experience	
	High	Medium
	<ul style="list-style-type: none">• 4 computer engineering university programs in top 700 worldwide (American University of Beirut, Lebanese American University, Université Saint-Joseph, and Lebanese University)	<ul style="list-style-type: none">• ~500 computer and software engineering graduates annually
	2+ years of relevant work experience	
	Medium	Low
	<ul style="list-style-type: none">• Well-developed ecosystem of companies with notable players (e.g., Murex) and strong local talent base operating in the field	<ul style="list-style-type: none">• ~1.5% of the workforce part of the ICT sector (sector dominated by SMEs with 1 large player – Murex)

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Specialized Tech Guru	< 2 years of relevant work experience	
	High	Medium
	<ul style="list-style-type: none">• 4 computer engineering university programs in top 700 worldwide (American University of Beirut, Lebanese American University, Université Saint-Joseph, & Lebanese University)	<ul style="list-style-type: none">• ~250 computer science graduates annually
	2+ years of relevant work experience	
	Low	Low
The Legal Specialist	<ul style="list-style-type: none">• No notable / global players operating in the AI / machine learning field	<ul style="list-style-type: none">• Industry dominated by startups (no more than 10 to 20) – most with funding <\$100k• Other industries (e.g., banking, etc.) hiring very few data and AI analysts
	< 2 years of relevant work experience	
	Low	Medium
	<ul style="list-style-type: none">• No Lebanese law university programs on list of top law programs worldwide	<ul style="list-style-type: none">• Between 300 to 400 law graduates annually
	2+ years of relevant work experience	
The Business Strategist	Low	Medium
	<ul style="list-style-type: none">• No notable / global law firms operating in the country	<ul style="list-style-type: none">• 10k+ registered lawyers in the Syndicate – about 50% of which are practicing and have obtained their licenses
	High	
	<ul style="list-style-type: none">• Global consulting firms established in country (e.g., Strategy&, Kearney)	<ul style="list-style-type: none">• Abundancy of management consultants (incl. freelancers), as well as unemployed fresh graduates from top universities that, if properly trained, can fit role
	High	
The Design Engineer	High	High
	<ul style="list-style-type: none">• 1 civil engineering university program in top 700 worldwide• Notable players with strong local talent base operating in the field (e.g., Dar Al-Handasah)	<ul style="list-style-type: none">• Well-established and reputable design firms, such as Dar Al-Handasah and Khatib & Alami, employing 1.5k+ employees• ~1,500 engineering and architecture graduates annually
The Audiovisual Maker	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">• No Lebanese media university programs on list of top media programs worldwide	<ul style="list-style-type: none">• <100 audiovisual, media, and tv/ film graduates annually
	2+ years of relevant work experience	
	Medium	Low
	<ul style="list-style-type: none">• Notable media outlets with regional outreach and strong local talent base operating in the country (e.g., MTV, LBCI)	<ul style="list-style-type: none">• Very few small players operating as pure audiovisual makers; however, many of the marketing firms also have internal audiovisual makers

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Marketing Guru	< 2 years of relevant work experience	
	Medium	Medium
	<ul style="list-style-type: none"> 2 marketing university programs in top 700 worldwide (American University of Beirut and Lebanese American University) 	<ul style="list-style-type: none"> ~400 marketing graduates annually
	2+ years of relevant work experience	
The Graphic Designer	Medium	Medium
	<ul style="list-style-type: none"> Existing marketing ecosystem in place with notable / global players (e.g., Leo Burnett) 	<ul style="list-style-type: none"> Existing marketing ecosystem with 10 to 20 SMEs (10 to 50 employees each), most of which serve markets beyond Lebanon
	< 2 years of relevant work experience	
	Low	Low
The Doctor	<ul style="list-style-type: none"> Only 1 art & design university program in top 700 worldwide (Lebanese University) 	<ul style="list-style-type: none"> <200 graphic design graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none"> No notable / global players operating in the marketing field 	<ul style="list-style-type: none"> Very few small players operating as pure graphic designers; however, many of the marketing firms also have internal graphic designers
The Educator	< 2 years of relevant work experience	
	High	High
	<ul style="list-style-type: none"> 3 medical university programs rank in top 700 worldwide (American University of Beirut, Université Saint-Joseph, and Lebanese University) 	<ul style="list-style-type: none"> ~600 medical doctor graduates annually
	2+ years of relevant work experience	
	High	High
	<ul style="list-style-type: none"> Several renowned hospitals with regional outreach in the country (e.g., American University of Beirut Medical Center, Hôtel Dieu de France) 	<ul style="list-style-type: none"> ~15k+ registered medical doctors in the Syndicate 21 doctors per 10k people
	High	High
	<ul style="list-style-type: none"> High ranking (18th in the world) for quality of education system 	<ul style="list-style-type: none"> ~9% of employed population working in the education sector ~16 EdTech startups, a number of which have gained global recognition for their solutions

12.5.2 RECOMMENDATIONS

Clusters and areas of focus were categorized into quick to market and require enabling.

Figure 114 - Lebanon supply-side areas of focus categorization

Backup: assessment of areas of focus against supply-side criteria, clusters ticking all three criteria are deemed "quick to market"

Clusters of focus	Labor qualifications	Labor availability	Supporting ecosystem
CRM services (incl. call centers etc.)	✓	✓	✓
Engineering design and consulting services	✓	✓	✓
Business consulting and market research	✓	✓	✓
Software and apps dev., integration, implementation & management	✓		✓
Marketing services	✓		✓
Telemedicine and remote education services provision	✓	✓	

12.6 Jordan

12.6.1 VALUE PROPOSITION

The five key pillars for a successful talent pool ecosystem for job outsourcing were assessed to identify Jordan’s value proposition and competitive advantages.

PILLARS	DIMENSIONS	KEY FINDINGS
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">43% of population have high school & above education and 20% have university degreesThere are high enrollment levels in higher education with 340k enrolled students (4.6% of population)Jordan is home to world-class universities such as University of Jordan that is ranked 10th in the Arab world and 80% of the universities offer IT-related programsJordan ranks 43rd in quality of education system and 62nd in quality of math and science education
	Language proficiency	<ul style="list-style-type: none">Most of the population is fluent in verbal and written Arabic with a literacy rate of 98%Jordan ranks low in the EF English Proficiency Index; however, many educated Jordanians have high bilingual proficiency in Arabic and English as they are both the primary languages of the country’s education system
	Labor availability	<ul style="list-style-type: none">Jordan ranks 63rd in the 2021 Global Talent Competitiveness Index (GTCI)Labor force is nearly 2.7M with 50k new graduates joining the labor force annuallyUnemployment rate is high (23% overall and 32% for youth) due to mismatch between skills needed by job market & education output92% of the population lives in urban areas with access to decent telecomQualified and highly skilled labor is available<ul style="list-style-type: none">22% of university graduates hold degrees in IT, Computer Science and Engineering35% of unemployed people have university and above educationRanks 21st out of 134 countries in ease of finding skilled employees in the 2021 GTCI
	Labor cost	<ul style="list-style-type: none">Jordan offers a pool of highly cost competitive labor<ul style="list-style-type: none">Ranks high in financial attractiveness of outsourcing in 2016 Global Services Location Index

PILLARS	DIMENSIONS	KEY FINDINGS
Market environment	Political stability	<ul style="list-style-type: none">Jordan’s political risk score is medium and evaluated at 2.4 (where scores > 3.2 are deemed high)Ranks 83rd out of 134 countries in political stability in 2019
	Economic stability	<ul style="list-style-type: none">Jordan’s economic risk score is low and evaluated at 2.1 (where scores > 3.2 are deemed high)Jordan’s GDP increased from US\$41 billion in 2021 and is currently growing at 2.2% annuallyJordan ranks 4th across MENA countries in economic freedom in 2018
	Proximity to well-known demand hot spots	<ul style="list-style-type: none">Jordan is strategically located close to well-known regional and global demand hot spotsNo time difference with many GCC and European countries such as Saudi Arabia, Qatar, Bahrain, United Kingdom and Greece<ul style="list-style-type: none">1–2-hour time difference with GCC and other MENA countries such as the United Arab Emirates and EgyptGlobal companies, especially in GCC and Europe, can benefit from such a time zone advantage
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none">Language is a key cultural differentiator for Jordan connecting it to GCC countries<ul style="list-style-type: none">Jordan’s official language is Arabic. In addition, many qualified labors speak EnglishThe Jordanian diaspora, mainly concentrated in GCC, Europe and Americas, also plays a pivotal role in bridging the cultural gap between Jordan’s and the other countries’ cultures





PILLARS	DIMENSIONS	KEY FINDINGS
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> Internet penetration in Jordan reached 66.8% versus global penetration of 63% Jordan's median mobile internet speed reached 19 Mbps (30% growth from 2021) and median fixed internet speed reached 53 Mbps The country has 99% 4G, fiber and broadband internet coverage, and 5G coverage will be introduced soon
	Digital maturity levels	<ul style="list-style-type: none"> Jordan ranks high in the GovTech Maturity Index (GTMI) in 2020 <ul style="list-style-type: none"> GTMI measures the level of a government's investment in ICT infrastructure and the availability of digital government institutions and policies Government launched a 4-year National Digital Transformation in 2021 with the goal of using data processing and AI technologies to digitally transform vital sectors such as energy and finance sectors
	Physical infrastructure readiness	<ul style="list-style-type: none"> Jordan has severe water scarcity; however, over 98% of the population has access to improved water sources and nearly 100% of the population has access to electricity Jordan ranks 59th out of 141 countries in quality of road infrastructure The country's public transportation sector is underdeveloped and faces a lot of challenges in terms of high costs, poor coverage, low quality regional disparities and low capacity
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Jordan offers abundant A-class office space, available in both the capital and urban cities, offering prime infrastructure, connectivity, and a vibrant business environment Co-working spaces with proper infrastructure (internet, electricity, etc.) are offered for freelancers, such as: Coworker, Regus, and Antwork

PILLARS	DIMENSIONS	KEY FINDINGS
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Government has been providing several incentives to improve business climate leading Jordan to climb 29 spots in the ease of doing business ranking between 2019 & 2020 (From 104th to 75th). These incentives include: <ul style="list-style-type: none"> 0% income tax on revenues from ICT exports and no customs fees on ICT production inputs BPO services park enabling global firms to undertake back-office business in the country Corporate incomes taxes are fixed at 14% - relatively low compared to peers (e.g., Egypt, Lebanon)
	Special economic zones' availability	<ul style="list-style-type: none"> Jordan has a well-established system consisting over 14 development and free zones Incentives provided to companies in the zones include tax exemptions, exemptions from customs duties on imports/exports, 100% foreign ownership guarantees, facilitated visa permits, and ease of return of capital and profits to the country of origin
	Data and IP protection laws	<ul style="list-style-type: none"> Jordan has no data protection laws in place and no regulatory body dedicated to governing data protection; however, there is a Data Protection Law being currently drafted The country passed several laws in line with international commitments to protect intellectual property rights and is a signatory to World Intellectual Property Organization (WIPO) treaties and to the Patent Cooperation Treaty and the Madrid Protocol
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Government is actively involved in enabling easy setup of outsourcing businesses <ul style="list-style-type: none"> For example, government has 7 free trade agreements with countries such as the US granting Jordanians access to 1.5B customers, and has 55 bilateral investment treaties There are no specific regulations that exist to govern job matching platforms in the country

PILLARS	DIMENSIONS	KEY FINDINGS
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Ministry of Digital Economy and Entrepreneurship developed programs to train unemployed youth: <ul style="list-style-type: none"> “Graduate Internship Program”: providing youth with job placement opportunities & covering 50% of their wages for the duration of the training (12 months) “National Upskilling ICT Program”: training 500 unemployed graduates annually on digital & soft skills Partnering with public and private organizations such as Al Qusour Academy and Microsoft to provide free digital training programs to unemployed Jordanian youth in order to address the shortage of digital talent in Jordan
	Private sector efforts	<ul style="list-style-type: none"> Many private companies do not offer enough formal training within their firms <ul style="list-style-type: none"> Jordan ranks 97th out 108 countries in prevalence of training in firms (2021 GTCI) Corporations developed partnerships to skill, re-skill and upskill Jordanian youth <ul style="list-style-type: none"> Orange Jordan and Ericsson partnered to deliver a digital learning program aiming to skill, re-skill and upskill job-seeking ICT sector graduates by providing courses on data science, automation, AI and machine learning
	Not-for-profit institutions’ efforts	<ul style="list-style-type: none"> Jordan is home to several non-profits that launched multiple initiatives to skill, re-skill and upskill talent across multiple areas related to future of work, including digital and technology <ul style="list-style-type: none"> Organizations such as UNICEF launched an impact sourcing platform, to provide Jordanian youth with digital skills trainings, and to connect freelancers from underserved communities with different employment opportunities Other organizations include: UNICEF, Leaders International, Spark, and UNHCR

Figure 115 - Not-for-profit training programs in Jordan

Deep dive: several training programs launched by non-profits to skill, re-skill and upskill talent in the country

				
Objective	Provide youth with digital skills training and connect freelancers from underserved areas with employment opportunities	Stimulate innovation and engage Jordanian talent in global digiwork opportunities	Support young graduates in developing their skills to increase chances of employability	Deliver highlevel training in coding skills to refugees and underprivileged Jordanian youth
Program design	Basic and advanced digital skills trainings and connecting youth to potential employers through the B.O.T platform	Online course focusing on digital and technical skills needed for entrepreneurs to start their online freelancing careers	Online "work ready skills" curriculum to provide fresh graduates with relevant skills needed for the job market	A tuitionfree and teacher-less coding and programming school in Amman training youth pursuing a career in coding and software development
Target audience	Vulnerable youth aged 17-24	Young Jordanian entrepreneurs	Unemployed Jordanian university graduates	Vulnerable Jordanian youth and refugees
Impact	3000+ participants	890+ participants	850 participants	300 participants annually
Key offering components	Trainings on communication, computer and IT skills, and job placement opportunities	Training program on digital, soft, financial and digital marketing skills, and on different freelancing platforms	Technical and soft skills online courses along with an internship placement scheme	Courses in UI/UX design, coding, software development, web design and soft skills
Length	N/A	15 hours	3 to 6 months	18 months
Delivery model	Online training sessions	Online training sessions	Online training sessions and physical internship program	Online training sessions

12.6.2 REMOTE WORK TALENT PERSONAS

Twelve different remote work talent personas suitable for

outsourcing were identified and analyzed to assess talent qualification and abundance in Jordan.

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Operator	High <ul style="list-style-type: none"> High ranking (31st out 141 countries) on digital skills Bilingual labor 	High <ul style="list-style-type: none"> ~45% of workforce with high school and above level of education
	Medium <ul style="list-style-type: none"> Only 1 finance & accounting university program in top 700 worldwide (University of Jordan) 	Medium <ul style="list-style-type: none"> ~1.5% of workforce in finance & insurance sector 3k+ accounting graduates annually
The Functional Tech Guru	< 2 years of relevant work experience	
	High <ul style="list-style-type: none"> 4 computer engineering university programs in top 700 worldwide 	Medium <ul style="list-style-type: none"> ~8k computer and software engineering graduates annually
	2+ years of relevant work experience	
	Medium <ul style="list-style-type: none"> Some global players (e.g., Microsoft) operating in computer engineering field 	Low <ul style="list-style-type: none"> ~1.2% of the workforce part of the ICT sector
The Specialized Tech Guru	< 2 years of relevant work experience	
	High <ul style="list-style-type: none"> 4 computer science university programs in top 700 worldwide 	Low <ul style="list-style-type: none"> <1k computer science graduates annually
	2+ years of relevant work experience	
	Low <ul style="list-style-type: none"> No notable players operating in the AI / machine learning field 	Low <ul style="list-style-type: none"> Low supply of experienced computer scientists, data scientists, AI, and machine learning specialists
The Legal Specialist	< 2 years of relevant work experience	
	Low <ul style="list-style-type: none"> No Jordanian law university programs on list of top programs worldwide 	Medium <ul style="list-style-type: none"> ~2k law graduates annually
	2+ years of relevant work experience	
	Medium <ul style="list-style-type: none"> Some notable regional firms with offices in Jordan (e.g., Eversheds Sutherland LLP) 	Medium <ul style="list-style-type: none"> 13k+ practicing lawyers – all of which are registered in the Bar Association

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Business Strategist	Medium <ul style="list-style-type: none"> Global consulting firms established in country (e.g., KPMG & PwC) 	Medium <ul style="list-style-type: none"> Abundancy of business professionals and fresh business graduates (10k annually) that, if properly trained, can fit the role
The Design Engineer	Medium <ul style="list-style-type: none"> Only 1 engineering university program ranks in top 700 worldwide (Jordan University of Science and Technology) 	High <ul style="list-style-type: none"> ~10k engineering and architecture graduates annually ~180k engineers in the country
The Audiovisual Maker	< 2 years of relevant work experience	
	Low <ul style="list-style-type: none"> No Jordanian media university programs on list of top media programs worldwide 	Low <ul style="list-style-type: none"> ~500 audiovisual, media, and tv/ film graduates annually
	2+ years of relevant work experience	
	Low <ul style="list-style-type: none"> No media outlets with regional outreach operating in the country 	Low <ul style="list-style-type: none"> ~0.2% of workforce in entertainment and media sector
The Marketing Guru	< 2 years of relevant work experience	
	Medium <ul style="list-style-type: none"> Only 1 marketing university program in top 700 worldwide (University of Jordan) 	Medium <ul style="list-style-type: none"> ~2k marketing graduates annually
	2+ years of relevant work experience	
	Medium <ul style="list-style-type: none"> Some regional companies established in the country (e.g., Publicis Media) 	Medium <ul style="list-style-type: none"> Growing advertising and marketing industry with 100+ agencies serving local and regional clients
The Graphic Designer	< 2 years of relevant work experience	
	Low <ul style="list-style-type: none"> No Jordanian university programs on list of top art and design programs worldwide 	Low <ul style="list-style-type: none"> ~500+ graphic design graduates annually
	2+ years of relevant work experience	
	Low <ul style="list-style-type: none"> No notable / global players operating in the graphic design field 	Low <ul style="list-style-type: none"> Small pool of graphic designers in marketing agencies and freelancers on top job matching platforms

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Doctor	< 2 years of relevant work experience	
	Medium <ul style="list-style-type: none"> 2 medical university programs rank in top 700 worldwide (University of Jordan & Jordan University of Science and Technology) 	Medium <ul style="list-style-type: none"> ~1.6k medical doctor graduates annually
	2+ years of relevant work experience	
	High <ul style="list-style-type: none"> Several renowned hospitals (3) among top 1000 hospitals worldwide 	High <ul style="list-style-type: none"> ~30k doctors working in the country 28 doctors per 10k people
The Educator	Medium <ul style="list-style-type: none"> Medium ranking (43rd in the world) for quality of education 	High <ul style="list-style-type: none"> ~8.5% of employed population working in the education sector

12.6.3 RECOMMENDATIONS

Clusters and areas of focus were categorized into quick to market and require enabling.

Figure 116 - Jordan supply-side areas of focus categorization

Backup: assessment of areas of focus against supply-side criteria, clusters ticking all three criteria are deemed "quick to market"

Clusters of focus	Labor qualifications	Labor availability	Supporting ecosystem
CRM services (incl. call centers etc.)	✓	✓	✓
Software and apps dev., integration, implementation & management	✓		✓
Engineering design and consulting services	✓	✓	✓
Finance and accounting services		✓	✓
Business consulting and market research	✓	✓	✓
Telemedicine and remote education service provision	✓	✓	

12.7 Iraq

12.7.1 VALUE PROPOSITION

The five key pillars for a successful talent pool ecosystem

for job outsourcing were assessed to identify Jordan’s value proposition and competitive advantages.

PILLARS	DIMENSIONS	KEY FINDINGS
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">• ~60% of youth, largest segment of population, lack digital skills needed for employment• Today, there are ~3.2 million school-aged Iraqi children out of school• Only ~19%3 of college-age population in Iraq have access to tertiary education• Iraq is home to few renowned higher-education institutions, with the exception of University of Baghdad that ranks in top 30 in Arab region and top 1,000 worldwide (QS University Rankings)
	Language proficiency	<ul style="list-style-type: none">• Iraqis have strong verbal and written proficiency in Arabic (literacy rate of 85%)• Arabic and Kurdish are Iraq’s official languages• English is the only compulsory foreign language taught in Iraqi schools at present• English is a mandatory subject in the Iraqi educational system from the 1st to the 12th grades
	Labor availability	<ul style="list-style-type: none">• There is high abundance of job-seeking Iraqis - the country is facing a job crisis with incredibly low employment opportunities• National unemployment rate is estimated at ~14.2% in 2021• Iraq has one of the lowest employment-to-total population ratios in the region (ILO)• More than 25% of tertiary education graduates are unemployed or inactive in the labor market• ~25% of the working-age population is underutilized – either unemployed or underemployed• Iraq’s private sector, which accounts to roughly 40% to 50% of employment, is mainly informal<ul style="list-style-type: none">– Compared to the public sector, employment in the private sector has lower average wages, job security, and benefits, and often lacks formal contracts
	Labor cost	<ul style="list-style-type: none">• Iraq’s workforce is cost competitive<ul style="list-style-type: none">– Graduate software engineers in Iraq earn an average annual salary of ~\$10k – relatively low compared to peers (E.g., Tunisia)

PILLARS	DIMENSIONS	KEY FINDINGS
Market environment	Political stability	<ul style="list-style-type: none">• Iraq’s political risk is high (4.0 – where scores > 3.2 are deemed high), among the highest in MENA and globally
	Economic stability	<ul style="list-style-type: none">• Iraq’s economic risk score is medium (2.7 – where scores > 3.2 are deemed high)• GDP is estimated to have edged up by 1.3% in 2021, after a sharp contraction of 11.3% in 2020• Inflation rates on consumer prices reached ~6% in 2021• The country’s excessive dependence on oil exposes it to macro-economic volatility• However, Iraq’s economic conditions are gradually improving as international oil markets recover and the easing of COVID 19 restrictions restore domestic economic activity
	Proximity to well-known demand hot spots	<ul style="list-style-type: none">• Iraq is strategically located close to well-known regional and global demand hot spots:<ul style="list-style-type: none">– No time difference with Saudi Arabia and Qatar– 1-hour time difference with United Arab Emirates (UAE) and major European counties• Global companies, especially American and East Asian, can benefit from a time zone advantage given the geographical, central location of the country
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none">• Iraq’s official language is Arabic, and many qualified labors speak English, connecting the country to several Arabic-speaking and English-speaking countries• Iraqi diaspora, one of the largest in modern times due to the wars that hit the country, is concentrated the US, Europe, and the Middle East, and can play a pivotal role in bridging the cultural gap between Iraq and the other countries

PILLARS	DIMENSIONS	KEY FINDINGS
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> Internet penetration in Iraq reached 50% in 2021 versus global of 63% Telecom services and infrastructure were damaged due to the wars that hit the country Operators have struggled to develop LTE services, because of damaged infrastructure and wrangles with the government and regulator concerning the conditions of their licenses Optic fiber is very limited as investment and competition in its provision is extremely limited due to government's exclusive authority over fiber, making prices highest in the region
	Digital maturity levels	<ul style="list-style-type: none"> Iraq's digital maturity is low <ul style="list-style-type: none"> Iraq ranks low in the GovTech Maturity Index Public-sector platforms (e.g., e-government), including online business registration, are still in early phases, and private-sector platforms (e.g., e-commerce) are still nascent In July 2022, the UNDP signed under a Memorandum of Understanding with the government to assess the digital landscape in Iraq and develop a roadmap for main priorities of digital transformation
	Physical infrastructure readiness	<ul style="list-style-type: none"> Despite the country's vast oil and gas reserves, Iraqis do not have access to adequate electricity for basic needs The quality of water and sanitation services is also low, unequal, and inconsistent: only 28% of the population has access to a piped sewerage network Transport system is fragmented, forming an obstacle to national and regional development In all priority infrastructure sectors, role of the private sector is limited in depth and coverage
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> A limited number of co-working spaces with adequate infrastructure (internet, electricity, etc.) is offered for freelancers and entrepreneurs, such as The Station, Erbil Innovation House, CoWork, Business Avenue, and Tech Hub

PILLARS	DIMENSIONS	KEY FINDINGS
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Foreign investors are offered some financial and non-financial incentives <ul style="list-style-type: none"> E.g., 10-year tax exemption, import duties exemptions and ability to repatriate capital brought into Iraq and to trade on the Iraqi Stock Exchange Iraq has 32 bilateral trade agreements worldwide and 9 FTAs with MENA countries; however, the FTAs are currently suspended pending a review by the government Corporate income taxes are relatively low and fixed at 15% with no progressive tax rate scale
	Special economic zones' availability	<ul style="list-style-type: none"> Iraq is home to 4 official free zones offering significant incentives including customs exemption, VAT exemption, offshore banking permission, etc. Several relevant activities are permitted in the free zones (e.g., trading operations and banking, insurance and service activities) More zones are being developed to boost economic cooperation (e.g., joint zone with Jordan)
	Data and IP protection laws	<ul style="list-style-type: none"> Iraq has IP-related laws in the penal code and is a signatory to the World Intellectual Property Organization and the Patent Cooperation Treaty There is no codified law which governs data protection; data protection is rather governed briefly under various laws (e.g., Constitution, Penal Code, Civil Code among other laws)
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Government has weak involvement when it comes to enabling easy setup of outsourcing businesses <ul style="list-style-type: none"> Involvement is limited to the provision of financial and non-financial incentives Iraq has 32 bilateral trade agreements worldwide and 9 FTAs with MENA countries; however, the FTAs are currently suspended pending a review by the government There are no specific regulations that exist to govern job matching platforms in the country

PILLARS	DIMENSIONS	KEY FINDINGS
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Government has implemented multiple initiatives to skill, re-skill and upskill talent: <ul style="list-style-type: none"> The Ministry of Communications has its own training institution and employs many of its own graduates in its workforce of approximately 13,000 Ministry of Electricity holds multiple workshops to train unemployed young people who do not have a university degree in the areas of maintenance of electrical transformers However, skills development initiatives are not comprehensive and inclusive: Youth, women and poorer groups in various parts of Iraq urgently need more access to training opportunities
	Private sector efforts	<ul style="list-style-type: none"> Many private companies do not offer enough formal training within their firms: <ul style="list-style-type: none"> Only ~20% of private firms offer formal trainings to their employees Some large firms offer training opportunities to skill, re-skill and upskill Iraqi talent: <ul style="list-style-type: none"> Zain Iraq, in collaboration with Ericsson, organized a one-month training in telecommunications for 24 top graduates from different universities across Iraq Asiacell signed an MoU with the UNDP to implement several initiatives, including supporting young entrepreneurs and start-ups in developing innovative solutions to local challenges
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Iraq is home to several non-profits that launched multiple initiatives to skill, re-skill and upskill talent across multiple areas related to future of work, including digital and technology <ul style="list-style-type: none"> Iraqi Innovators is a social impact organization with a mission to increase women's involvement in the tech sector and train job seekers (women are prioritized) Other organizations include UNDP, UNICEF, Spark, ILO, and Seed

Figure 117 - Not-for-profit training programs in Iraq

Deep dive: several training programs launched by non-profits to skill, re-skill and upskill talent in the country

	amideast American Middle East Center	UNO	unicef	Non-exhaustive UNDP
Objective	Equip Iraqi youth and young professionals with transferable skills needed to help them succeed in the job market	Train trainers to support young refugees, displaced people, & vulnerable community members on setting up small businesses or improve existing ones	Help Iraqi students catch up on missed classes while providing safe spaces for children to process the upheaval they have experienced	Organize an apprenticeship project that include on-the-job training
Program design	Trainings in the areas of business English, employability and technical skills	Train trainers on relevant training package Trainer would then deliver the training across to youth	Summer school programs in Baghdad, Kerbala, Babil, Diyala and Wasset Governorates	Collaboration with over 226 enterprises and private sector companies to link apprentices to local jobs
Target audience	Fresh graduates and entry-level professionals	Trainers from a wide range of financial institutions and NGOs	Students aged 6 to 16	Young, unemployed people
Impact	Selected group of participants from Iraqi youth population	20 trainers from 12 different organizations	7,220 students	300 young participants
Key offering components	Courses on communication, technical skills needed in the workplace and internship placement opportunities	Theoretical and practical topics on generating a business idea, setting-up a business, and improving existing businesses	School subjects (e.g., English) Discussion groups (conflict resolution, respect of others) Extra-curricular activities (sports)	Practical skills required by employers (e.g., financial management, client relations, inventory keeping etc.)
Length	N/A	Two weeks	1 month	3 months
Delivery model	Physical training sessions	Physical workshop	Physical sessions	Physical training sessions

12.7.2 REMOTE WORK TALENT PERSONAS
Twelve different remote work talent personas suitable for

outsourcing were identified and analyzed to assess talent qualification and abundance in Iraq.

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Operator	Low	High
	<ul style="list-style-type: none"> ~60% of youth lacking digital skills needed for employment Bilingual labor 	<ul style="list-style-type: none"> ~45% of workforce with high school and above level of education
The Finance & Accounting Specialist	Low	Medium
	<ul style="list-style-type: none"> No finance and accounting university programs on list of top programs worldwide Some accounting firms serving local clients (e.g., Deloitte) 	<ul style="list-style-type: none"> ~0.5% of workforce in finance & insurance sector
The Functional Tech Guru	< 2 years of relevant work experience	
	Low	Medium
	<ul style="list-style-type: none"> Only 1 computer engineering university program in top 700 worldwide (University of Baghdad) 	<ul style="list-style-type: none"> 11k+ ICT graduates from university and TVET programs annually
	2+ years of relevant work experience	
The Specialized Tech Guru	Low	Medium
	<ul style="list-style-type: none"> No notable / global firms operating in software or computer engineering field 	<ul style="list-style-type: none"> ~3% of the workforce part of the ICT sector
	< 2 years of relevant work experience	
	Low	Low
The Legal Specialist	<ul style="list-style-type: none"> Only 1 computer engineering university program in top 700 worldwide (University of Baghdad) 	<ul style="list-style-type: none"> ~2k computer science graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none"> No notable / global players operating in the AI / machine learning field 	<ul style="list-style-type: none"> Low supply of computer scientists, data scientists, AI, and machine learning specialists due to the country's underdeveloped digital ecosystem
The Legal Specialist	< 2 years of relevant work experience	
	Low	Medium
	<ul style="list-style-type: none"> No Iraqi law university programs on list of top law programs worldwide 	<ul style="list-style-type: none"> ~10k+ law graduates annually
	2+ years of relevant work experience	
The Legal Specialist	Low	Medium
	<ul style="list-style-type: none"> No notable / global law firms in the country 	<ul style="list-style-type: none"> ~70k lawyers registered in the bar association

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Business Strategist	Low	Medium
	<ul style="list-style-type: none"> No notable consulting firms operating in the country 	<ul style="list-style-type: none"> Abundancy of fresh business graduates (15k+ annually) that, if properly trained, can fit the role
The Design Engineer	Low	Medium
	<ul style="list-style-type: none"> No Iraqi civil engineering university programs on list of top law programs worldwide 	<ul style="list-style-type: none"> ~10k engineering and architecture graduates annually
The Audiovisual Maker	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none"> No Iraqi media university programs on list of top media programs worldwide 	<ul style="list-style-type: none"> ~500 audiovisual, media, and tv/ film graduates annually
	2+ years of relevant work experience	
The Marketing Guru	Low	Low
	<ul style="list-style-type: none"> No notable media outlets with regional outreach operating in the country 	<ul style="list-style-type: none"> Unattractive media industry with the loss of skilled talent following the wars in Iraq; however, industry gradually being developed and encouraged
	< 2 years of relevant work experience	
	Low	Low
The Graphic Designer	<ul style="list-style-type: none"> No Iraqi marketing university programs on list of top programs worldwide 	<ul style="list-style-type: none"> <1k marketing graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none"> No notable / global players operating in the marketing field 	<ul style="list-style-type: none"> Undeveloped marketing ecosystem with a low supply of marketing professionals
The Graphic Designer	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none"> No Iraqi art & design university programs on list of top programs worldwide 	<ul style="list-style-type: none"> <500 graphic design graduates annually
	2+ years of relevant work experience	
The Graphic Designer	Low	Low
	<ul style="list-style-type: none"> No notable / global players operating in the marketing field 	<ul style="list-style-type: none"> Small pool of graphic designers in marketing agencies and freelancers on job matching platforms

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Doctor	< 2 years of relevant work experience	
	Low	Medium
	<ul style="list-style-type: none"> Only 1 medical university program in top 700 worldwide (University of Baghdad) 	<ul style="list-style-type: none"> ~8.5k medical doctor graduates annually
	2+ years of relevant work experience	
The Educator	Low	Medium
	<ul style="list-style-type: none"> No renowned hospitals with regional outreach in the country 	<ul style="list-style-type: none"> ~35k doctors working in the country
	2+ years of relevant work experience	
	Low	High
The Educator	<ul style="list-style-type: none"> Weak and fragmented educational system massively affected by wars and conflicts 	<ul style="list-style-type: none"> ~9.3% of employed population working in the education sector

12.7.3 RECOMMENDATIONS

Clusters and areas of focus were categorized into quick to market and require enabling.

Figure 118 - Iraq supply-side areas of focus categorization

Backup: assessment of areas of focus against supply-side criteria, clusters ticking all three criteria are deemed "quick to market"

Clusters of focus	Labor qualifications	Labor availability	Supporting ecosystem
CRM services (incl. call centers, etc.)	<div>✓</div> Quick skilling initiatives can take place to prepare workforce	<div>✓</div>	<div>✓</div>
Content and document processing	<div>✓</div> Quick skilling initiatives can take place to prepare workforce	<div>✓</div>	<div>✓</div>
Human resource management		<div>✓</div>	
IT consulting and support		<div>✓</div>	

12.8 Egypt

12.8.1 VALUE PROPOSITION

The five key pillars for a successful talent pool ecosystem

for job outsourcing were assessed to identify Jordan’s value proposition and competitive advantages.

PILLARS	DIMENSIONS	KEY FINDINGS
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">Higher education participation rate evaluated at 30% and is estimated to reach 40% by end of 2022Egypt has the largest Education system in the MENA region with 25M students currently enrolled in pre-university education and 2.6M students currently in higher educationEgypt is home to 4 world-class universities, such as AUC, that are ranked in top 15 in Arab regionTechnological universities focusing on increasing tech-based employment are growingEgypt ranks 130th for in quality of education, and 122nd for quality of Math and Science Education
	Language proficiency	<ul style="list-style-type: none">Egyptians have high written and verbal proficiency in Arabic (75% literacy rate)Egypt ranks low in English Proficiency Index; however, most educated Egyptians are bilingual where 35% of Egyptians speak English
	Labor availability	<ul style="list-style-type: none">Egypt ranks 89th in the 2021 Global Talent Competitiveness IndexAs of 2019 there have been 604k higher education graduates joining the labor force annually, a 6.2% increase compared to previous years<ul style="list-style-type: none">Includes 200,000 graduates from BPO related fields and 50,000 from IT related fieldsLabor force is estimated at ~ 30M with an unemployment rate of 7.4% (50% with high school & above education)43% of the population lives in urban areas, meaning that many of the labor have access to decent telecom infrastructure or live in proximity to well-equipped co-working spacesQualified labor is readily available: unemployment level highest for people with university & aboveeducation (15.7%)
	Labor cost	<ul style="list-style-type: none">Egypt offers one of the most competitive operating cost per full-time employee<ul style="list-style-type: none">E.g., Average annual software developer salary is \$7,500 which is 60% less than labor cost for software developers in popular outsourcing destinations such as Bulgaria, Romania or PolandEgypt ranks 1st in affordability of talent regionally

PILLARS	DIMENSIONS	KEY FINDINGS
Market environment	Political stability	<ul style="list-style-type: none">Egypt’s political risk score is medium and evaluated at 2.3 (where scores > 3.2 are deemed high)Egypt ranks 118th in political stability (2021 Global Talent Competitiveness Index)
	Economic stability	<ul style="list-style-type: none">Economic risk score is medium and evaluated at 2.9 (where scores > 3.2 are deemed high) and real GDP increased at a CAGR of 17% from about \$\$390B in 2018 to \$420B in 2020, and expected to grow by 5.5% in FY20211/22Egypt is home to the 4th largest startup ecosystem in Africa (500+) and to 20% of Africa’s tech startupsEgypt has been affected by rising inflation (13.15%) and rising net exports deficit from the devaluation of the EGPGovernment has set economic development plan “Vision 2030” to increase GDP per capita, ease of doing business score, share of world GDP and net foreign direct investment (FDI)
	Proximity to well-known demand hot spots	<ul style="list-style-type: none">Egypt is strategically located close to well-known regional and global demand hot spots:<ul style="list-style-type: none">No time difference with many European countries such as Spain, Italy and France1–2-hour time difference with GCC countries such as United Arab Emirates (UAE), Saudi Arabia and QatarGlobal companies, especially in Europe & MENA, can benefit from a time zone advantage given the geographical, central location of the country
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none">Language is a key cultural differentiator for Egypt connecting it to GCC countriesEgypt has a large number of expatriates (~ 8M) residing in other Arab, European and American countries, and helping to bridge the cultural gap between Egypt and such countries

PILLARS	DIMENSIONS	KEY FINDINGS
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> Internet penetration in Egypt reached 72% in 2022 with nearly 76M internet users Egypt ranks 4th in Africa & 8th in the Arab world in the internet speed index and connection speed is growing where it increased from 6.5 Mbps in 2019 to 45.9 Mbps in 2020 The well-established fiber-optic network is currently being extended to rural areas with a 2021 initiative connecting them to 1413 villages in 20 governorates 2Africa subsea cable project is in the pipeline to improve connectivity further
	Digital maturity levels	<ul style="list-style-type: none"> Egypt ranks high in the GovTech Maturity Index (GTMI), among top 10 improvers in Digital Inclusion Index, leads North African countries in Network Readiness Index rankings for 2020 The country is also allocating nearly \$315M in the 2022-23 fiscal budget for investment in digital transformation and cybersecurity projects Government injected ~\$1B in investments for ICT and digital transformation between 2016 and 2020
	Physical infrastructure readiness	<ul style="list-style-type: none"> Egypt has a relatively developed infrastructure where 100% of the population has access to electricity. In addition, 98% of the population in urban areas and 84% in rural areas have access to safe drinking water Egypt's public transit sector faces a lot of challenges in terms of availability and quality; however, the government has allocated \$13B in FY21/2022 to develop the country's transport sector
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Egypt offers abundant A-class office space, available in both the capital and urban cities, offering prime infrastructure, connectivity, and a vibrant business environment Co-working spaces with proper infrastructure (internet, electricity, etc.) are offered for freelancers, such as New Cube, 302 Labs, WeWork, MQR Spaces, and Woork Hub

PILLARS	DIMENSIONS	KEY FINDINGS
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Egypt's New Investment Law provides a series of incentives for investment projects are offered to foreign investors and international businesses in key sectors The Law protects provides investors several safeguards such as guaranteeing them residence in Egypt, granting them same legal treatment as nationals, and allowing for smooth transfer of profits abroad Corporate incomes taxes are fixed at 22.5% - relatively high compared to peers (e.g., Jordan, Lebanon)
	Special economic zones' availability	<ul style="list-style-type: none"> Egypt has a well-established system consisting of various zones located in strategic positions across the country with a wide range of sector focuses <ul style="list-style-type: none"> – E.g., The Suez Canal Economic Zone Incentives provided to companies in the zones include tax exemptions, exemptions from customs duties on imports/exports, and a no nationalization/confiscation guarantee
	Data and IP protection laws	<ul style="list-style-type: none"> Egypt introduced new Personal Data Protection Law in 2021 prohibiting the processing of personal data without the consent of the subject and reflects European General Data Protection Regulation (GDPR) Egypt does have a system in place to protect Intellectual Property Rights (IPR) with a special agency (Information Technology Development Agency) enforcing such laws; however, the system is not complete and is still undergoing updates and refinements
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Government has limited involvement in enabling easy setup of outsourcing businesses: <ul style="list-style-type: none"> – For example, several laws such as the New Investment Law to ease the delegation of support services to talent in Egypt through exemptions and guarantees There are no specific regulations that exist to govern job matching platforms in the country

PILLARS	DIMENSIONS	KEY FINDINGS
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Ministry of Communications and Information Technology (MCIT) launched scholarship programs and e-learning courses including software development courses to train youth in ICT related specializations allowing them to qualify to job market standards Government partnered with public and private organizations such as Egypt University of Informatics and Amazon to provide free professional training in building digital skills Government allocated over \$50M to train talent as a part of the “Our Digital Future” initiative Information Technology Industry Development Agency (ITIDA) offered scholarship to 350k professionals to provide training on remote work and web technologies
	Private sector efforts	<ul style="list-style-type: none"> Private organizations have partnered with the government to skill, re-skill and upskill youth <ul style="list-style-type: none"> Microsoft Egypt supported MCIT in their 2021 “Tawar W Ghayar” initiative where they provided training on digital and programming skills to train 200k young people per year Other organizations such as Cisco, BM, VMware, Valeo, AMS, Vodafone, Microsoft, Google, Dell Technologies and Huawei injected \$25M to train 3k students at schools in ICT-related fields There is a strong support network of private online training providers and EdTech startups in the country (e.g., Sprints, Noon Academy, Praxilabs, Educatly etc.)
	Not-for-profit institutions’ efforts	<ul style="list-style-type: none"> Egypt is home to several non-profits that launched multiple initiatives to skill, re-skill and upskill talent across multiple areas related to future of work, including digital and technology: <ul style="list-style-type: none"> Organizations such as Microsoft have partnered with the Egyptian NGOs such as United Nations Development Program in Egypt to train young professionals in computer science and provide digital literacy training Other organizations include: Egypt Innovate, British Council, UNDP, International Youth Foundation, Education for Employment, and Amideast

Figure 119 - Not-for-profit training programs in Egypt

Deep dive: several training programs launched by non-profits to skill, re-skill and upskill talent in the country

	amdeast	UNDP	eje	international youth foundation
Objective	Prepare unemployed youth with skills needed in the labor market to increase their employability	Develop digital literacy and specialized computer science training to train instructors and underprivileged youth	Provide unemployed youth training on digital and vocational skills that local businesses seek	Address the country's need for increased youth employment and entrepreneurship
Program design	Training in the areas of business English and digital skills followed an internship placement and on the job training	Cash grants provided by Microsoft to provide workshops in underserved areas, and to advance national education public policy of CS in Egypt	Job placement programs that train youth and link them to job opportunities in various sectors through the NGOs' partnerships	Training program provided in collaboration with local NGO "Nahdet El Mahrousa" and with funding by Mastercard
Target audience	Unemployed recent university graduates up to 27 years of age	Underserved youth in Egypt	Unemployed and job seeking university educated youth	Unemployed youth
Impact	200+ participants that found jobs after the program	250k+ participants	6000+ youth linked to employment	12k+ youth with 78% alumni finding jobs/ starting a business
Key offering components	Trainings on communication, computer and IT skills, entrepreneurship and personal development	Digital skills training and capacitybuilding for youth through workshops at youth centers, IT clubs and schools	Trainings on digital skills, soft and technical skills, workplace stimulations and mock interviews	Training in basic technical and life skills & customized trainings in finance, technical operations & project management
Length	10 months	N/A	3 to 6 weeks	N/A
Delivery model	Physical and online training sessions	Physical workshops	Physical and online training sessions	Physical training sessions

12.8.2 REMOTE WORK TALENT PERSONAS

Twelve different remote work talent personas suitable for

outsourcing were identified and analyzed to assess talent qualification and abundance in Egypt.

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Operator	Medium <ul style="list-style-type: none"> Medium ranking (44th out 141 countries) on digital skills Bilingual labor 	Very High <ul style="list-style-type: none"> 60% of workforce with high school and above level of education
The Finance & Accounting Specialist	Medium <ul style="list-style-type: none"> 2 accounting & finance university programs in top 700 worldwide (American University in Cairo & Cairo University) 	High <ul style="list-style-type: none"> ~0.5% of workforce in finance & insurance sector ~81k accountants & taxation graduates annually

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Functional Tech Guru	< 2 years of relevant work experience	
	High <ul style="list-style-type: none">6 computer engineering university programs in top 700 worldwide	High <ul style="list-style-type: none">~25k computer and software engineering graduates annually
	2+ years of relevant work experience	
	High <ul style="list-style-type: none">Several global players (e.g., Microsoft, IBM) operating in computer engineering field	Medium <ul style="list-style-type: none">~1% of the workforce part of the ICT sector
The Specialized Tech Guru	< 2 years of relevant work experience	
	High <ul style="list-style-type: none">6 computer science university programs in top 700 worldwide	Low <ul style="list-style-type: none">6k+ computer science graduates annually
	2+ years of relevant work experience	
	Low <ul style="list-style-type: none">No notable players operating in the AI / machine learning field (mainly small startups)	Low <ul style="list-style-type: none">High demand for data scientists (800+ postings); however, supply is limited as 1st undergraduate data science program was introduced in 2019
The Legal Specialist	< 2 years of relevant work experience	
	Low <ul style="list-style-type: none">Only 1 law university program in top 700 worldwide (Cairo University)	High <ul style="list-style-type: none">50k+ law graduates annually
	2+ years of relevant work experience	
	Medium <ul style="list-style-type: none">Some notable regional firms with offices in Egypt (e.g., Al Tamimi & Co)	High <ul style="list-style-type: none">500k+ registered lawyers in the Bar Association – all of which have obtained their license
The Business Strategist	Medium <ul style="list-style-type: none">Global consulting firms established in country (e.g., BCG, McKinsey)	Medium <ul style="list-style-type: none">Abundancy of management consultants (incl. freelancers), as well as unemployed fresh graduates from top universities that, if properly trained, can fit role
The Design Engineer	High <ul style="list-style-type: none">3 engineering university programs rank in top 700 worldwide (Cairo University, Alexandria University, & Ain Shams University)	High <ul style="list-style-type: none">~40k engineering and architecture graduates annually

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Audiovisual Maker	< 2 years of relevant work experience	
	Low <ul style="list-style-type: none">No Egyptian media university programs on list of top media programs worldwide	High <ul style="list-style-type: none">35k+ audiovisual, media, and tv/ film graduates annually
	2+ years of relevant work experience	
	High <ul style="list-style-type: none">Several media outlets with regional outreach operating in the country (e.g., MBC, OnTv)	High <ul style="list-style-type: none">~500k full-time and part-time employees in media and film production industry
The Marketing Guru	< 2 years of relevant work experience	
	Medium <ul style="list-style-type: none">Two marketing university programs in top 700 worldwide (American University in Cairo & Cairo University)	Medium <ul style="list-style-type: none">~20k marketing graduates annually
	2+ years of relevant work experience	
	High <ul style="list-style-type: none">Notable regional companies established in the country (e.g., FP7 McCann)	Medium <ul style="list-style-type: none">One of the region’s leading countries for digital marketing with over 500 agencies serving local & regional clients
The Graphic Designer	< 2 years of relevant work experience	
	Low <ul style="list-style-type: none">No Egyptian university programs on list of top art and design programs worldwide	Low <ul style="list-style-type: none">~2k graphic design graduates annually
	2+ years of relevant work experience	
	Low <ul style="list-style-type: none">No notable / global players operating in the marketing field	Low <ul style="list-style-type: none">Small pool of graphic designers in marketing agencies and freelancers on job matching platforms
The Doctor	< 2 years of relevant work experience	
	High <ul style="list-style-type: none">6 medical university programs in top 700 worldwide	Low <ul style="list-style-type: none">~10k medical doctor graduates annually
	2+ years of relevant work experience	
	High <ul style="list-style-type: none">Several renowned hospitals in the country (e.g., Dar Al Fouad, Saudi German hospital)	Low <ul style="list-style-type: none"><40% of the 215k registered medical doctors in the syndicate practicing in the country7 doctors per 10k people
The Educator	Low <ul style="list-style-type: none">Low ranking (130th in the world) for quality of education system	High <ul style="list-style-type: none">~7.5% of employed population working in the education sector

Figure 120 - Egypt supply-side areas of focus categorization

Backup: assessment of areas of focus against supply-side criteria, clusters ticking all three criteria are deemed "quick to market"

Clusters of focus	Labor qualifications	Labor availability	Supporting ecosystem
CRM services (incl. call centers etc.)	✓	✓	✓
Engineering design and consulting services	✓	✓	✓
Media services	✓	✓	✓
Marketing services	✓		✓
Software and apps dev., integration, implementation & management	✓	✓	✓
Finance and accounting services	✓	✓	✓

12.9 Morocco

12.9.1 VALUE PROPOSITION
The five key pillars for a successful talent pool ecosystem

for job outsourcing were assessed to identify Jordan’s value proposition and competitive advantages.

PILLARS	DIMENSIONS	KEY FINDINGS
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">Only 37% of the Moroccan population aged 18 to 22 choose to enroll in tertiary educationMorocco ranks 120th in quality of education system and 70th in quality of math and science education (2018 WEF Global Competitiveness Report)Country has few renowned higher-education institutions, except for the Université Mohammed V de Rabat, which ranks in the top 90 in the Arab region (QS World University Rankings)
	Language proficiency	<ul style="list-style-type: none">Morocco is a multilingual country as multiple languages are spoken and written:<ul style="list-style-type: none">~98% of Moroccans speak Arabic; ~63% speak French; and ~10% speak SpanishHowever, English, a language used by numerous outsourcing businesses, is only spoken by 14% of the population
	Labor availability	<ul style="list-style-type: none">Morocco ranks 95th globally in the Global Talent Competitiveness Index (GTCI) 2021 and 96th in ease of finding skilled employees in the GTCI 2021National unemployment rate is estimated at ~11.2% in 2021 (% of total labor force)Percentage of unemployed university graduates is ~22%, a figure that has doubled in the last five years and is expected to increase to 50%, due to skill mismatch<ul style="list-style-type: none">University programs are mainly focused on technical skills rather than soft skills64% of the population lives in urban areas with access to proper telecom infrastructureFor unemployment to decline, Morocco will need to create 115,000 additional jobs each year, which can be tackled through outsourcing
	Labor cost	<ul style="list-style-type: none">Morocco’s workforce is slightly cost competitive compared to American and European countries<ul style="list-style-type: none">Engineer’s average annual salary is \$22k, compared to \$54k in Germany and \$16k in PolandAverage salary for call center agent in Morocco is ~\$16k per year, versus \$43k-\$48k in the USHowever, Moroccan labor force is expensive compared to peers in the region<ul style="list-style-type: none">Average salary for call center agent in Morocco is ~\$16k per year, versus ~\$4k in Egypt

PILLARS	DIMENSIONS	KEY FINDINGS
Market environment	Political stability	<ul style="list-style-type: none"> Morocco’s political risk score is medium (evaluated at 2.3 – where scores > 3.2 are deemed high) Morocco ranks 85th in the world in political stability (2021 Global Talent Competitiveness Index) Morocco is deemed politically stable by multiple Western governments (e.g., UK Government)
	Economic stability	<ul style="list-style-type: none"> Morocco’s economic risk score is medium (evaluated at 2.3 – where scores > 3.2 are deemed high) Morocco ranks 97th in 2022 Index of Economic Freedom and 5th among MENA countries Morocco’s real GDP reached 139.5B \$ in 2021 (growth rebounded to 7.4% in 2021 after contracting by 6.3% in 2020) and inflation rates reached 7.2% in 2022 Over past few years, Morocco has attempted to reform its economy and strengthen resilience to external shocks by restoring macro-economic balance and cutting subsidies
	Proximity to well-known demand hot spots	<ul style="list-style-type: none"> Morocco is strategically located close to well-known regional and global demand hot spots: <ul style="list-style-type: none"> 0-1-hour time difference with major European counties (e.g., UK, France) 2-hour time difference with Saudi Arabia and Qatar 3-hour time difference with United Arab Emirates (UAE) Global companies, especially European and East Asian, can benefit from a time zone advantage given the geographical, central location of the country
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none"> Morocco’s history and strategic location have turned the country into a blend of cultures <ul style="list-style-type: none"> Arab, Berber, European, and African influences are all part of the country’s unique heritage Language is also a cultural differentiator <ul style="list-style-type: none"> Many Moroccans can speak Arabic, French, Spanish, and English, widely used languages bridging the cultural gap between Morocco and the other countries



PILLARS	DIMENSIONS	KEY FINDINGS
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> Internet penetration reached 84% in 2020 versus global of 63% Morocco’s median download speeds of fixed connections reached 13.5 Mbps in 2022 (47.7% increase from 2021) Operators have upgraded their fiber optic network coverage and international connectivity Morocco is one of the most mature telecommunications markets in Africa offering some of the lowest prices for broadband internet access in the region
	Digital maturity levels	<ul style="list-style-type: none"> Morocco ranks high in 2020 GovTech Maturity Index and 60th in 2022 Digital Connectivity Index Morocco’s digital transformation efforts began more than a decade ago <ul style="list-style-type: none"> Government has launched several strategies to accelerate digital transformation (e.g., e-Morocco 2010, Digital Morocco 2013, Digital Morocco 2020)
	Physical infrastructure readiness	<ul style="list-style-type: none"> Country has achieved impressive progress in its infrastructure development <ul style="list-style-type: none"> 99.6% of Moroccan households had access to electricity and 80% of the population has access to safely managed drinking water services Morocco ranks 41st out of 141 countries in quality of road infrastructure (2019 WEF Global Competitiveness Report) Morocco has invested in urban public transport to meet demand of growing urban population
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Morocco offers abundant A-class office space, available in both the capital and urban cities, offering prime infrastructure, connectivity, and a vibrant business environment Co-working spaces with proper infrastructure (internet, electricity, etc.) are offered for freelancers and entrepreneurs, such as Techverse, Sundesk, Bridges to the Future, and Dar Digital Nomad

PILLARS	DIMENSIONS	KEY FINDINGS
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> A series of financial and non-financial incentives for investment projects are offered to businesses and include: <ul style="list-style-type: none"> Tailor-made offers for investors Financial incentives to cover recruitment and training cost End-to-end support from Moroccan Investment & Export Development Agency (AMDIE) Corporate income tax rate is fixed at 31%, the highest in the region
	Special economic zones' availability	<ul style="list-style-type: none"> The establishment of 5 dedicated outsourcing business parks, which operate under offshore status, has been key to the success of the outsourcing sector in Morocco <ul style="list-style-type: none"> Companies are provided with a range of incentives, including an exemption of income and corporate taxes for the first five years of operations, discounted rates for the following 20 years and simplified customs procedures
	Data and IP protection laws	<ul style="list-style-type: none"> Morocco has a law to govern privacy and data protection (Law No 09-08, established in 2009) Country has a relatively complete regulatory and legislative system for the protection of IP <ul style="list-style-type: none"> It is a member of the World Intellectual Property Organization (WIPO) and is a party to several international conventions and agreements (e.g., Paris convention for industrial property, and Madrid, Nice, Hague agreements for the protection of intellectual property) While Moroccan laws are generally adequate, enforcement is sometimes lacking
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Government is actively involved in enabling easy setup of outsourcing businesses <ul style="list-style-type: none"> For example, on top of the dedicated outsourcing business parks, government has several free trade agreements with countries such as the US granting businesses access to more than 50 countries and 1.3B customers There are no specific regulations that exist to govern job matching platforms in the country

PILLARS	DIMENSIONS	KEY FINDINGS
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> The government's overarching digitalization strategy is helping to secure specialization into demanded skills such as data analytics, cloud computing and software development: <ul style="list-style-type: none"> Digital Development Agency (ADD), which was created to execute Morocco's digitalization strategy, is very active in launching projects with different organizations to train talent In 2019, the National frame of certification (CNC) was launched by the Ministry of National Education, Vocational Training, Higher Education and Scientific Research to enable continuity and progression of talents throughout their personal and professional lives
	Private sector efforts	<ul style="list-style-type: none"> Morocco ranks 46th in prevalence of training in firms in 2021 Global Talent Competitiveness Index Morocco's private sector, although fragmented, has been instrumental in developing several initiatives when it comes to digital skills Around 20 initiatives, led by 14 private-sector institutions, were launched to train talent on digital topics <ul style="list-style-type: none"> The ICT Federation, which also acted as a stakeholder for the preparation of Morocco's digitalization strategies and visions, launched 6 projects on digital skills development
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Morocco is home to several non-profits that launched multiple initiatives to train talent across multiple areas related to future of work, including digital and technology: <ul style="list-style-type: none"> Since September 2020, Amideast has been working with the government of Morocco's Rhamna province to expand economic opportunity for the province's youth, developing its entrepreneurial potential, and promoting local culture Other organizations include The World Bank, ILO, UNICEF, Fondation Zakoura, and Phosboucraa Foundation

Figure 121 - Not-for-profit training programs in Morocco

Deep dive: several training programs launched by non-profits to skill, re-skill and upskill talent in the country

Non-exhaustive				
				
Objective	Organize academy on youth entrepreneurship and employability to enhance skills and job opportunities for young people in Morocco	Gain the necessary skills to improve ability to access employment and other economic opportunities	Provide training in life skills, financial skills, and entrepreneurship	Deliver professionalgrade football training and orientation free of charge to aspiring Moroccan youth
Program design	Capacity-building workshop supported by a comprehensive training of trainers program	Skills for Success® training program in Laayoune and Dakhla and surrounding cities	YouthInvest program sponsored by the MasterCard Foundation Four different training programs as part of the overall program	"Moroccan Voices", a camp aiming to support youth who are fond of football
Target audience	Young Moroccans	Unemployed youth and people with disabilities	Moroccan youth	Underprivileged and socially challenged youth
Impact	80 trainers from Morocco trained	900 participants	1,480 participants in one year in "100 Hours to Success" program	45-50 players and 5-10 coaches in each camp
Key offering components	Training on key entrepreneurship and financial education tools as well as green jobs and women entrepreneurship	Five fundamental components: English language skills, transition to work, professional skills, pay-it-forward, and IT skills	Skills and employability training On-the-job experience Access to finance to launch business	Football training Valuable peace-building skills
Length	One week	220 hours over 4 months	100 hours for "100 Hours to Success" program	2 camps, 4 days each
Delivery model	Physical workshop	Physical training sessions	Physical training sessions	Physical training sessions

12.9.2 REMOTE WORK TALENT PERSONAS
Twelve different remote work talent personas suitable for

outsourcing were identified and analyzed to assess talent qualification and abundance in Morocco.

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Operator	Medium	Very High
	<ul style="list-style-type: none">Medium ranking (88th out of 141 countries) on digital skillsBilingual labor	<ul style="list-style-type: none">~15.2% of total workforce with high school and above level of education
The Finance & Accounting Specialist	Low	Medium
	<ul style="list-style-type: none">No Moroccan finance & accounting university programs on list of top programs worldwide	<ul style="list-style-type: none">~4k accredited accountants in the country~3k business graduates annually
The Functional Tech Guru	< 2 years of relevant work experience	
	Low	Medium
	<ul style="list-style-type: none">No Moroccan software / computer university programs on list of top programs worldwide	<ul style="list-style-type: none">33 training fields in software design and computer modeling~3k computer and software engineering graduates annually
	2+ years of relevant work experience	
	Medium	High
	<ul style="list-style-type: none">Fifth-largest developer community in Africa with a solid local talent base	<ul style="list-style-type: none">~50k software developers in the country
The Specialized Tech Guru	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No Moroccan computer science university programs on list of top programs worldwide	<ul style="list-style-type: none">Limited number of university programs (<10) focused on data science and AI/machine learning in computer science
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No notable / global players operating in the AI / machine learning field	<ul style="list-style-type: none">Low supply of data scientists and AI and machine learning specialists due to the country’s underdeveloped AI ecosystem
The Legal Specialist	< 2 years of relevant work experience	
	Low	Medium
	<ul style="list-style-type: none">No Moroccan law university programs on list of top programs worldwide	<ul style="list-style-type: none">~15k+ graduates in legal sciences annually
	2+ years of relevant work experience	
	Medium	Medium
	<ul style="list-style-type: none">Established ecosystem with many local law firms operating in field	<ul style="list-style-type: none">~14k registered lawyers practicing law in the country

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Business Strategist	High	Medium
	<ul style="list-style-type: none">Global consulting firms established in the country (e.g., BCG, McKinsey, Roland Berger)	<ul style="list-style-type: none">Abundancy of management consultants working in global consulting firms with office in Morocco (e.g., BCG, McKinsey, Roland Berger), as well as fresh graduates from universities that, if properly trained, can fit role
The Design Engineer	Low	Medium
	<ul style="list-style-type: none">No Moroccan civil engineering university programs on list of top programs worldwide	<ul style="list-style-type: none">~10k engineering graduates annually35% of the engineers in the industries related to the Industrial Acceleration Plan (PAI) trained in outsourcing, and CAD design
The Audiovisual Maker	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No Moroccan media university programs on list of top programs worldwide	<ul style="list-style-type: none"><500 audiovisual, media, and tv/ film graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No notable media outlets with regional outreach operating in the country	<ul style="list-style-type: none">~3.3k employees working in the audiovisual sector in the country
The Marketing Guru	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No Moroccan marketing university programs on list of top programs worldwide	<ul style="list-style-type: none"><500 marketing graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No notable / global players operating in the marketing field	<ul style="list-style-type: none">Existing marketing ecosystem with ~20 firms (mostly SMEs with 10 to 50 employees each)
The Graphic Designer	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No Moroccan marketing university programs on list of top programs worldwide	<ul style="list-style-type: none"><500 marketing graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No renowned hospitals with regional outreach in the country	<ul style="list-style-type: none">Small pool of graphic designers in marketing agencies and freelancers on job matching platforms

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Doctor	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No Moroccan medical university programs on list of top programs worldwide	<ul style="list-style-type: none">~3k medical doctors graduates annually, making it difficult to rapidly train doctors to fulfill demand
	2+ years of relevant work experience	
The Educator	Low	Low
	<ul style="list-style-type: none">No renowned hospitals with regional out-reach in the country	<ul style="list-style-type: none">~23k doctors practicing in the countryOne of the lowest ratios of doctors to residents in North Africa (7.2 doctors per 10k residents)
	Low	High
	<ul style="list-style-type: none">Low ranking (120th in the world) for quality of education system	<ul style="list-style-type: none">~360k teachers in primary, secondary and tertiary education in the country

12.9.3 RECOMMENDATIONS

Clusters and areas of focus were categorized into quick to market and require enabling.

Figure 122 - Morocco supply-side areas of focus categorization

Backup: assessment of areas of focus against supply-side criteria, clusters ticking all three criteria are deemed "quick to market"

Clusters of focus	Labor qualifications	Labor availability	Supporting ecosystem
CRM services (incl. call centers etc.)	✓	✓	✓
Human resource management	✓	✓	✓
Software and apps dev., integration, implementation & management	✓	✓	✓
Business consulting and market research	✓	✓	✓
Legal services		✓	✓

12.10 Tunisia

12.10.1 VALUE PROPOSITION

The five key pillars for a successful talent pool ecosystem for job outsourcing were assessed to identify Jordan’s value proposition and competitive advantages.

PILLARS	DIMENSIONS	KEY FINDINGS
Labor availability and qualifications	Labor qualifications	<ul style="list-style-type: none">35% of population has university degrees with current participation of 33% in higher educationTunisia ranks 103rd in quality of education, and 44th for quality of Math and Science EducationThe country’s universities offer 200 courses in ICT fieldsTunisian universities aren’t very well-renowned (not ranked among top 50 in Arab region)
	Language proficiency	<ul style="list-style-type: none">Tunisians have high written and verbal proficiency in Arabic (literacy rate of ~79%)Tunisia provides a strong pool of bi-lingual labor where English is taught to all school students28% of the population is fluent in French
	Labor availability	<ul style="list-style-type: none">Tunisia ranks 81st place globally (9th position among its Arab peers) in the INSEAD Global Talent Competitiveness Index (GTCI) 2021 and ranks 72nd out of 134 countries in ease of finding skilled employees in the 2021 GTCIThe country has a workforce of 4.2M with unemployment reaching 16.1% in 2021 and ~60k graduates joining labor force annually~70% of Tunisians live in urban areas with access to decent telecomSkilled labor is readily available<ul style="list-style-type: none">High unemployment among higher education graduates (30.1%)~35% of graduates are from ICT, Engineering and Computer Science related fields
	Labor cost	<ul style="list-style-type: none">Tunisia’s skilled workforce is cost competitive compared to other popular outsourcing hubs<ul style="list-style-type: none">Average annual salary for a computer engineering graduate is \$13k which provides cost savings of up to 50% when compared to those in Bulgaria, Romania, Poland and GermanyRanks high in financial attractiveness of outsourcing in 2016 Global Services Location Index

PILLARS	DIMENSIONS	KEY FINDINGS
Market environment	Political stability	<ul style="list-style-type: none"> Tunisia’s political risk score is high and evaluated at 3.3 (where scores > 3.2 are deemed high) Tunisia ranks 110th in political stability (2021 Global Talent Competitiveness Index)
	Economic stability	<ul style="list-style-type: none"> Tunisia’s risk score is high and evaluated at 3.5 (where scores > 3.2 are deemed high) Tunisia ranks 128th in 2022 Index of Economic Freedom² and 10th among MENA countries The country’s GDP reached ~\$47B in 2021 and is growing at 3.3% annually following a 9.2% contraction in 2020 (largest drop among MENA countries) due to the pandemic The country’s economic outlook is highly uncertain where it is suffering from rising inflation (8.16%), elevated fiscal deficits and financing needs given the rising public debt (~80% of GDP)
	Proximity to well-known demand hot spots	<ul style="list-style-type: none"> Morocco is strategically located close to well-known regional and Tunisia is strategically located close to well-known regional and global demand hot spots: <ul style="list-style-type: none"> No time difference with many European countries such as Spain and the UK 1–2-hour time difference with GCC, MENA and European countries such as Saudi Arabia, Egypt, Germany and France Global companies, especially in Europe & MENA, can benefit from a time zone advantage given the geographical, central location of the country
	Cultural similarity with well-known demand hot spots	<ul style="list-style-type: none"> Language is a key cultural differentiator for Tunisia connecting it to GCC and European countries <ul style="list-style-type: none"> Tunisia’s official language is Arabic. In addition, many qualified labors speak English or French (or both) Large number of expatriates residing in other Arab, European and American countries, and helping to bridge the cultural gap between Tunisia and such countries

PILLARS	DIMENSIONS	KEY FINDINGS
Infrastructure	Telecom infrastructure readiness	<ul style="list-style-type: none"> Internet penetration in Tunisia reached ~67% (8M internet users) versus global penetration of 63% Tunisia’s median mobile internet speed reached ~25 Mbps (20% growth from 2021) and median fixed internet speed reached 7.84 Mbps (17% growth from 2021) Tunisia is home to one of North Africa’s most developed telecom infrastructures 4G internet coverage is widely available with plans for 5G to be introduced in 2023 Strong fiber optic coverage: Tunisian telecom providers manage 3+ sub-sea fiber-optic cables
	Digital maturity levels	<ul style="list-style-type: none"> Tunisia ranks high in the GovTech Maturity Index (GTMI), and 5th in Africa and 10th among MENA countries in Network Readiness Index rankings for 2020 The government is investing ~\$500M to introduce a 5-year digital transformation program “ Digital Tunisia 2020” to develop the ICT sector and improve internet connectivity across the country to reach an additional 3000 families
	Physical infrastructure readiness	<ul style="list-style-type: none"> 100% of the population has access to electricity and 94% of the population has access to water; however, the country is currently suffering from a water crisis due to due to poor infrastructure, scarce water resources and climate change Tunisia ranks 96th in quality of road infrastructure, and the country’s public transit sector is facing several challenges in terms of accessibility, capacity and quality of service
	Access to working stations equipped for remote work	<ul style="list-style-type: none"> Tunisia offers abundant A-class office space, available in both the capital and urban cities, offering prime infrastructure, connectivity, and a vibrant business environment Co-working spaces with proper infrastructure (internet, electricity, etc.) are offered for freelancers, such as Cogite, Coworky, Work Zone, and Regus

PILLARS	DIMENSIONS	KEY FINDINGS
Regulatory landscape	Tax exemptions and incentives for businesses	<ul style="list-style-type: none"> Government introduced new Investment Law in 2017 offering investors several financial & non-financial incentives <ul style="list-style-type: none"> E.g., freedom of foreign equity participation and lower tax rate (10%) for outsourcing companies, investment grants, freedom of transfer of funds abroad, freedom of transfer of funds and freedom of access to land ownership Corporate incomes taxes decreased to 15% in 2021 from 25% in 2020, relatively low compared to peers (e.g., Egypt, Lebanon)
	Special economic zones' availability	<ul style="list-style-type: none"> Tunisia has a 2 free-trade zones in strategic positions across the country offering benefits such as subsidies and tax exemptions, and a 3rd zone is currently under development The country also has 3 specialized Technoparks and 18 regional cyberparks hosting hundreds of ICT and BPO companies
	Data and IP protection laws	<ul style="list-style-type: none"> Data protection laws are in place where Article 24 of the new Tunisian Constitution of 2014 protects individuals from the inviolability of their personal information and data Tunisia is also a member of the World Intellectual Property Organization (WIPO), is a signatory to the Patent Cooperation Treaty and has a specialized agency responsible for the regulation of trademarks and patents (National Institute for Standardization and Intellectual Property)
	Regulations governing job outsourcing	<ul style="list-style-type: none"> Government is actively involved in enabling easy setup of outsourcing businesses <ul style="list-style-type: none"> For example, several laws such as the New Investment Law, and initiatives such as the specialized Technoparks and the “Digital Tunisia 2020” focus on enhancing the business climate for ITO & BPO companies There are no specific regulations that exist to govern job matching platforms in the country

PILLARS	DIMENSIONS	KEY FINDINGS
Talent skilling, upskilling and re-skilling landscape	Governmental efforts	<ul style="list-style-type: none"> Tunisian government introduced A TVET reform strategy in 2012 and has since established 150+ TVET centers to address the problem of skills mismatch and train unemployed youth <ul style="list-style-type: none"> As of 2016, ~70k students were enrolled in TVET training programs The TVET programs receive support from international organizations such as U.S. Agency for International Development and Microsoft Government also established a National Employment Fund to provide training programs and apprenticeships for disadvantaged Tunisians through the Ministry of Vocational Training helping them find productive long-term employment - served 400k+ job seekers from 2011 to 2014
	Private sector efforts	<ul style="list-style-type: none"> Many private sector companies do not offer enough formal training within their firms <ul style="list-style-type: none"> Tunisia ranks 89th in prevalence of training in firms (2021 GTCI) Tunisia has a strong support network of private online training centers and EdTech startups providing training on professional, technical and digital skills <ul style="list-style-type: none"> E.g., Softiti, Blackbird, Invesis, and Gomycode
	Not-for-profit institutions' efforts	<ul style="list-style-type: none"> Tunisia is home to several non-profits that launched multiple initiatives to skill, re-skill and upskill talent across multiple areas related to future of work, including digital and technology Examples of non-profits include: MDG Fund, Spark, Education for Employment, Amideast, and UNHCR

Figure 123 - Not-for-profit training programs in Tunisia

Deep dive: several training programs launched by non-profits to skill, re-skill and upskill talent in the country

	MDG  MDG ACHIEVEMENT FUND	efe  التعليم والتدريب للتوظيف	spark 	 ENAEZ Tunisia
Objective	<ul style="list-style-type: none"> Promote innovative entrepreneurship and job creation schemes to decrease youth unemployment 	<ul style="list-style-type: none"> Address the high unemployment rates among Tunisian youth and provide training on skills needed in the workplace 	<ul style="list-style-type: none"> Providing youth with skills needed to increase likelihood of finding sustainable jobs 	<ul style="list-style-type: none"> Support Tunisian develop their critical thinking, communication and leadership skills preparing them for the workplace
Program design	<ul style="list-style-type: none"> Support provided to university graduates and unskilled youth launch their own businesses 	<ul style="list-style-type: none"> Training and partnerships with companies to skill, reskill and upskill fresh graduates and provide job opportunities 	<ul style="list-style-type: none"> Training programs for job seeking youth, and coaching and access to finance for aspiring young entrepreneurs 	<ul style="list-style-type: none"> Entrepreneurship program supporting young students develop business skills through a business development competition
Target audience	<ul style="list-style-type: none"> Underserved groups such as unemployed youth 	<ul style="list-style-type: none"> Unemployed Tunisian youth 	<ul style="list-style-type: none"> Youth population 	<ul style="list-style-type: none"> High school students and vocational training learners
Impact	<ul style="list-style-type: none"> ~200 participants 	<ul style="list-style-type: none"> ~14k participants 	<ul style="list-style-type: none"> ~5k participants 	<ul style="list-style-type: none"> ~ 25 participants
Key offering components	<ul style="list-style-type: none"> Training programs and entrepreneurial competitions along with advising services for unemployed youth 	<ul style="list-style-type: none"> Market-driven courses to increase employability and trainings on entrepreneurship supporting aspiring youth 	<ul style="list-style-type: none"> Coaching, trainings on soft and technical skills, internship placements and supporting youth establish own businesses 	<ul style="list-style-type: none"> Trainings on developing a feasibility study, marketing and finance strategies for a mock business idea
Length	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> 24 hours over 16 sessions
Delivery model	<ul style="list-style-type: none"> Physical training sessions 	<ul style="list-style-type: none"> Physical and online training sessions 	<ul style="list-style-type: none"> Physical and online training sessions 	<ul style="list-style-type: none"> Physical workshops

12.10.2 REMOTE WORK TALENT PERSONAS
Twelve different remote work talent personas suitable for

outsourcing were identified and analyzed to assess talent qualification and abundance in Tunisia.

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Operator	Medium	High
	<ul style="list-style-type: none">Medium ranking (67th out 141 countries) on digital skillsBilingual labor	<ul style="list-style-type: none">~40% of population with high school and above level of education
The Finance & Accounting Specialist	Low	Medium
	<ul style="list-style-type: none">No Tunisian university programs on list of top finance and accounting programs worldwide	<ul style="list-style-type: none">~25k employees in financial & insurance activities~13k business graduates annually
The Functional Tech Guru	< 2 years of relevant work experience	
	Low	High
	<ul style="list-style-type: none">No Tunisian university programs on list of top computer engineering programs worldwide	<ul style="list-style-type: none">10k+ ICT and computer engineering graduates annually
	2+ years of relevant work experience	
	Medium	High
	<ul style="list-style-type: none">Some global players (e.g., Infor, Think-IT) operating in computer / software engineering field	<ul style="list-style-type: none">80k+ employees working in the country's large and fast-growing ICT sector~50k web, app, and software developers in the country
The Specialized Tech Guru	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No Tunisian computer science university programs on list of top programs worldwide	<ul style="list-style-type: none">~3k law graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No notable players operating in AI / machine learning field with few startups	<ul style="list-style-type: none">Low supply of experienced computer scientists, data scientists, AI, and Machine learning specialists

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Legal Specialist	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No Tunisian law university programs on list of top programs worldwide	<ul style="list-style-type: none">~3k law graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No notable global law firms with offices in the country	<ul style="list-style-type: none">~8k registered lawyers that are practicing and have obtained their licenses
The Business Strategist	Low	Medium
	<ul style="list-style-type: none">No notable consulting firms operating in the country (except for KPMG management consulting which serves local clients)	<ul style="list-style-type: none">Abundancy of fresh business and engineering graduates that, if properly trained, can fit the role
The Design Engineer	Medium	Medium
	<ul style="list-style-type: none">Few notable players with relatively strong local talent base operating in the country (e.g., TECI)	<ul style="list-style-type: none">10k+ engineering and architecture graduates annually~3k engineers leaving the country annually in search of better opportunities
The Audiovisual Maker	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No Tunisian media university programs on list of top programs worldwide	<ul style="list-style-type: none">~8k audiovisual, media, and tv/ film graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No media outlets with regional outreach operating in the country	<ul style="list-style-type: none">Steadily growing film industry with a few film production companies within the country (< 25)
The Marketing Guru	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No Tunisian marketing university programs on list of top programs worldwide	<ul style="list-style-type: none"><2k marketing graduates annually
	2+ years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none">No notable / global marketing agencies operating in the country	<ul style="list-style-type: none">Underdeveloped marketing ecosystem with a few small and mid-size agencies (< 50)

PILLARS	QUALIFICATIONS	ABUNDANCE
	ASSESSMENT	
The Graphic Designer	< 2 years of relevant work experience	
	Low	Low
	<ul style="list-style-type: none"> No Tunisian university programs on list of top art and design programs worldwide 	<ul style="list-style-type: none"> <1k graphic design graduates annually
	2+ years of relevant work experience	
The Doctor	Low	Low
	<ul style="list-style-type: none"> No notable / global players operating in the graphic design field 	<ul style="list-style-type: none"> Relatively small pool of graphic designers in marketing agencies and freelancers on job matching platforms
	< 2 years of relevant work experience	
	Low	Low
The Educator	<ul style="list-style-type: none"> No Tunisian medical university programs on list of top programs worldwide 	<ul style="list-style-type: none"> <1k medical doctor graduates annually
	2+ years of relevant work experience	
	High	Low
	<ul style="list-style-type: none"> Several renowned hospitals (6) ranking among top 1000 hospitals worldwide 	<ul style="list-style-type: none"> 13 physicians per 10k residents High emigration amongst doctors (1k+ in 2021)
The Educator	Low	High
	<ul style="list-style-type: none"> Low ranking (103rd in the world) for quality of education system 	<ul style="list-style-type: none"> 150k+ teachers across primary and secondary education

12.10.3 RECOMMENDATIONS

Clusters and areas of focus were categorized into quick to market and require enabling.

Figure 124 - Tunisia supply-side areas of focus categorization

Backup: assessment of areas of focus against supply-side criteria, clusters ticking all three criteria are deemed "quick to market"

Clusters of focus	Labor qualifications	Labor availability	Supporting ecosystem
CRM services (incl. call centers, etc.)	✓	✓	✓
Content and document processing	✓	✓	✓
Software and apps dev., integration, implementation & management		✓	✓
Engineering design and consulting services		✓	✓

12.11 Upskilling benchmarks and lessons learned

Upskilling is gaining traction as more weight is attributed to skills, with offering emerging almost everywhere to upskill workforce.

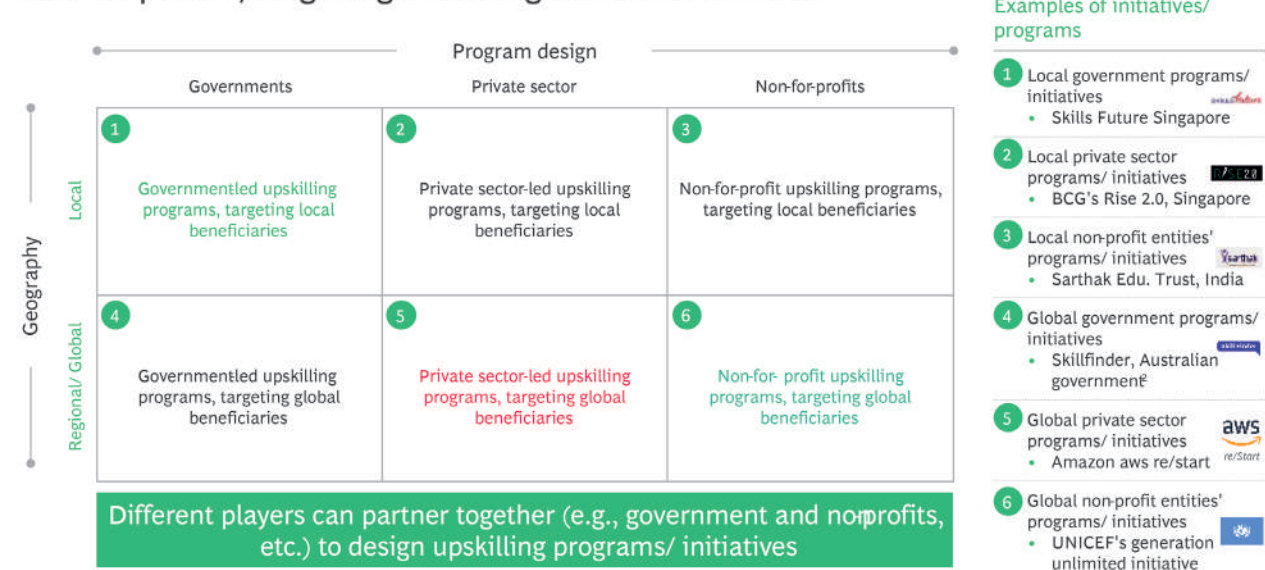
UPSKILLING	
Objective	Most countries today focus on upskilling talent – an area that is gaining traction globally, to equip workforce with 21st century competencies and increase the workforce competitive advantages on the local and global stage
Program design	Programs are typically designed by either: <ul style="list-style-type: none"> Governments and governmental entities Private sector Non-profit entities Partnerships amongst the above
Target audience	Programs can be both country specific or have regional/global reach, with some specific eligibility criteria when program target underserved target segments (e.g., women, refugees, immigrants)
Impact	Most programs aim to fulfill a gap in skills in the market and provide better opportunities for unemployed or under-employed candidates (mostly youth)
Key offering components	<ul style="list-style-type: none"> Influencing policy makers and gov’ts Designing trainings/bootcamps on both hard (e.g., coding, sales, etc.) and soft skills (e.g., critical thinking, comm’s, etc.) Providing non-formal career support (incl. career counseling and other support) Developing digital learning solutions
Length (Applies only to trainings)	Program length varies, but mostly short-stints of a few weeks or months to get the participants as quickly as possible into the job market
Delivery model (Applies only to trainings)	Program typically provide online classes or launch in-person classes in partnership with local implementation players

Different upskilling initiatives take place, designed by governments, private sector, or non-profits; targeting local

or global beneficiaries (see image below).

Figure 125 - Upskilling initiatives

Upskilling initiatives are designed by gov'ts, private sector, or non-for-profits; targeting local or global beneficiaries



- **Local government-led upskilling programs.** Targeting local workforce and designed to upskill in sectors of interest as part of future governmental plans, visions and aspirations
- **Local private sector- led upskilling programs.** Focusing on local beneficiaries; designed to upskill either employees within corporations or locals to prepare them for private sector roles
- **Local not-for-profit upskilling programs.** Focusing on beneficiaries in a select geography; programs can be targeting a wide range of beneficiaries (incl. youth, PoDs, etc.) and offering trainings in a wide array of fields
- **Global government-led upskilling programs.** Targeting global beneficiaries, typically designed by developed countries targeting beneficiaries in developing countries
- **Global private sector- led upskilling programs.** Focusing on global beneficiaries; typically designed by large international corporations to upskill beneficiaries and prepare them for private sector roles

- **Local not-for-profit upskilling programs.** Focusing on beneficiaries in geographies globally; programs can be targeting a wide range of beneficiaries (incl. Youth, PoDs, etc.) and offering training on a wide array of fields

Four types of offering when it comes to upskilling initiatives (see image below) were observed from case studies conducted by not-for-profit and/ or private sector entities, including: (1) Influencing policy makers, (2) Designing trainings and bootcamps, (3) Providing non-formal career

support, (4) Developing digital learning solutions

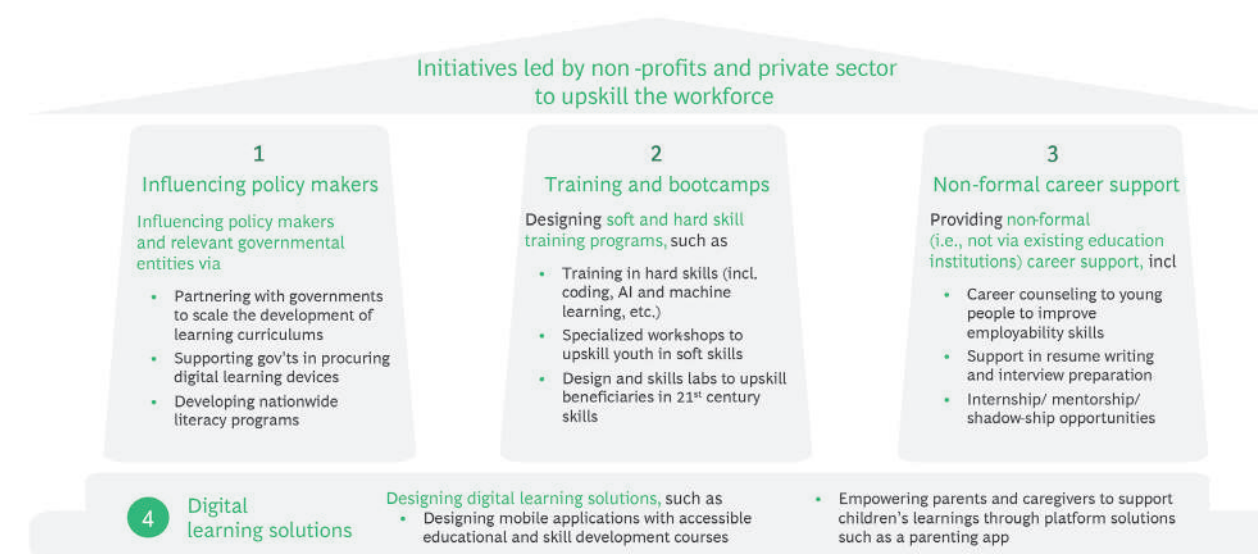
As part of this study, and in order to distill learnings on upskilling, four detailed case studies were conducted, including:

Case study 1:

- Context: UNICEF partnering with SAP to provide specialized skills training and quality education for youth in disadvantaged communities

Figure 126 - Types of upskilling initiatives

Four types of initiatives led by non-profits and private sector to upskill the workforce



- Problem statement:

1. At least 1 out of 5 young people today are not in employment, training, or education

2. Only 8% of young people in low-income countries will achieve minimum level of secondary skills

- Objective and geographic coverage: Global multi-sector partnership known as "Generation Unlimited" aiming to upskill and integrate young people (aged 10-24) in Europe, Asia and Africa into the workforce by 2030; initial efforts focused on India, Turkey and Vietnam

- Key offering components:

1. Using online learning tools in all languages to improve the digital skills of school students
2. Providing career counseling to young people to improve employability skills
3. Supporting the formal education system to provide young people with training in block-coding, app development and machine learning and AI
4. Establishing design and skills labs to develop 21st century skills in upper-secondary schools

5. Partnering with governments to scale the development of digital learning curriculums

Case study 2:

- Context: NGO Sarthak Educational Trust designing on-line courses to upskill and rehabilitate PwDs

- Problem statement:

1. PwDs in India have minimal livelihood options in public and private sectors

2. Many PwDs lack basic digital skills needed for employment

- Objective and geographic coverage: The India based NGO skills PwDs to find jobs based on their capabilities and is training 60,000 registered members to find jobs in public and private sector

- Key offering components:

1. Providing online courses and resources such as online/ audio books in hospitality, retail and IT sectors during the pandemic allowing 2,500 members to find jobs

- 2. Developing digital literacy programs to allow for the digital inclusion of people with disability
- 3. Upskilling PwDs on mainstreams digital tools and systems ranging from operating phones and computers, and making online payments

- 4. Designing a mobile application with accessible educational and skill development courses

Case study 3:

- Context: Microsoft partnering with 15 nonprofits in MEA countries to upskill 1.4M of the region’s youth in computer science

- Objective and geographic coverage:

1. Microsoft, in collaboration with non-profits, developed educational programs on computer science to train the region’s underserved youth on digital skills needed in the digital economy
2. The initiative covered 360 cities in 10 MEA countries including South Africa, Nigeria, Egypt, Senegal, Morocco, Tunisia and Saudi Arabia

- Key offering components:

1. Organizing 61,000 workshops and events across 30,000 schools, and upskilled over 13,000 instructors and teachers to provide training on digital literacy and CS for the youth
2. Providing basic digital literacy training at youth centers, IT clubs and schools in underprivileged communities
3. Supporting in obtaining financial grants
4. Supporting in trainings for thousands of trainers

Case study 4:

- Context: UNICEF partnering with private and public sector to make digital learning opportunities available for all young people in Europe and Central Asia

- Problem statement: Millions of children in Europe and Central Asia have limited access to effective digital learning. This has been exacerbated by COVID19 where 50M children were affected by school closures

- Objective and geographic coverage:

1. UNICEF partnered with private and public sector entities to address 4 critical needs for digital education: world-class digital learning solutions; connectivity; device and affordable content and data
2. Aim of the partnerships is to enhance provision of digital skills for youth, so they participate productively in the digital economy

- Key offering components:

1. Expanding equitable access to the internet and digital solutions especially for schools in marginalized areas (e.g., Identifying device needs, specifications and standards needed for digital learning and supporting governments with device procurement)
2. Empowering parents and caregivers to support children’s learnings through platform solutions such as a parenting app
3. Providing digital skills development courses for teachers
4. Developing a relevant and inclusive digitized curriculum to aid in digital learning

Four additional programs, offered by governments, private sector players and not-for-profits, were benchmarked.

PROGRAM	GENERATION	RISE 2.0	SKILLS FUTURE	UK DEPARTMENT FOR EDUCATION – SKILLS ACCELERATOR
Objective	Transform education to employment systems to prepare, place, and support people into life-changing careers that would otherwise be inaccessible	Enhance employability by building high-demand business and digital skills	Enable Singaporeans to learn for life, pursue skills mastery and develop fulfilling careers, for a future-ready Singapore	Build stronger partnerships between local employer groups to make sure communities are getting the training needed to meet local skills gaps
Program design	would otherwise be inaccessible	Rise 2.0 is a private sector program designed by BCG for Rapid & Immersive Skill Enhancement	Skills future is a national movement (under FEC1) to provide Singaporeans with the opportunities to develop their fullest potential	Skills accelerator is a public sector program designed by UK’s department for education
Target audience	Employed and unemployed adults who need to learn new skills for a better/change in career path with online and in-person trainings and job placement support	Singapore Citizens, Permanent Residents and Long-Term Pass Plus holders above 21 years of age (employed & unemployed)	Singaporeans at any stage in their life (schooling years, early career, mid-career or silver years)	Unemployed youth 16–25-year-old
Impact	~5,000+ graduates from 15+ countries per year; 3-4x increase in student income after the program	65%+ job placement in pilot phase; placement assistance with wide range of companies including in BCG network	540,000+ beneficiaries annually	66% of trainees were placed in apprenticeships or full-time roles (~40,000+ beneficiaries annually)
Key offering components	<ul style="list-style-type: none">• Technical skills courses designed to fill market need (e.g., customer service and sales, technology, health-care, skilled trades)• Behavioral & professional training (e.g., interview prep)	<ul style="list-style-type: none">• One of three specialized digital pathways – Business & Data Analytics, Digital Sales & Marketing or Digital Transformation• Placement support• Core business and digital foundational courses grounded in real life industry experience• Project-based teachings guided by industry practitioners	<ul style="list-style-type: none">• Programs tailored to the participant’s career stage incl. work-study programs, tech skills accelerator programs, leadership development, etc.	<ul style="list-style-type: none">• High impact training and short courses that are bespoke and responsive to employers’ needs to address skills gaps and shortages• Placement support (e.g., CV writing, job interview support)• English, math and basic digital skills (if needed)

PROGRAM	GENERATION	RISE 2.0	SKILLS FUTURE	UK DEPARTMENT FOR EDUCATION – SKILLS ACCELERATOR
Length	4 to 12 weeks	10 weeks (short intensive course) 16 to 18 weeks (flexible course)	1 to 3 years depending on the program	6 weeks to a year
Delivery model	In person and / or online classes delivered by local implementation partners trained and quality controlled by Generation	Project-based learning opportunities delivered by industry experts (e.g., developing a digital marketing strategy for new consumer product)	Delivered by partners incl. the Institutes of Higher Learning (IHLs), private providers and corporates	Partnership with employers, sector bodies and existing apprenticeship training agencies

12.12 Study limitations

The study’s limitations relate mainly to time flexibility and data availability.

- Time flexibility: This study was conducted within a constrained time-period. Had there been more time, further and more in-depth analyses could have been conducted for some aspects of the study – including for example a bottom-up analysis of workforce competencies in the focus countries, additional interviews with stakeholders from demand hot-spot markets, etc.
- Data availability: The study’s field is quite niche and unique, and though there have been several studies that tackle job outsourcing, none have attained the level of depth targeted in this study. Some of the data limitations include:

- Many interpretations of job outsourcing exist, and in the case of certain information and data sources, it is not specified to which outsourcing interpretation the data refers.
- The information required for this study is two-dimensional, by geography and by job cluster. However, for a few geographies, information on job outsourcing is not available broken down by job cluster. In most of these cases, there may only be a high-level breakdown of Business Process Outsourcing (BPO) vs. Information Process Outsourcing (IPO) vs. Knowledge Process Outsourcing (KPO).
- Many of the countries analyzed have been hit by economic and political crises in recent years, making a significant part of the published and publicly available data slightly outdated.

12.13 Source

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