

## How Outsourcing Can Help Mobilize Talents Globally: Egypt's Success Story

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Egypt's strategy is based on the development of outsourcing capability with the objective of competing efficiently worldwide and maximizing the revenues generated by the investments in this industry.

—*Dr. Tarek Kamel, Minister of Communications and Information Technology, Egypt*

Under the current wave of globalization, a variety of new forms of international trade has emerged, accompanied by profound changes in the ways in which talents can be mobilized and combined across national borders. Outsourcing has become one major component of this new landscape, and Egypt one of its champions.

The outsourcing market continues to grow. With some estimates placing the value of the total worldwide outsourcing market, including information technology outsourcing (ITO) and business process outsourcing (BPO), at almost US\$300 billion at the end of 2007—an increase of about 19 percent over the previous year—service providers and their enterprise customers are seeking new regions where low-cost, high-quality work can be done.

From the point of view of emerging economies, outsourcing represents an innovative way of benefitting from globalization while offering international businesses new ways of mobilizing talents worldwide, and at the best price. Over the last 20 years or so, countries such as India, China, and other Asian economies have significantly benefited from the outsourcing wave. Progressively, several middle-income countries in Europe (Hungary and Poland, for example), Latin America (Mexico and Brazil, for instance) and the Middle East (Egypt, the United Arab Emirates, and Jordan, in particular) also became outsourcing hubs.

The evidence shows that outsourcing has entered a new phase, whereby emerging countries are no longer just offering lower-cost labor to accomplish unsophisticated tasks (the “airline stubs” syndrome). Instead, through outsourcing, they can create jobs of growing quality and sophistication, with significant positive spillovers on their respective national processes of economic growth, technological development, and skills upgrading.

In this new context, the experience of Egypt is remarkable. Many observers see this 80 million person economy as the emerging gateway for outsourcing in the Middle East. This emergence, however, did not happen by chance.<sup>1</sup> The purpose of this chapter is to show

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how Egypt's success in the area of outsourcing has been the result of a carefully built strategy to create the proper environment for business and generate the required spirit of mutual trust and partnership.

### **Building a network of trust and partnership with global business**

Egypt's road to success in outsourcing started with a limited number of small steps. One pioneering experience was developed with IBM. The company started its presence in Egypt with a small application development center, which was an early precursor of outsourcing. It picked up momentum in the late 1990s, when the IT outsourcing pace began to speed up. The first project undertaken by IBM in Egypt was to "Arabize" some IT projects; this was followed by software development projects.

By the end of the 1980s, the Information Decision Support Centre (IDSC) of the Egyptian Cabinet was established with the aim of introducing information communication technologies (ICT) within the Egyptian government and leveraging it for the country's socio-economic development. Later on (by the end of the 1990s), President Mubarak announced the launching of a national program for ICT in Egypt along with the establishment of a new Ministry of Communications and Information Technology (MCIT) headed by Dr Ahmed Nazif, who later became Egypt's Prime Minister. In 2004, the Egyptian government, represented by the MCIT, realized the importance of establishing by law a specialized entity, the Information Technology Industry Development Agency (ITIDA),<sup>2</sup> which would shoulder the major role of developing Egypt's IT industry through the implementation of special programs tailored to attract foreign direct investment (FDI) to Egypt. The targets were private investors, private companies, and multinational corporations (MNCs), with a particular focus on BPO activities. This renewed focus on BPO, call centers, and technical support centers was very successful: from 2004 to 2008, the total volume of Egypt's offshore industry grew from US\$100–150 million to US\$700 million.

In recent years, seizing a larger share of the global outsourcing market has become a priority objective for the Egyptian government. Several key measures have been implemented to achieve this goal, with immediate results: in 2007, Egypt was ranked 13th as an outsourcing destination, according to the A.T. Kearney Global Services Location Index.<sup>3</sup> This puts Egypt ahead of delivery locations in Eastern Europe such as the Czech Republic, Hungary, and Poland, as well as other African locations such as South Africa and Tunisia.

### **A closer look at the ingredients of Egypt's current outsourcing strategy and initiatives**

A more detailed analysis of Egypt's strategy vis-à-vis the BPO market offers important lessons with regard to how a country can become a regional leader in outsourcing while maximizing the resulting benefits within its own national economy. Among the key components of this strategy, Egypt's national vision and framework and its national strategy deserve particular attention, as well as some of the key initiatives they allowed and supported.

#### **National vision and framework**

The Egyptian national vision is mainly focused on attracting more FDI, especially in BPO activities, in view of its positive spillover on employment rates. This is carried out through a comprehensive framework that aims to attract more MNCs that are interested in BPO, encouraging technology and know-how transfer and building qualified human capital that would meet international standards while being cost-competitive.

#### **National strategy**

The national strategy established for the development of the BPO market in Egypt is defined by the *ITIDA's strategy grid*, which includes the following pillars:

- Ensure that all requirements (human resources, infrastructure, legislative matters, etc.) are ready and available. This was a prerequisite for promoting Egypt as a BPO destination.
- Enhance the volume and quality of the local talent pool, particularly through the training of 4,500 university students (this is expected to scale up to 40,000 students within three years) with a view of enhancing their skills in order to make them able to contribute to the BPO segment.
- Promote Egypt as a BPO destination using the services of a world-class public relations company.
- Offer ready-made incentive packages tailored to suit all investors in accordance with the numbers of positions to be deployed in Egypt, training and telecommunications costs, and so on.
- Encourage local companies to cooperate with foreign investors.
- Provide single-window clearance, thanks to full cooperation from relevant governmental agencies and authorities.

## Key initiatives

Egypt has been undertaking many initiatives with the objective of creating an attractive and conducive business environment for multinational organizations. The government announced the development of a new delivery business hub, called *Maadi Investment Park*, which is specifically aimed at attracting BPO companies. This hub will be centrally located in Cairo and easily accessible by public transportation. Moreover, a UK-based company (SpinVox) has signed a deal to establish a business center in Alexandria, while several other leading MNCs are also actively considering Alexandria as a business hub.

MCIT also took a number of initiatives focusing on the development of the necessary high-quality human capital needed to drive forward the IT and BPO industries:

- **Talent building:** The National Telecom Institute (NTI), the Information Technology Institute (ITI), and the E-Learning Competence Center (e-LCC) are providing specialized ICT training programs. An internationally competitive IT industry requires a strong pool of local talents. Over the next four years, MCIT will focus on the enhancement of specialized technical skills as well as on programs that provide participants with additional soft and business skills. MCIT will also transform the basic ICT literacy programs into certification programs and will provide academic programs to develop managerial and business skills for practitioners in the ICT sector.
- **Developing research:** MCIT championed the establishment of the Nile University, a high-tech, nonprofit research and development institution specialized in engineering technology and business administration. The university's Executive Development Program, designed in collaboration with the Egyptian Foundation for Technology Education Development (EFTED), offers general management training courses for middle- to senior-level managers working in both private- and public-sector companies in the Middle East region.
- **Providing strategic training:** The Software Engineering Competence Center (SECC) is providing Capability Maturity Model (CMM) and Capability Maturity Model Integrated (CMMI) services to local software companies, offering technical and financial support to help them achieve level 2 and 3 CMMI accreditation. Project staff members provide consulting advice, training, pre-appraisal, and formal appraisal services. The project's goal is to train software engineers on software standards application as part of the system development

life cycle. It also aims at offering training on data collection and analysis, strategic planning, and business models. The SECC, in partnership with the Customer Operations Performance Center (COPC), is also involved in providing technical and financial support to Egypt's contact center industry to help it compete at the world level.

- **Developing basic BPO skills:** A pilot university project has been launched to train 5,000 students on basic BPO skills. This course is being offered to final year students in Cairo University, Ain Shams University, and Alexandria University. MCIT has roped in the leading BPO partners, such as IBM, Infosys, and Firstsource, to be the content developers and to train the trainers and delivery partners in this important talent-enablement program. The aspiration of MCIT is to scale this program to 20,000 students in the next two to three years and, in parallel, launch a finishing school program also scaling up to 20,000 students by 2011–12.
- **Adding partnerships:** One of the initiatives hosted by ITIDA is implemented by McKinsey & Company. Known as the *Talent Pool Initiative*, or "Edu-Egypt," its main goal is to enhance the supply of talent pool within universities and train 4,500 students in the next academic semester. It is expected to scale up to 40,000 students within the next three years. This will work for both the outsourcing and the captive industry in BPO service lines. This program is being designed and customized for Egypt by Indian BPO service providers (IBM Daksh, Infosys BPO, and Firstsource) and will cover English language and voice training (including grammar, accent, mother tongue influence neutralization, comprehension, and writing), soft skills and presentation skills, customer servicing, culture sensitivity, analytical and reasoning skills, and basic personal computer and data skills.

## Sources of Egypt's advantage and success in BPO

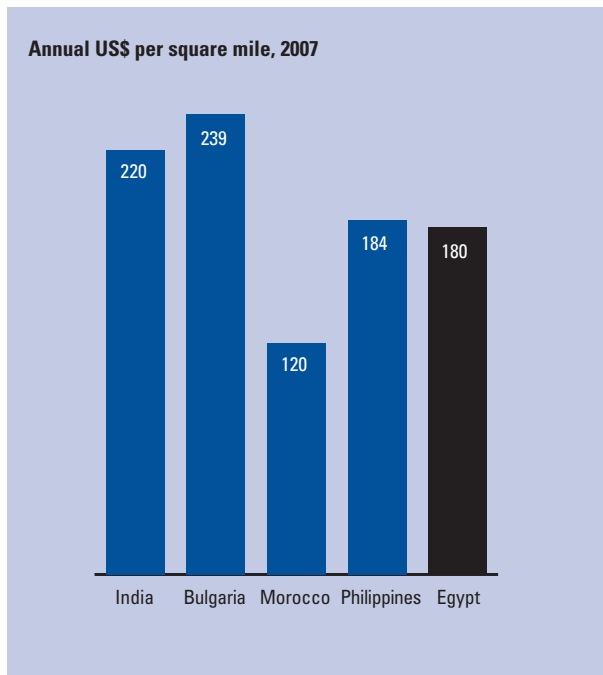
The following ingredients deserve particular attention in the context of Egypt's goal to be among the top five BPO destinations within the next 10 years: attractive costs, a competitive pool of human resources, a stable macroeconomic environment, strategic geographical locations, government support, telecommunications infrastructure, and an improved business environment.

### Attractive cost of operation

Egypt's cost competitiveness is not only sustainable but also expected to improve. This is primarily due to the low cost of human resources, telecommunications, and infrastructure (see Figure 1). It is possible to hire

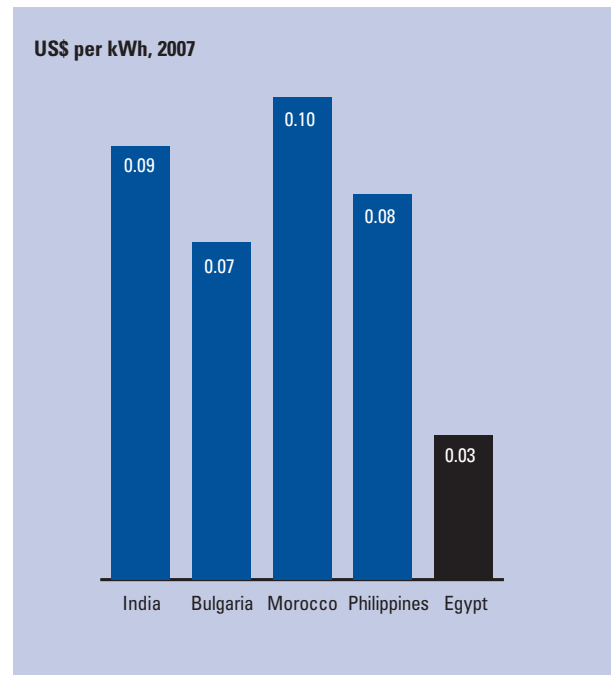
**Figure 1: Egypt's cost advantage in ICT**

1a: Real estate cost



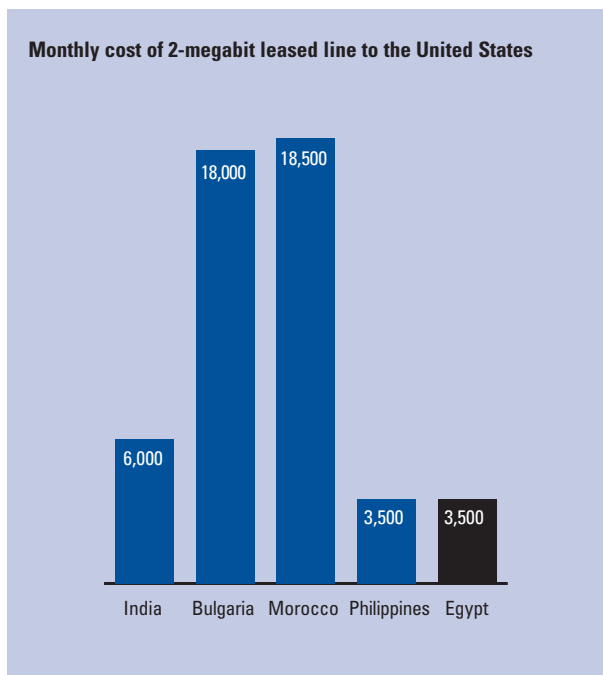
Source: McKinsey Global Institute, 2008b.

1b: Electricity cost (commercial)



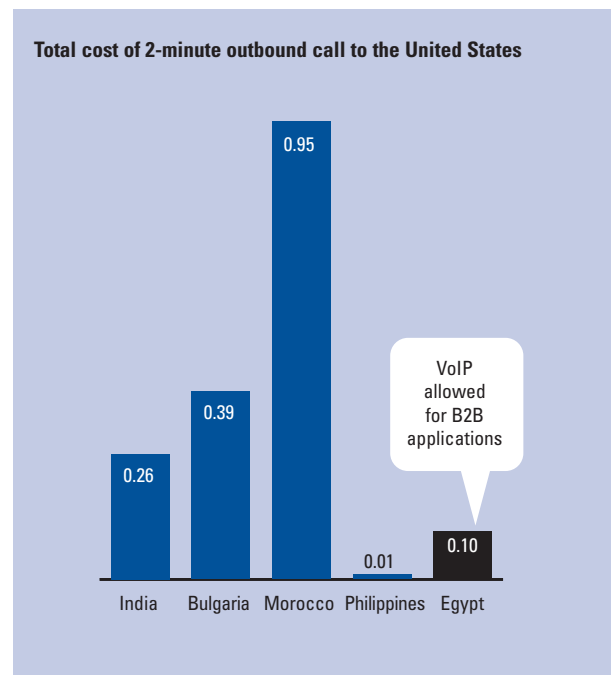
Source: McKinsey Global Institute, 2008b.

1c: Internet usage charges

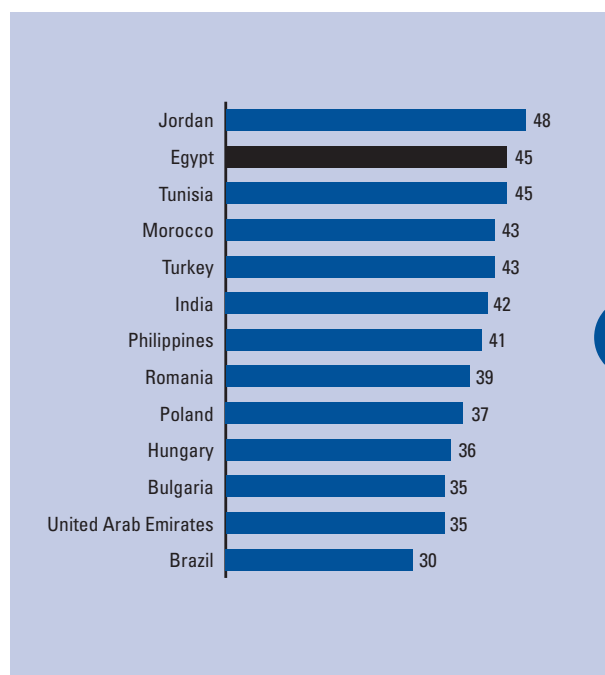


Source: McKinsey Global Institute, 2008b.

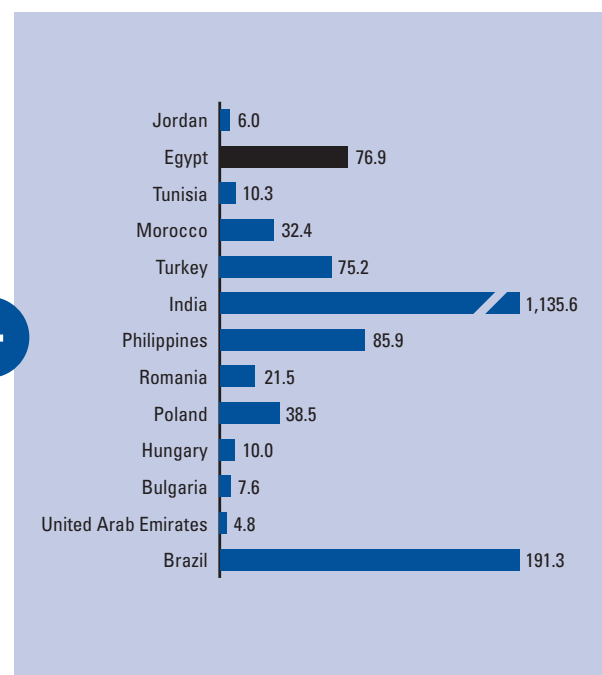
1d: Telecommunications cost



Source: McKinsey Global Institute, 2008b.

**Figure 2: Egypt's population****2a: Population 15–39 years old, percent (2007)**

Source: McKinsey Global Institute 2008b.

**2b: Population size, millions (2007)**

Source: UNFPA, 2007.

high-quality BPO agents in Cairo for US\$225 to US\$250 per month, whereas for other established and emerging countries—such as the Philippines and India—the figure is about twice as high. Real estate, electricity, and telecommunications costs are also competitive.

#### A strong focus on human resources

Egypt's large population (close to 80 million) is also young, with an average age of 24 (see Figure 2). This constitutes a strong advantage in a world in which talent needs to be built (or upgraded) at a rapid pace. Egypt is rich in talented, skilled workers who are eager to work and value multilingual abilities. Egypt has also been able to build on its familiarity with Western culture and its long-established international educational institutions (English, French, and German high schools and universities).<sup>4</sup>

Moreover, around 330,000 students graduate annually from universities in Egypt; hence the total number of multilingual and therefore suitable talent pool willing to work in the BPO industry in Cairo is estimated to be at least 24,000. Combined with its solid base of IT and technical skills, this provides Egypt with a strong critical mass of talents available to the global BPO industry (see Figure 3). Together with an advantageous geographical position (Egypt is at the crossroads of Europe, the Middle East, and Africa, and is in a favorable time zone for working with Europe-based companies), such elements have helped Egypt to make attractive value propositions to the global BPO industry.

#### Leveraging Egypt's stable macroeconomic environment

With an average growth rate of 7 to 8 percent a year, a fairly stable currency, and strong financial and credit markets, Egypt has been an attractive business and investment destination over the last decade. This has been reinforced by the government's policy of allocating a substantial portion of public investment to the development and improvement of infrastructure, especially telecommunications.

Figure 4 shows the evolution of total investment from 2003 to 2007.

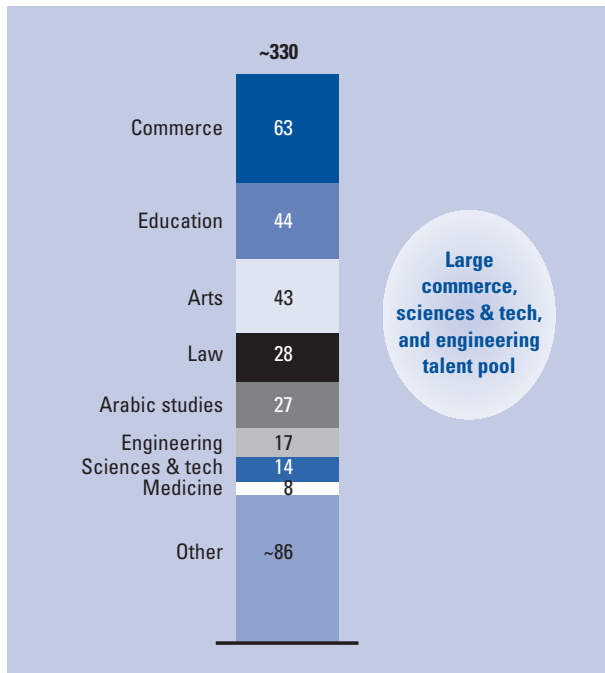
The Egyptian government has leveraged its advantages by offering incentive packages to both local and foreign investors. The government works in partnership with every investor to customize an incentive package that caters to the specific investor's needs. Such packages include tax exemptions and reductions for ICT industries, reduced land prices to investors in the ICT sector, and eased export and import regulations.

#### A special focus on offering world-class telecommunications infrastructure and services

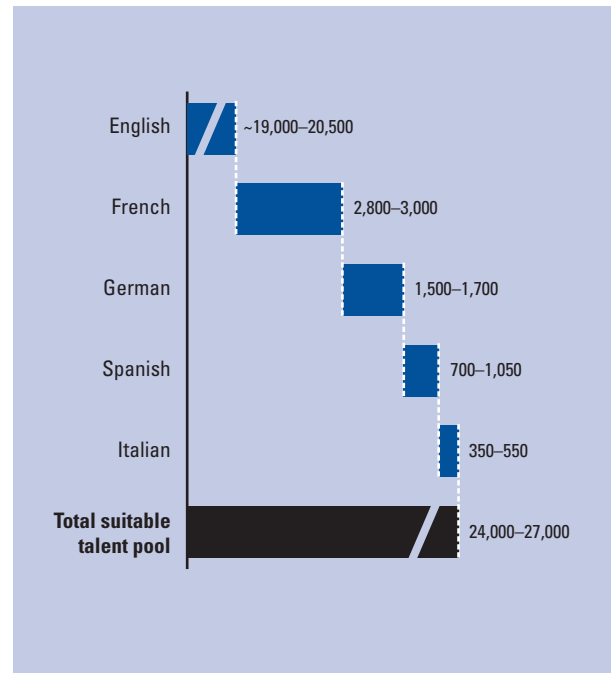
Efforts made by Egypt over the last decade have allowed significant improvements that have benefitted its BPO strategy. Currently, Egypt enjoys high-quality network facilities that are built around a world-class infrastructure, including 10 gb/s optical fiber and 2.5 gb/s rings, delivering services over a public switched telephone network (PSTN). Mobile and packet-based networks spread across the country. Internet and telephone penetration have increased significantly as a result (see Figures 5 and 6).

**Figure 3: Egypt's talent pool**

3a: Annual number of graduating students (thousands)



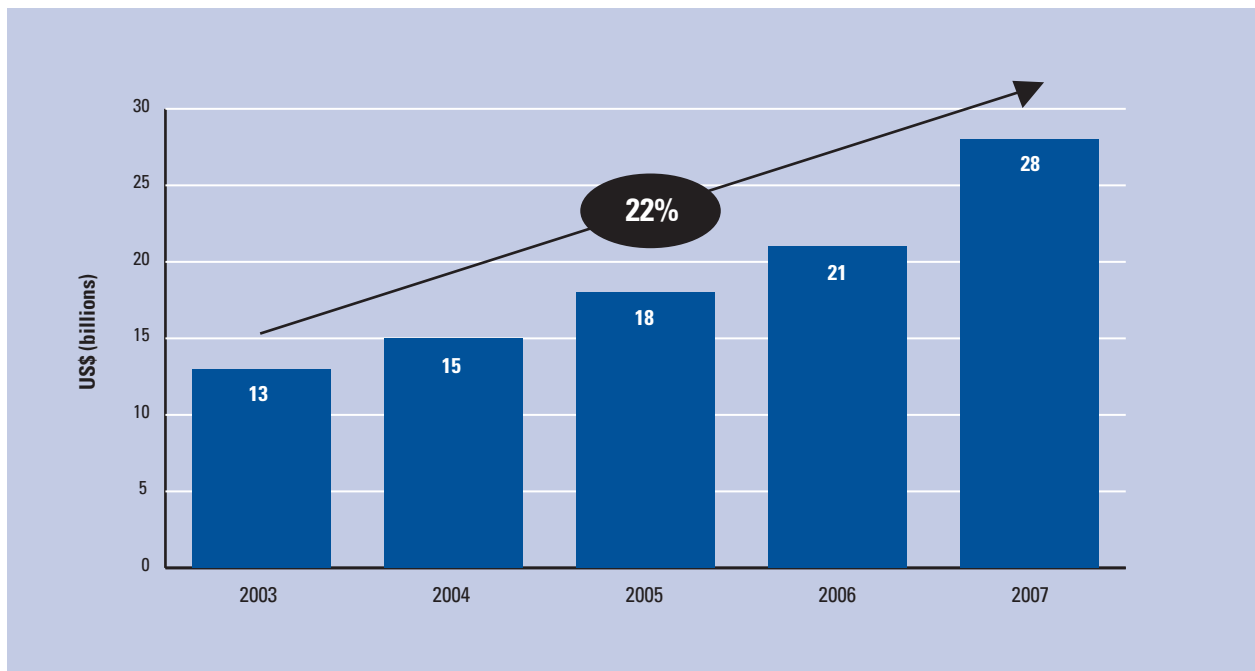
3b: Total suitable and willing talent pool (number of graduates)



Source: McKinsey Global Institute, 2008b.

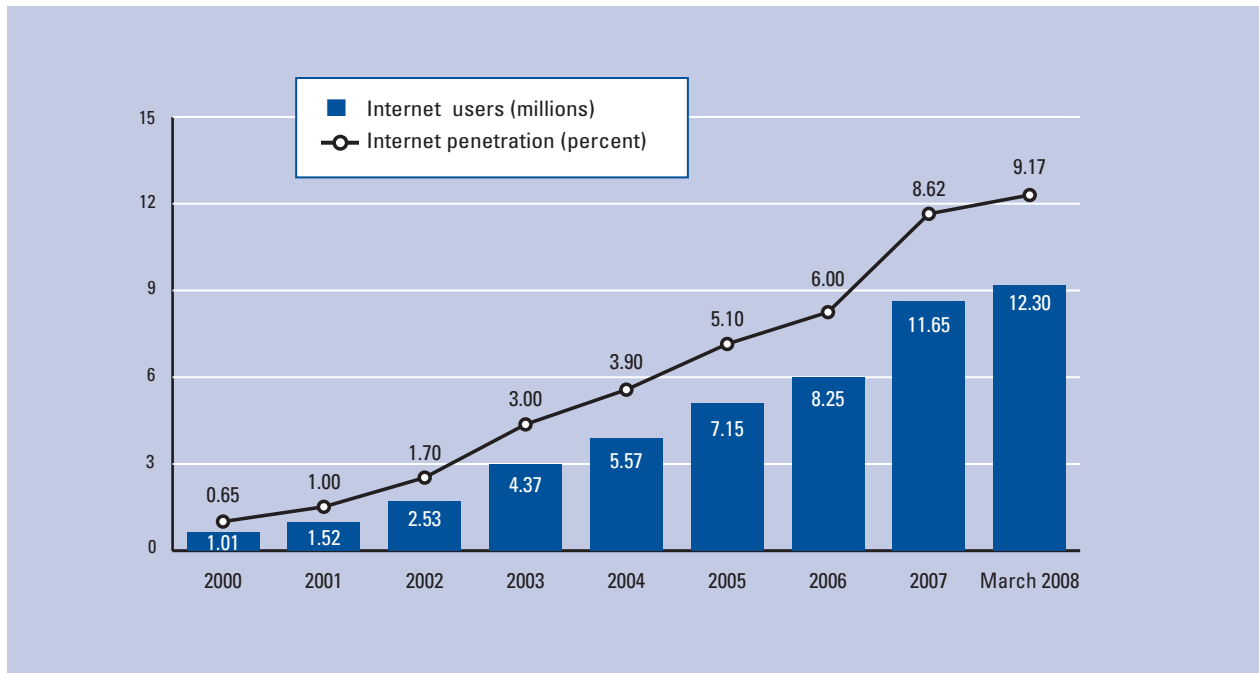
Note: The figures above refer to the greater Cairo metropolitan area alone, not the entire country.

**Figure 4: Total investment evolution, 2003–07**



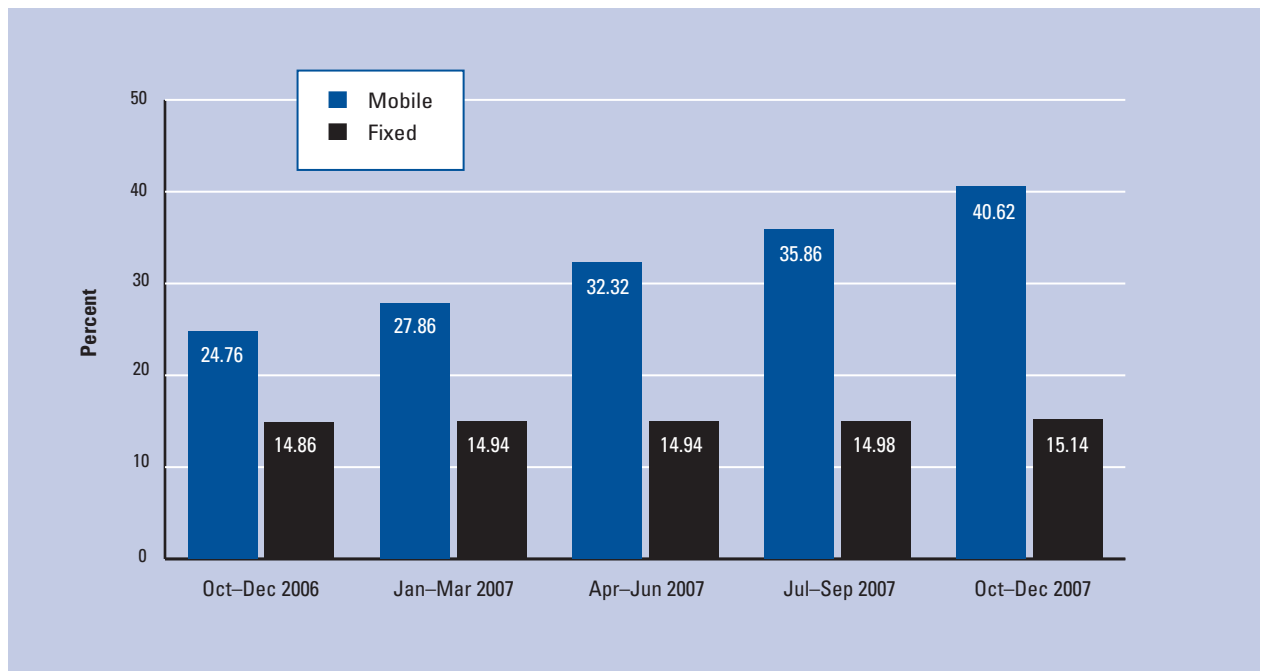
Source: McKinsey Global Institute, 2008a.

Figure 5: Internet users and penetration



Source: Ministry of Communications and Information Technology, Egypt.

Figure 6: Mobile and fixed telephony diffusion rates



Source: Ministry of Communications and Information Technology, Egypt.

Special projects have been launched to showcase the new business capabilities that such infrastructure makes possible. For example, Egypt's first Contact Center Park in Maadi should help the country to benefit from the strategic advantages described earlier. The Smart Village Business Park, located outside Cairo, has attracted a number of global IT players thanks to its state-of-the-art infrastructure. Additional business parks are planned in Alexandria, Damietta, and New Cairo.

### Providing a business-friendly environment

One of the main pillars of the business environment that has helped Egypt to attract outsourcing companies is its set of labor laws and regulations. Reforms of the Egyptian labor laws in 2003 created a very powerful, flexible workforce and removed many of the previous impediments to recruiting staff. Reforms have focused on creating a balance between employees' and employers' rights. Specifically, the reforms have addressed areas such as the employer's right to fire an employee under relevant conditions. The reforms also regulated the employee's right to strike peacefully according to a set of controls and procedures.

Since 2004, the Egyptian government has been consistently working to increase the attractiveness of Egypt's business environment. Hence an antitrust law and a unified tax law have been promulgated. The latter increased the transparency of the Egyptian tax system and reduced corporate and personal taxes by half (see Box 1).

#### Box 1: Egypt's main reforms

##### Tax reforms (initiated in 2005)

- Highest personal tax rate cut from 32 percent to 20 percent
- Corporate tax rate cut from 42 percent to 20 percent
- Streamlined collection procedures adopted

##### Customs reforms (initiated in 1991)

- Tariffs reduced from an average of 14.6 percent to 6.2 percent
- Tariff bands simplified and reduced from 27 to 6
- Streamlined customs procedures adopted

##### Financial sector reforms (initiated in 1991)

- Banking sector consolidated and restructured
- Privatization of public banks initiated
- Supervisory role of autonomous Central Bank strengthened
- Anti-money laundering regulations brought in line with international standards instated (2002)

The attractiveness of Egypt's business environment has been further enhanced by the government's incentive packages offered to investors, mentioned earlier. Besides tax exemptions, land price reductions, and easing of regulations, these packages include training programs for professionals in the ICT industry who are intended to be recruited by investors, and the assignment of a government official to facilitate investors' interaction with government organizations.

### Egypt's current and future challenges as a BPO champion

Thanks to the combination of structural advantages and government policies described above, Egypt has become one of the main success stories in the outsourcing scene of the last few years. However, in the current context of financial crisis and modified international economic relations, Egypt has to prepare for unprecedented challenges to maintain its position as a successful BPO destination.

Current and future challenges include, for example, intellectual property rights and security risks. Moreover, Egypt cannot afford to relax its efforts to promote itself as a BPO destination: on the international outsourcing scene, compared with pioneers such as China and India, it is still viewed as a relatively new player. The country must also improve access to finance and micro-financing for small- and medium-size enterprises.

In terms of human resources, Egypt's challenges include the lack of "middle-level graduates" (i.e., those who have achieved a level somewhere between that of university graduates and technical institute graduates). Such profiles are in high demand among outsourcing companies, especially those offering IT and engineering services. This shortage leads to hiring university graduates to perform less-skilled jobs that, in turn, de-motivates them and causes both a fast turnover and suboptimal use of financial resources and talents.

Overcoming potential middle management bottlenecks is another challenge that needs to be tackled. Egyptian middle managers lack the skills to run different processes and businesses. In that context, the efforts already deployed by the Egyptian government to encourage MNCs in transferring the know-how and the managerial skills required will need to be pursued.

In the rapid development of its outsourcing activities, Egypt has benefitted from the existence of a vibrant and abundant fabric of small- and medium-sized enterprises. This is now creating an additional challenge, as many of those small players have relied on their own set of norms, standards, and practices. Now faced with the rigors of international competition, such standards and practices need to be harmonized and brought in line with international benchmarks.

## Box 2: Seven lessons learned from Egypt's outsourcing experience

Among the lessons that other countries may wish to adapt from Egypt's success in outsourcing, the following are particularly clear:

1. Investment in the talent pool to enhance suitability is vital to ensure the long-term viability of the country's service delivery strategy. Similarly, it is crucial to ensure overall supply in terms of infrastructure and have connectivity at world-class levels and ahead of the demand curve.
2. Creation of a well-funded investment agency with adequate regulatory authority is critical. Egypt's ITIDA is an example of how a public-private partnership can work effectively in this domain.
3. A promotion campaign is essential after making sure that all requirements are already in place. It is only prudent to launch a marketing campaign for a location only when supply in terms of talent pool and infrastructure is ready. Documented examples of successful outsourcing ventures are the best marketers for a location.
4. Getting key decision makers, such as ministers, signed off and committed to an explicit target is a strong signal of overall commitment and is viewed very positively by investors.
5. There is a clear need to focus on fair, transparent policies and international regulatory laws such as employment laws, data security, and intellectual property laws.
6. International expertise and consultancy firms should be used in launching and implementing the early phase of the strategy so as to bring into the country the much-needed know-how and to open different opportunities.
7. Many high-impact programs—such as the incentive packages to encourage BPO foreign investors—must be in place to accelerate the growth of the industry; these should go hand in hand with programs to encourage local companies.

Last but not least, Egypt's ability to move from a monopoly-based telecommunications environment to a competitive market for telecommunication services will be a litmus test for many foreign investors contemplating an increase in their activities in the country, especially in the BPO sector.

## Conclusions

Egypt's efforts to build itself as a first-class competitor in the area of outsourcing have led to measurable success. They also offer a basis for further efforts and ambitions in this area.

The way in which Egypt has chosen to pursue this path can be a source of inspiration and reference for other emerging economies. A central characteristic of Egypt's strategy has been to focus on a few "natural" strengths (its young population, high level of education, and the availability of a language-proficient and internationally open talent pool), and to combine those with (1) a series of targeted government measures (especially on the regulatory side) and (2) a selected use of external expertise (especially in the early stages of the process).

Moreover, Egypt has put a critical emphasis on the merits of *communicating* about its outsourcing strategy and achievements, be it externally (to attract additional outsourcing partners from abroad) or internally (to encourage more Egyptian private businesses to be involved). Public-private partnerships have played a central role in building mutual respect among the various players involved and in feeding an appetite for further collaboration (see Box 2).

In the emerging global knowledge economy, the relative mobility of factors is changing as rapidly as their relative prices. In such a maelstrom of changes, outsourcing—and BPO in particular—is assuming different forms, directions, and volumes. Whether the current crisis leads companies to focus on cost reductions or on new strategies to conquer markets, BPO is bound to attract increasing interest worldwide. As the size of the outsourcing market increases, however, early and new contenders such as Egypt should expect increased competition.

For all outsourcing host countries, current or prospective, moving to (or staying at) the top of the list of BPO destinations will require a constant adaptation of national and corporate strategies as well as increased agility in responding to unexpected changes in relative factor prices. Central to such agility will be efforts to always maintain a high level of responsiveness in terms of the skills and human resources required. As e-skills (i.e., skills for the knowledge economy) continue to be further defined and identified across the world, national outsourcing strategies will remain a laboratory where inputs from governments and businesses will continue to be combined and shaped to provide innovative approaches and environments (see Box 3). In turbulent times even more than in quieter periods, innovative thinking and strategies will be required. There are reasons to think that Egypt will live up to the challenge.

### Box 3: Three examples of successful outsourcing strategies in Egypt

#### Orange Business Services

The MSC (Major Service Centre), established in Cairo, is the largest service center that Orange operates globally. Its physical security meets the highest standards required by Orange's global clients, and it provides many different services—such as solution designs, service delivery management, and online support and design implementations. It operates 24 hours a day, 7 days a week, and has a highly resilient network architecture. It provides service for a large array of technical functions for Orange's global multinational clients. The MSC currently employs more than 1,500 highly qualified and trained staff in the 23 languages supported by the company. The largest support teams are those that employ Arabic, English, French, German, Italian, and Spanish.

Orange Corporation has chosen Egypt for its qualified and low-cost talent pool and its ability to comply with technical and language requirements. Moreover, the government incentive package offered by the Egyptian government includes:

- reduced international circuit charges,
- relocation costs from downtown Cairo to the Smart Village, and
- reduced cost of staff training.

#### Oracle Global Support Center (GSC)

Oracle GSC is located in Cairo within the Smart Village. It employs over 400 world-class engineers to support over 100,000 customers in 140 countries worldwide. In 1999, Oracle group headquarters in the United States began investigating whether Egypt could make a good outsourcing destination and verified that the country's labor productivity and the quality of its infra-

structure were no less than they are in any other part of the world. It was opened in June 2005 with 20 engineers in its application product support division; currently, Egypt GSC is the fastest-growing center for Oracle around the globe. It started by importing its entire consultancy from abroad. Today, Oracle's Egypt GSC is satisfying all its human resources needs from Egypt.

Oracle has chosen the Egyptian market because of its time-zone affinity with Europe, its cost competitive environment, and the large highly skilled labor pool with multilingual skills: Arabic, English, French, German, Italian, and Spanish. Moreover, the excellent government support (including education programs for working Egyptian professionals) and an advanced telecommunications infrastructure are important advantages.

#### Xceed Contact Center

Xceed is one of the companies established in late 2001 to act as the IT arm for Telecom Egypt, the incumbent operator. Today Xceed is the largest and most sophisticated contact center in the southern Mediterranean region, offering BOP and inbound and outbound integrated customer contact solutions.

Arabic, English, French, Italian, Spanish, Greek, Portuguese, and Hebrew are languages currently supported by Xceed for its clients worldwide; it also has a capacity of 1,600 Web-enabled workstations.

#### Note

- 1 For example, Egypt won the first place for the best outsourcing provider for the year 2008 from the National British Society for Outsourcing Services.
- 2 The Information Technology Industry Development Agency (ITIDA) is a governmental entity affiliated with the Ministry of Communications and Information Technology. It is responsible for growing and developing Egypt's position as a leading global outsourcing location by attracting foreign direct investments to the industry and maximizing the exports of IT services and applications.
- 3 A. T. Kearney 2007.
- 4 Traditionally, Egyptians have been noted for their neutral accent in Arabic; moreover, the Egyptian Arabic dialect is commonly understood among Arab speaking countries.

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