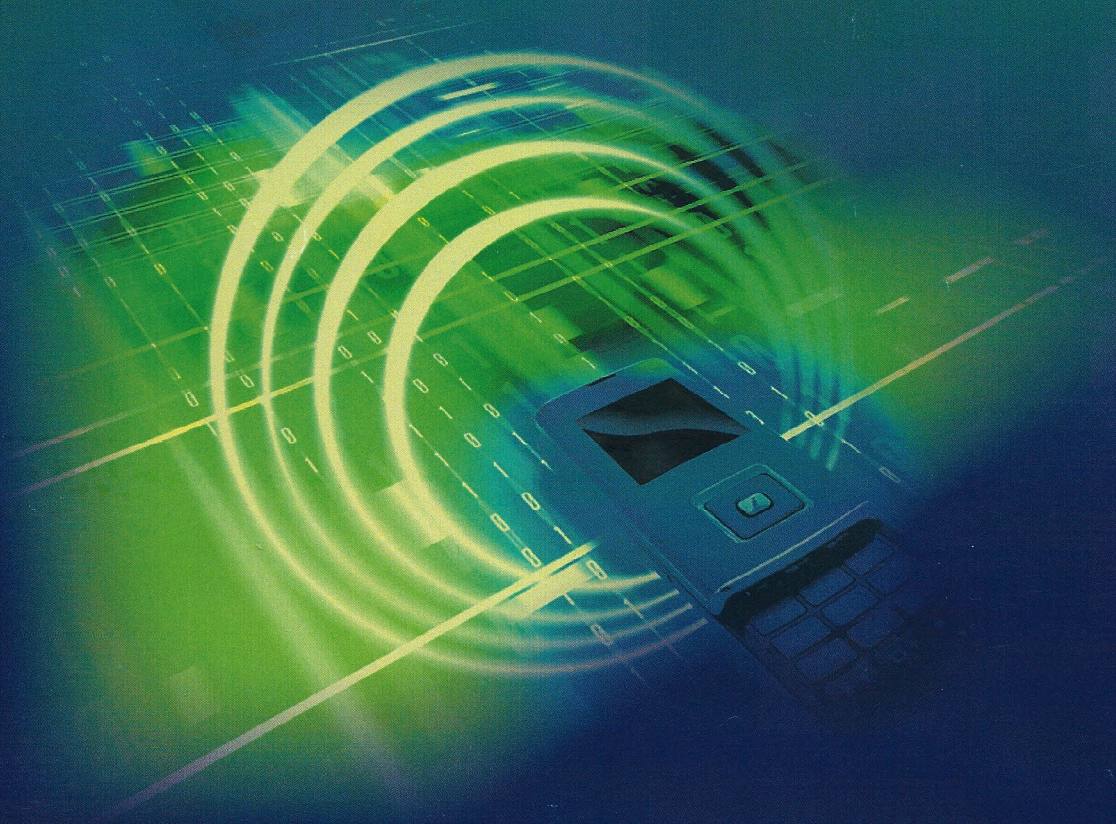


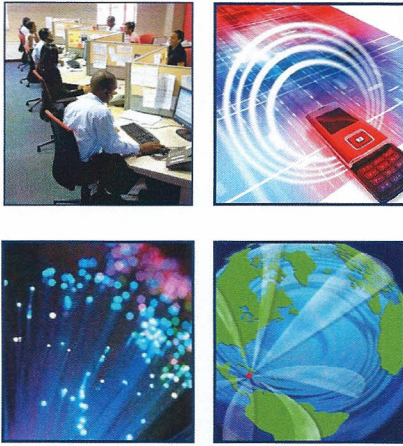
INVESTING IN JAMAICA's

ICT

INFORMATION &
COMMUNICATIONS
TECHNOLOGY

INDUSTRIES





Jamaica

Native English Speaking Talent,
Supported By Excellent Technology

Jamaica is the third largest island in the Caribbean with a population of 2.7 million and an English-speaking labour force of 1.3 million. Located in the Eastern Time Zone, it offers a strategic nearshore advantage to the US market by virtue of being only an hour away from Miami and approximately three hours from New York.

The capital city, Kingston, is the heart of the island's economic and financial activity and a cosmopolitan metropolis buzzing with commerce, fine dining and vibrant nightlife. Within the Kingston Metropolitan Region is the municipality of Portmore, which is an up-and-coming nerve centre housing the largest concentration of Jamaica's young middle-class. Over 400,000 Jamaicans call Portmore home, as well as several best-in-class multinational outsourcing operators.

Jamaica's other major city, Montego Bay, is a tourist mecca boasting lavish resorts, pristine beaches and championship golf courses. Beyond its image as a

tropical paradise, Montego Bay is currently the base of operations for the majority of Jamaica's Business Process Outsourcing (BPO) providers, who are clearly impressed by its unbeatable work-play proposition.

Today's Jamaica prides itself as being a highly competitive business destination and the leading contact centre location in the English-speaking Caribbean, with over 10,000 full-time agents in the offshore BPO sector. With an established track-record in finance and accounting, human resource outsourcing (HRO), receivables management, technical helpdesk support, outbound sales and lead generation, Jamaica has been recognised by Gartner as a destination to watch. Additionally, since 2000, notable Fortune 500 BPOs have established Centres of Excellence on the island.



Why Jamaica?

Third largest English-speaking population in the Caribbean; high labour force availability; average Call Centre and BPO salaries that are 40-60% lower than the US and government support for this priority sector, Jamaica provides great value to anyone looking for a BPO destination. These clear advantages presented by Jamaica have kept industry heavyweights ACS (Xerox), Teleperformance and West Corporation operating in the island for almost a decade.

TEN REASONS

1. Proximity to the World's Biggest Market for Outsourcing Services
2. Large, Educated English Speaking Workforce
3. Sophisticated Telecommunications Structure
4. Data Security and Intellectual Property Protection
5. Competitive Business Costs
6. Great Quality of Life
7. Established Track Record in IT & BPO
8. Stable Political and Business Climate
9. Strong Government Support
10. Dedicated and Productive Workforce with low attrition rates



REASONS TO SELECT JAMAICA FOR OUTSOURCING

1) Proximity to the world's biggest market for outsourcing services

Jamaica's proximity to the United States provides great opportunities to service the US market. Companies looking to provide outsourcing services to North American clients will find that a one-hour flight from Miami or three hours from New York is ideal. This reduces travel costs and makes for quick and efficient face-to-face meetings and facility visits.

This is especially important when embarking on a new BPO project, which may require teams moving between both locations to resolve unforeseen issues and concerns. This is further enhanced by Jamaica's shared time zone with the US, thus enabling convenience in effecting real-time solutions.

With three international airports and more than 25 scheduled airlines from North America and Europe,

travel to and from Jamaica is seamless. In addition to the air links, Jamaica's Kingston Harbour is the seventh largest natural harbour in the world and is one of the region's leading container transshipment ports. Intra-island travel is facilitated by several domestic carriers, charter bus services and the newly built Highway 2000 road network, which provides vital transport links between the major cities. This ensures flexibility in the choice of locations for any future expansion.

In summary, regardless of where you decide to do business on the island, moving your resources and property in, out and across the country is easy and free of hassle.



REASONS TO SELECT JAMAICA FOR OUTSOURCING

(2) Large Educated English-Speaking Workforce

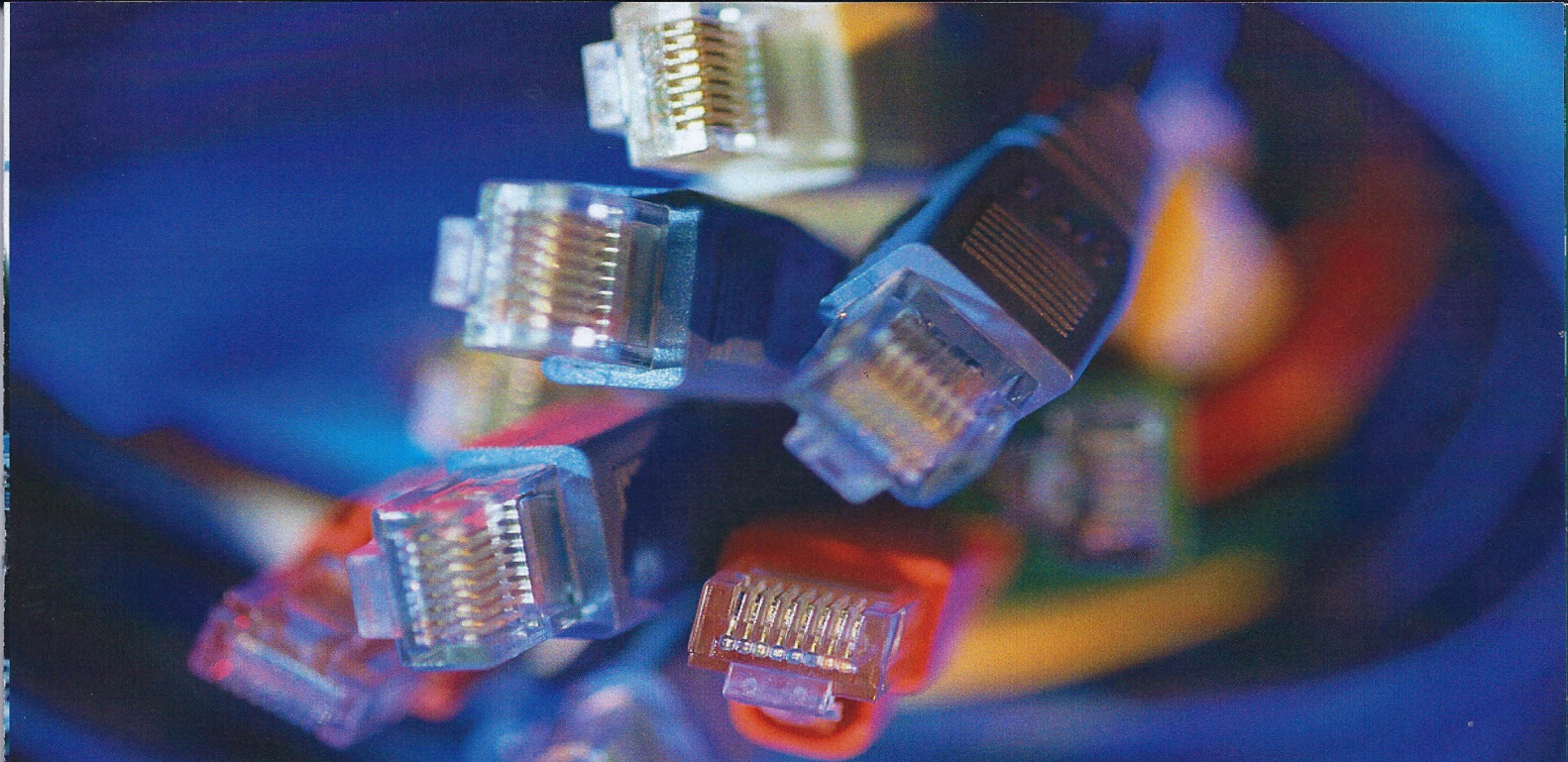
Jamaica's labour force of 1.3 million comprises 103,000 university graduates (8.3%), 400,000 secondary graduates (30.5%) and 61,000 persons enrolled in universities. With unemployment currently standing at 11.3% (an increase from 10.6% in 2009), labour is widely available.

Nineteen (19) universities and numerous online programmes prepare workers in the areas of Computer Sciences, Finance and Accounting, Management and the Social Sciences, with over 7,500 new professionals graduating from universities or technical schools each year. The typical BPO/ITO agent in Jamaica is a high-school graduate with some tertiary training. Over 20,000 persons graduate from high school annually.

In addition to the private institutions, HEART - the government-funded and operated training agency - currently has 28 institutions that are charged with providing employer-specific training. With improved focus now being placed on ICT, new training programmes have been developed using an internationally accredited curriculum that specifically supports the outsourcing industry.

Quick Facts

- Jamaica has dominated the Microsoft Imagine Cup competition for the Caribbean and Latin American and placed 3rd in the 2007 world finals in South Korea.
- 1,040 students graduated with IT degree and received training as a Computer Programmer and/or Technician in 2008
- Jamaica is the third largest English-speaking country in the Americas.



REASONS TO SELECT JAMAICA FOR OUTSOURCING

(3) Sophisticated Telecommunications Infrastructure

Jamaica's sophisticated and robust telecommunications infrastructure supports all the requirements for global connectivity and ranks among the most developed in the world. With three fibre routes off island, Jamaica provides BPO outsourcing operators with ample redundancy and unmatched uptime. Additionally, the impressive bandwidth capacity allows the telecom providers to offer a wide choice of circuits including T1, DS3 and OC3. Two additional telecoms players have licences to provide undersea broadband connection, which will further increase the overall capacity and redundancy on the island. This robust telecoms infrastructure provides opportunities for Jamaica as a major cloud computing and disaster recovery hub for companies worldwide.

On the wireless front, Jamaica has the highest teledensity rate in the entire region and rivals many developed nations in the world at over 109%. Three mobile providers offer the gamut of 3G, 4G, WiMax and international roaming capabilities.

Quick Facts

- Three fibre routes off island
- Highest teledensity rate in the region
- Three mobile providers offering 3G, 4G, Wimax and international roaming capabilities



REASONS TO SELECT JAMAICA FOR OUTSOURCING

(4) Data Security and Intellectual Property Protection

The Government of Jamaica's posture towards cybercrime, especially as it affects the burgeoning BPO industry, has been decisive and proactive. As a high-priority issue, a cross-ministerial multi-agency approach was adopted to eradicate crimes such as data and identity theft in the outsourcing sector. Through legislative action, policing methods and collaboration with ICT operators, Jamaica has successfully mitigated against these risks to the sector. Three examples of steps taken are noted below:

The Jamaican police in conjunction with the US Government have set up a special task force on cyber crime, which created a mobile unit to specifically deal with the issue of fraud and identity theft.

The Cyber Crimes Bill has been enacted into law in our Parliament. This enables the authorities to immediately prosecute persons who appear in breach of data security laws.

Jamaica is a member of the World Intellectual Property Organisation (WIPO).

(5) Competitive Business Costs

Jamaica climbed 11 places to rank 23rd overall in the world according to the A. T. Kearney Global Services Location Index (GSLI) 2009. Jamaica ranked 14th out of the 50 top countries surveyed, in the area of Financial Attractiveness.

Labour: Jamaican labour costs 40-60% less than North America and Europe. Costs are kept stable due to low wage inflation and currency depreciation against the dollar.

Taxes: Corporate taxes and duties are effectively zero for offshore companies based on Freezone incentives. Outsourcing operators in Jamaica pay 0% tax on profits in perpetuity and qualify for General Consumption Tax (Sales Tax/ Value Added Tax) exemption.



REASONS TO SELECT JAMAICA FOR OUTSOURCING

(6) Great Quality of Life

Jamaicans are friendly, charismatic and fun-loving people with a diversity of views, religions and ethnic backgrounds (African, Indian, Chinese and European). This is epitomized in our motto "Out of Many One People". Expatriates have regularly fallen in love with Jamaica and many have comfortably settled in the island and now call Jamaica home. The American International School of Kingston (AISK) provides US-based curricula to nearly 300 students annually from pre-school through to high school programmes, which makes the transition easy for expatriates with families.

Jamaica is a lush Caribbean island about the size of Connecticut, which enjoys a tropical climate with year-round temperatures of 80° - 90° Fahrenheit (27° - 32° Celsius). Famous for its pristine beaches, pulsating reggae music, record-breaking athletes and the world's best coffee, Jamaica offers a wonderful and interesting mix of culture, exciting talent and natural beauty.

Quick Facts

"Jamaica is the 3rd happiest place on the Planet"

Source: 2009 Happy Planet Index



REASONS TO SELECT JAMAICA FOR OUTSOURCING

(10) Dedicated and Productive Workforce with Low Attrition Rates

High attrition among skilled knowledge workers can negatively affect the quality of service delivered by a company. The average attrition rate in Jamaica's BPO sector stands at just 1.4%. Given that labour represents a high portion of total costs in BPO operations, typically 70%, Jamaica's low turnover and absenteeism rates translate into significant cost savings on recruitment and training.

Additionally, Jamaica's BPO employees tend to view their jobs as careers and not just transitional employment. Consequently, they are hardworking, loyal and highly productive.

"The dedication and work ethic of Jamaicans far surpasses that of workers in any other country"

Lyn Langford, VP- F&A/CEFS
LOB, Global Operations Support,
Affiliated Computer Services, Inc., (XEROX)
55,000 employees in nearly
100 countries.

ICT DEVELOPMENT OPPORTUNITIES

There are three land marked Free Zones in Jamaica; Montego Bay Freezone, Cazoumar freezone, and Portmore freezone. The Jamaican government is actively working to provide more space within the freezones for expansion of existing ICT players and for accommodating new entrants. The flexibility of Jamaica's Free Zone laws allows for Single Entity Free Zones which can be established anywhere outside of a designated free zone space. Additionally, there is now greater incentive for companies to invest in the redevelopment and renewal of urban areas with the passing of the Urban Renewal and Tax Relief Amendment Act. In this regard, there are prospects for development of Tech Parks by the private sector and plans are in train to develop three such parks across the island:

- **Naggo Head Tech Park, Portmore** - This Park located in the English-speaking Caribbean's largest middle-income dormitory community, has been home to BPO industry heavy-weights Affiliated Computer Services and (ACS) and West Corporation for more than 5 years. There are 21 acres earmarked by the government for the development of this technology park.
- **Caymanas ICT Park** - The planned Caymanas Economic Free Zone (CEFZ), will accommodate 1500 acres of prime real estate and be home to the next great economic space for Jamaican enterprise. Within this CEFZ, the government has designated 40 acres for development of an ICT technology park by the private sector.
- **Barnett Tech Park, Montego Bay** - This Private Sector ICT Freezone, will occupy approximately 100 acres located in the Fairfield area of Montego Bay owned by Barnett Limited. Blue Chip IT Company Vista Print has already started construction of its Caribbean Headquarters on 11 acres at the site. There are further lots available for development.



OUTSOURCING COMPANIES IN JAMAICA



ACS, A XEROX Company
M12-18 Southern Cross Blvd
Montego Bay Freeport
T: 876-684-9123

ACS e-services
1 Mangrove Way,
Montego Bay Free Zone,
Lot 9G-9L Naggo Head
Portmore, St. Catherine, Jamaica
T: 876- 684-9468

Accent
Kingston
T: 876-764-0001

ADS Global
Montego Bay
T: 888-560-5413

Alliance One/Teleperformance
1 Mangrove Way,
Montego Bay
T: 876-684-9170

Assets Investigative Services
Blue Diamond Centre,
Ironshore, Montego Bay
T: 876 792-2711

Customer Service Associates
Barbican Road,
Kingston 8
T: 876-357-1712

Fullgram Solutions
12-14 Oxford Terrace,
Kingston 5
T: 876-620-4960

Global Gateway Solutions
1 Mangrove Way,
Montego Bay Freezone
T: 877-477-4627 ext 1001

Indusa Global
Data Entry Building,
1 Mangrove Way,
Montego Bay Freezone
T: 876-684-9463

Innovative Outsourcing
Shop 20, Pines Plaza,
Junction, St. Elizabeth
T: 876-965-8779

Island Calling Limited
3rd Floor, UGI Building,
30-34 Market Street, Montego Bay
T: 402-968-68101-solutions

Contact Centre
JM Building,
24 Trafalgar Road
Kingston 5
T: 954-232-3653

IT Centre
17 Holborn Road,
Kingston 5
T: 876-620-4040

Lindsay International
Marketing Services
Ward Avenue,
Mandeville, Manchester
T: 876-384-8639

Market Track
Data Entry Building # 3,
Montego Bay Free Zone
T: 876-953-6000

NARS
1-3 Pimento Way
Cazoumar Free Zone, Montego Bay
T: 876-979-8779

Olympic Sports
1 Mangrove Way,
Montego Bay Freezone
T: 876-953-6182

Paragon Communications Ltd.
1 Mangrove Way,
Montego Bay Freezone
T: 416-646-2811 extn: 227

Professional Axxess
1 Mangrove Way,
Montego Bay Freezone
T: 876-684-9536

Professional Marketing & Associates
Church Street, Montego Bay
876-286-3366

Real Decoy
Kingston
T: 613-234-9330 ext 118

Shore Business Services
7 Barbados Avenue, Kingston 5
T: 876-620 6697/6332

Strobe Communications
2nd Floor, 33 St. James Street,
Montego Bay
T: 876-630-0004

SynchroSource Offshore Solutions
Suite 2A, 3-5 Fort Street,
Montego Bay
T: 1-876- 579-5899

Unique Vacations
1 Mangrove Way,
Montego Bay Freezone
T: 876-684-9708

Vistaprint
1 Mangrove Way,
Montego Bay Freezone
T: 876-684-9137

West Corporation
Portmore Informatics Park,
St. Catherine
1.800.242.3230 ext. 5019

West Indies Call Centre
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Montego Bay Freezone

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FACILITATING INVESTMENT IN JAMAICA

Jamaica is the place to do business on a global scale, and JAMPRO – the national investment and export promotion agency – is the gateway that connects the world to Jamaica. In extending Jamaica's image beyond that of a tourist destination, the agency works closely with entrepreneurs from around the globe to enable them to tap into the wealth of investment and trade opportunities available in the country.

Operating under the direction of the Ministry of Industry, Investment and Commerce (MIIC), JAMPRO promotes investments in a number of targeted sectors, which include the creative industries (film, music and entertainment), manufacturing, tourism, agri-business, information and communication technology, mining and professional services. In facilitating both local and foreign direct investment, JAMPRO guides investors through the necessary processes to ensure expedient and successful start-up. The agency also offers development support services after an investment project becomes operational. This serves to encourage continued growth and maximise the contribution of the investment to the national economy.

In order to ensure the smooth implementation of investment projects, JAMPRO offers a suite of services in partnership with key government agencies and ministries. These services include securing work permits, non-tourist visas, duty waiver concessions, incentives, appropriate permits/licences, customs clearances, fiscal incentives, and building and development approvals. In this regard, JAMPRO collaborates with the National Environment and Planning Agency (NEPA), Jamaica Customs Department, the ministries of Industry, Investment & Commerce, Finance, Labour and Tourism, and the various Parish Councils. The aforementioned entities are guided by the mandate to simplify and harmonise the processes, procedures and documentation related to getting an investment off the ground.

The agency's cadre of knowledgeable and professional business facilitators stands at the ready to assist all potential investors, who can also access pertinent information on Jamaica and investment prospects through JAMPRO's web site at www.tradeandinvest.org. As part of its ongoing efforts to appropriately use technology to efficiently accommodate the information needs of potential investors, the agency launched the web-based JAMPRO Interactive Investment Map. This resource provides a pictorial view and related data on key infrastructure and institutions, investment projects, lands for development, film locations, natural resources and other related information that will assist them in making investment decisions. The Investment Map, which runs on the Google Maps platform, can be accessed from the home page of JAMPRO's web site or directly at http://projects.monagis.com/jampro_test.

JAMPRO remains committed to improving promoting, stimulating and facilitating the development of industry and trade, improving the nation's business climate, fostering economic relationships with key players in international markets and deepening the absorptive capacity of the economy.