

## **TERMS OF REFERENCE**

### **CONSULTANCY TO DEVELOP PROMOTIONAL BROCHURES FROM THE DIGITAL GLOBAL SERVICES STRATEGY**

*Jamaica (JA-L1079) -*

#### **1. Background and Justification**

##### **The Programme:**

- I.1 **The Government of Jamaica has requested of the IDB the operation “Skills Development for Global Services” (JA-L1079).** The total amount of this loan is US\$15 million. The programme will support the Government of Jamaica (GoJ) to develop its Global Services Sector or GSS.
- I.2 **Objectives.** The main objective of the loan is to promote the growth of the Global Services Sector (GSS) in Jamaica particularly in higher value-added segments. Specifically, it intends to: (i) provide the sector with better skilled workers; and (ii) increase Jamaica’s institutional capacity to attract Foreign Direct Investment (FDI) and increase exports. This operation proposes the following components:
  - I.2.1 **Component 1. Skills Development for the Global Services Sector and Strengthening of the Skills Development System.** This component seeks to align and improve the skills development system to provide the GSS with workers, particularly in higher value-added segments. First, it will finance activities to improve the system’s ability to guarantee relevance of training to increase the share of activities that are higher up the value chain from 60% BPO to 40% KPO, by 2020. Second, it will finance activities to improve the quality of training.
  - I.2.2 **Component 2. Global Services Sector Ecosystem.** The objective of this component is to strengthen Jamaica’s capacity to attract investment and increase exports in higher value-added and digital segments. First, the component will optimize investment promotion processes as well as the institutional, regulatory, and incentive framework that governs the GSS. Second, it will support the development of a strengthened value proposition for GSS firms (foreign and domestic) seeking to invest or reinvest in Jamaica. Third, it will increase JAMPRO’s capacity to support MSMEs in the GSS, including through the establishment of an incubator and accelerator programme. Lastly, it will create a digital management system - building on existing one-stop shop platforms- to consolidate trade and business information and strengthen decision-making based on data analytics. A preliminary activity will undertake a data collection exercise, preparing a baseline of firms that will benefit from this operation.
- I.3 **Execution.** JAMPRO is the executing agency of the loan under preparation (JA-L1079). The sequence of the activities to be financed will be established by JAMPRO, which will communicate this to the Bank in the context of permanent dialogue for project preparation. The activities to be carried out will be consultancy services.

- I.4 **Strengthened value proposition for Global Services Sector.** The component will finance: (i) Digital Global Services Strategy - a gap analysis and an action plan for adapting to future demand for digital services in the GSS. (ii) Digital GSS Branding campaign. (iii) Digital GSS promotional activities and materials. (iv) Attendance at and hosting of international and regional investment targeting events. (v) National awareness campaign to increase the attractiveness of the sector to local investors, jobseekers, and the public.

**The Consultancy:**

- I.5 The global services sector has been identified as one of the key sectors for improving economic diversification in Jamaica as a major employment generator and exporter of services which can earn needed foreign exchange. Within this sector, Jamaica primarily operates in the provision of business processing outsourcing services, which generate approximately US\$700 million in revenues.
- I.6 In 2019, work commenced on the development of a strategy for Jamaica's digital services industry, an expanded approach to the previous 5 Year National Strategy for the Development of Jamaica's Outsourcing Industry (2015-2020). The new strategy, expected to be executed over 2021 to 2025 provides 17 recommendations, an action plan and industry segments for Jamaica to advance in the digital services sphere. These are all being done to reposition the country as a high value destination for investment, and provision of services that are globally competitive.
- I.7 The value proposition for Jamaica has been established on over a decade of success at the Business Process Outsourcing level (contact /customer service call centres). This industry leveraged our intrinsic advantages as a nearshore outsourcing destination (geographical proximity, cost arbitrage, time zone, language skills). From this value proposition, the strategy identifies eight niche segments in the subsectors of Business Process Outsourcing (BPO), Knowledge Process Outsourcing (KPO) and Information Technology Services (ITO) where Jamaica can advance to higher value services using horizontal and vertical integration approaches
- I.7.1.1 Horizontal movements in the outsourcing and IT services industry include the following (and the relevant segments are captured in the Table 1 overleaf:
1. BPO: (i) Omni Channel Customer Services
  2. KPO: (i) Market Research Services, (ii) Business Research/Financial Research Services, (iii) Content Management and Content Strategy, (iv) Content Creation, (v) Content Distribution and
  3. ITO (i) Mobile and Web Development Services, (ii) Digital Commerce
  4. Additionally, *vertical integration* can see Jamaica leveraging experience in delivering contact centre services through (i) tourism services as well as the expertise in (ii) digital government solutions.

Table 1: Segments within the Four Industries

Assessment Factors										
	BPO		KPO							
	Omni Channel UX	Social Media Support	Market Research	Business Research	Content Management	R&D Services	Legal	Investment Research	Data Analytics	Vertical Specific Solutions
<b>Current Maturity</b>	Medium	Medium	Medium	Low	Medium	Low	Low	Low	Low	Low
Domestic Factors										
<b>Ability to leverage existing subsegment strengths</b>	High	High	High	Medium	Medium	Low	Low	Low	Low	Medium
<b>Existing trainable talent pool (short term)</b>	High	High	High	High	High	Low	Medium	Low	Medium	Medium
<b>Domestic capacity to scale the resources for providing the services (long term)</b>	High	High	High	High	High	Low	Medium	Low	Low	Medium
<b>Potential to leverage existing capacity development programs</b>	High	High	High	High	High	Low	Low	Medium	Medium	Medium
<b>Contribution towards domestic revenue /employment targets</b>	High	High	High	High	High	Low	Low	Low	Low	Medium
<b>Ability to provide increasingly complex services within the subsegment (long term)</b>	High	High	High	High	High	Low	Medium	Medium	Medium	Medium
<b>Capacity to be offered as a standalone service</b>	Low	Low	High	High	High	Low	High	High	High	High
<b>Relevance to existing global service providers (to be offered from Jamaica)</b>	High	High	High	High	High	Low	Medium	Medium	Medium	Medium
External Factors										
<b>Global demand for the services</b>	High	High	High	High	High	High	High	High	High	High

<b>Ability to compete cost effectively at a global level</b>	High	High	Medium	Medium	High	Low	Low	Low	Low	Medium
<b>Competition within the subsegment i.e., competing locations</b>	High	High	High	Medium	Medium	Low	Medium	High	Medium	Low
<b>Service relevance i.e., relevance of the service over the long term to be developed as a niche segment</b>	Medium	Medium	High	High	High	High	High	High	High	High
<b>Future Growth Potential</b>	High	Medium	High	High	High	Low	Medium	Medium	Medium	Medium

1.8. JAMPRO now wishes to implement the Global Digital Services Strategy in a bid to move Jamaica from BPO and KPO to higher value digital services, and to break into the broader market of IT services or IT enabled services, valued at US\$1 trillion globally.

1.9. Digital services which support a wide cross section of economic activities presents an opportunity for Jamaica to introduce innovative opportunities with the potential to create jobs, grow exports and attract investments. With the onset of the Covid-19 pandemic the case for economic diversification became even more pronounced as traditional service industries like tourism suffered and others in goods production were struck with lockdown orders. Despite these activities, most digital services were able to readjust and continue delivering and growing throughout 2020 into 2021. To avoid significant long-term effects to the Jamaican economy, developing new and resilient industries will reduce the risk to shocks.

1.9.1 Packaging and promoting the opportunities in the niche segments identified through the strategy, is a key recommendation for the positioning of digital services domestically. The opportunity brochures should be used to inform prospective investors, active firms, and job seekers on the future of the industry and the opportunities that exist in these higher valued services.

## 2. Objectives

The main objective of this consultancy is to:

Develop a collection of four (4) investment brochures showcasing the viable opportunities in the three (3) broader industries and an emerging fourth, accordingly:

1. Business Process Outsourcing (BPO)
2. Knowledge Process Outsourcing (KPO)
3. Information Technology Outsourcing (ITO)

#### 4. Vertical Integration

The above encompass a number of segments highlighted in the Global Digital Services Strategy for investment promotion.<sup>1</sup>

**The expected output is:** Investment brochures that can be used to promote digital services locally and abroad. Each brochure will provide information on the niche areas, the global trends and outlook for the investment and employment opportunities in the respective segments

- Online/physical trade/investment fairs/conferences promoting the respective niche.
- Each brochure ideally should be no more than 15 pages, including illustrations and attendant appendices.
- Brochures should be presented in high resolution, digital format that can be downloaded via a link, and which will also facilitate high-quality printing

### 3. Scope of Services

#### 3.3.1. Workplan

- Identification of business opportunities in Jamaica’s Global Digital Services (GDS) for the Development of Brochures on Each Viable Opportunity for Investment:
- Template for the brochures

#### 3.3.2. Development of Draft Promotional Content for the Brochures: each to indicate:

- Global market trends in the industry
- Global market size /value of trade for the opportunities in the segments identified
- Regions and countries where the respective industries thrive
- Specific opportunities for investment
- Prerequisites for conducting business in the sector/ segments competitively (including but not limited to financial outlay; physical and digital infrastructure; professional /skills training)
- Appendix 1: Trade/Investment Fairs/Conference (online and/physical)
- Appendix 2: Provide a list of companies for investment targeting

3.3.3. Final high-resolution professionally designed brochures; including relevant images, charts, and illustrations: **fully edited with approved designs, and incorporating all feedback from review team**

### 4. Key Activities and Required Location

Activity	Location
– Inception meeting with JAMPRO and project team	Virtual
– Workplan and Inception Report: verifying/identifying the specific, viable GDS opportunities for packaging	

<sup>1</sup> The Strategy will be shared with the chosen consultant for perusal and reference for the Inception Report.

– Templates for brochures	
– Market information to promote each opportunity laid out in the agreed digital brochure format	Online
– Final brochures (investment packages) as per specifications outlined in Scope of Work	Online

## 5. Expected Outcome and Deliverables

- The expected outcome of this consultancy is a collection of brochures highlighting investment opportunities for developing Jamaica’s digital services
- Specifically, the deliverables are as follows:

DELIVERABLES	DEADLINE	REVIEW PERIOD
<b>DELIVERABLE 1:</b> – Detailed Inception Report and Workplan including Template for brochures	Week 1	2 days
<b>DELIVERABLE 2: Promotional Content:</b> - Latest global trends and best practices in the key areas identified for packaging (BPO; KPO; ITO and Vertical)	Week 4	1 week
<b>DELIVERABLE 3:</b> Four (4) Fully illustrated, Draft Brochures in digital format - according to the segments below with specific opportunities to be pursued in each: – BPO Segment – KPO Segment – ITO Segment – Vertical Segment	Week 10	1 week
<b>DELIVERABLE 4:</b> Final Digital Brochures which allow printable format – All comments from review addressed	Week 12	1 weeks

## 6. Project Schedule and Milestones

Assuming a project contract date of February 2022, the project is expected to be conducted over a period of 3 months, the following project schedule and milestones will apply after the Inception Meeting:

No.	Product	Estimated Delivery
1	Detailed Workplan with Template	February 2022
2	Inception Report	February 2022
3	DRAFT BPO; KPO; ITO, and Vertical Opportunity Brochures in digital format	April 2022
5	Final Digital Services Opportunity Brochures (in high resolution digital format as well as print layout format with relevant printing markers).	April 2022

## 7. Acceptance Criteria

All deliverables should be submitted electronically and in an editable format. They should include a

contents page, executive summary, main content, and annexes. Files in pdf format only will not be accepted.

## **8. Qualifications and Experience**

The consultancy is for a firm

### **Firm Qualifications**

- At least 5 years in Marketing, Communications, Business Development, Social Entrepreneurship, Information Technology Development/Management
- Experience in Publishing would be an asset

### **The key expert should meet the following criteria:**

- At minimum a postgraduate degree in one or combined/related areas of the following disciplines:
  - Communications
  - Public Relations
  - Marketing
  - Economics
  - Management
  - Information /Technology Management
- At least 5 years proven track record in developing marketing and promotional materials, specifically:
  - Demonstrable expertise in developing content for niche target audience
  - Demonstrable expertise in business/industry sector analysis and diagnosis – including the digital sector
- Strong project management skills
- Excellent written and oral communication skills, including familiarity with modern reporting /planning techniques (e.g., infographics; dashboards)
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### **Non-Key expert, Graphic Artist**

- At least a diploma or similar qualifications in graphic design and publications development
- At least 5 years working in the field of graphic production/publishing
- Proven/demonstrable experience working with digital tools for developing aesthetically pleasing publications (online and printed)

## **9. Supervision and Reporting**

The coordination and supervision of this consultancy will be undertaken by JAMPRO. Throughout the project, the consultant will report on, and submit deliverables to the Manager, Research & Business Opportunities, or designated officer. Any limitations encountered during the project should be submitted by email.

JAMPRO will assist in facilitating collaboration with any internal/external stakeholders for gathering

requisite information for the exercise

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Final acceptance of the output from the project rests with the President of JAMPRO.

#### **10. Schedule of Payments**

- Payment terms will be based on the acceptance of project deliverables.

<b>No.</b>	<b>Product</b>	<b>Scheduled Payment</b>
<b>1</b>	Inception Report & Work Plan: Specific Opportunities Identified for packaging with Template for Brochures Workplan	<b>5%</b>
<b>2</b>	Draft Promotional Content	<b>20%</b>
<b>3</b>	DRAFT BPO; KPO; ITO, and Vertical Services Brochures – fully designed with illustrations/pictures in digital format in agreed template	<b>50%</b>
<b>4</b>	FINAL Brochures incorporating feedback from reviews and fully edited (in high resolution digital format that will also allow high-quality print)	<b>25%</b>

**END**