



Talent Market Research

Client: Cinsystem.com

Project: Talent Mapping for CS Call Centre Placement research

Challenge: Select "best" location to build two new call center facilities in APAC region. Looking to find best locations to hire local bi-lingual residents to support the multitude of languages spoken.

Scope: Research covering eight (8) countries for 38 target languages plus Taiwanese Mandarin. Target countries include: China (incl. Hong Kong), Japan, Philippines, Thailand, Taiwan, Indonesia, Malaysia, and Vietnam

Date submitted: Friday February 23, 2016

Comments: Language population columns don't necessarily sum-up to the geo-region's population as often there are several other minor languages spoken or because there are people who speak multiple languages.

Presentation: Report findings presentation and recommendations will occur during conference call on Monday Feb 26 at 6pm PST.

Recommendation Recap

		Relative grading
PHILIPPINES	Big matching target pool; Call-centers are key industry	A
MALAYSIA	Huge multilingual population; Popular call center location	B+
CHINA	Emerging call-center industry; Huge talent pool	B
INDONESIA	Only one city appears as good potential (could evaluate)	C
THAILAND	Only one areas appears as potential (could evaluate)	C+
VIETNAM	English speaking bilingual population limited	D-
JAPAN	Call-centers focused on manufacturing; Less using English	D-
TAIWAN	Low-ranking on language skills and voice industry	D-

PHILIPPINES

ENGLISH SPEAKING POPULATION

57%

Table 1 (Linguistic census)

Geo-region	Quezon City	Cebu City	Manila	Caloocan	Davao City	PHILIPPINES
Population	2,761,720	2,619,362	1,652,171	1,489,040	1,449,296	107,668,231
Percentage of country population	3%	2%	2%	1%	1%	
Size of region	171.71 km2 (66.30 sq mi)	315.0 km2 (121.6 sq mi)	38.55 km2 (14.88 sq mi)	55.80 km2 (21.54 sq mi)	2,443.61 km2 (943.48 sq mi)	298,170 km2 115,120 sq mi
Population density	16,617/km2 (43,040/sq mi)	2,700/km2 (7,100/sq mi)	42,858/km2 (111,000/sq mi)	27,000/km2 (69,000/sq mi)	590/km2 (1,500/sq mi)	337.69/km2 874.61/sq mi
Speaks - FILIPPINO	1,154,262	1,094,764	690,526	622,345	605,734	45,000,000
ENGLISH	1,026,011	973,123	613,801	553,196	538,430	40,000,000

Table 2 (bilingual population - English plus target language)

#	ENGLISH plus...	Quezon City	Cebu City	Manila	Caloocan	Davao City	PHILIPPINES
6	Filipino	1,121,802	1,053,111	671,107	604,843	588,699	4,039,562
1	Spanish	833,416	782,384	498,583	449,354	437,360	3,001,097
2	Korean	737,502	692,343	441,203	397,640	387,026	2,655,714
3	Japanese	717,412	673,483	429,184	386,808	376,483	2,583,370
4	Italian	702,182	659,186	420,073	378,596	368,491	2,528,528
5	German	692,461	650,060	414,258	373,355	363,390	2,493,524
7	Arabic	554,747	520,778	331,871	299,103	291,120	1,997,619
8	Indonesian	519,103	487,317	310,548	279,885	272,415	1,869,268
9	Bahasa Malaysia	448,463	421,003	268,289	241,799	235,345	1,614,899
10	French	444,575	417,352	265,962	239,702	233,304	1,600,895
11	Russian	419,948	394,234	251,230	226,424	220,381	1,512,217
12	Dutch	396,618	372,332	237,273	213,845	208,137	1,428,205
13	Cantonese	339,912	319,098	203,349	183,271	178,379	1,224,009
14	Portuguese	324,358	304,497	194,044	174,885	170,217	1,168,001
15	Greek	311,721	292,633	186,484	168,071	163,585	1,122,494
16	Taiwanese	239,461	224,798	143,255	129,111	125,665	862,290
17	Thai	238,813	224,190	142,868	128,761	125,324	859,956
18	Vietnamese	180,487	169,435	107,975	97,313	94,716	649,926
19	Swedish	176,923	166,089	105,842	95,392	92,846	637,092
20	Turkish	173,358	162,743	103,710	93,470	90,975	624,256
21	Taiwanese Mandarin	161,693	151,792	96,731	87,180	84,853	582,249
22	Hebrew	159,101	149,359	95,180	85,783	83,493	572,916
23	Danish	129,938	121,981	77,734	70,059	68,189	467,901
24	Norwegian	128,642	120,765	76,959	69,360	67,509	463,235
25	Romanian	96,886	90,954	57,961	52,238	50,844	348,883
26	Finnish	69,667	65,401	41,678	37,563	36,560	250,869
27	Polish	59,622	55,971	35,668	32,147	31,289	214,697
28	Ukrainian	54,438	51,104	32,567	29,351	28,568	196,028
29	Czech	44,717	41,979	26,751	24,110	23,466	161,023
30	Hungarian	38,236	35,895	22,874	20,616	20,066	137,687
31	Serbian	33,051	31,028	19,773	17,820	17,345	119,017
32	Croatian	31,755	29,811	18,997	17,122	16,665	114,350
33	Bulgarian	15,878	14,905	9,499	8,561	8,332	57,175
34	Icelandic	13,609	12,776	8,142	7,338	7,142	49,007
35	Slovak	7,777	7,301	4,652	4,193	4,081	28,004
36	Estonian	7,129	6,692	4,265	3,844	3,741	25,671
37	Slovenian	4,861	4,563	2,908	2,621	2,551	17,504
38	Latvian	3,888	3,650	2,326	2,097	2,041	14,002
39	Lithuanian	2,268	2,129	1,357	1,223	1,190	8,167
	TOTAL	10,636,418	9,985,122	6,363,130	5,734,854	5,581,783	38,301,307
	As a % amongst Bilingual Population	28%	26%	17%	15%	15%	

PHILIPPINES

OBSERVATIONS

GREEN

- Philippines ranks #2 in outsourcing destinations according to the research study by Tholans group
- 36% of the total country population are bilingual
- 62% of the total English speaking population in the country are bilinguals in the cities selected for the study

RECOMMENDATION

GREEN

- Ideal destination to outsource

REFERENCES

- 1 <http://en.wikipedia.org/wiki/Philippines>
- 2 <https://www.cia.gov/library/publications/the-world-factbook/geos/rp.html>
- 3 <http://www.kpmg.com/PH/en/PHConnect/ArticlesandPublications/Documents/The%20Philippines-%20Outsourcing's%20ne>
- 4 <http://lkyspp.nus.edu.sg/wp-content/uploads/2014/12/Business-Process-Outsourcing-in-the-Philippines.pdf>
- 5 <http://www.ethnologue.com/country/PH>
- 6 http://www.bles.dole.gov.ph/learnstat/trends%20and%20patterns_V.5_052414.ppt

ASSOCIATIONS & SOCIAL GROUPS

- | | |
|---|-------------------------------------|
| 1 HR Philippines | 6 IELTS British Council Philippines |
| 2 University of the Philippines Alumni | 7 English Language Academy |
| 3 Expat Philippines | 8 Ethnic Groups Philippines |
| 4 British Council Philippines | 9 Little Japan in Manila |
| 5 American Institute for English Proficiency, Makati, Philippines | 10 Facebook Language Groups |
| 6 IELTS British Council Philippines | 11 LinkedIn Language Groups |

Government

- 1 Philippines Department of Labor and Employment
- 2 Department of Foreign Affairs (Philippines)

Job Portals

- | | |
|---------------------------|-----------------|
| 1 JobStreet | 7 Bestjobs.ph |
| 2 JobsDB.com | 8 Workabroad.ph |
| 3 Trabaho.com | 9 Jobrapido.com |
| 4 Onlinejobs.ph | 10 Sulit.com.ph |
| 5 Craigslist Manila | 11 Phil-JobNet |
| 6 Freelancer/Odesk/elance | |

Staffing Firms

- | | |
|------------------------------|--|
| 1 A&G Consultants | 5 Kittelson & Carpo Consulting |
| 2 PNI Group of Companies | 6 Diversify Intelligent Staffing Solutions |
| 3 PNI Management Philippines | 7 Kelly services |
| 4 Sourcefit Philippines Inc | |

Corporate

- | | |
|-------------------|----------------------------------|
| 1 Teleperformance | 5 Accenture |
| 2 24/7 Customer | 6 Cognizant Technology Solutions |
| 4 IBM | 7 Sutherland Global Services |

Academia

- | | |
|--|--|
| 1 Dong Nai University of Technology | 8 University of Makati |
| 2 Duy Tan University | 9 De La Salle University |
| 3 Hanoi Architectural University | 10 Ateneo de Manila University |
| 4 University of Southeastern Philippines | 11 University of the Philippines Los Baños |
| 5 University of the Philippines Diliman | 12 University of the Philippines System |
| 6 De La Salle-College of Saint Benilde | 13 University of Santo Tomas |
| 7 University of the Philippines | 14 University of the Philippines Manila |
| | 15 http://www.4icu.org/ph/ |

MALAYSIA

ENGLISH SPEAKING POPULATION

27%

Table 1 (Linguistic census)

Geo-region	KUALA LUMPUR	PENANG	KLANG	IPOH	JOHOR BAHRU	MALAYSIA
Population	1,600,000	2,292,394	744,062	1,499,000	3,348,283	30,526,000
Percentage of country population	5%	8%	2%	5%	11%	
Size of region	243 km ² (94 mi ²)	1,048 km ² (405 mi ²)	573 km ² (202 sq mi)	643 km ² (248 mi ²)	185 km ² (71 mi ²)	329,847 km ² (127,355 mi ²)
Population density	6,581/km ² (17,040/sq mi)	1,500/km ² (3,800/sq mi)	1,298/km ² (3,360/sq mi)	1,023/km ² (2,650/sq mi)	735/km ² (1,900/sq mi)	92/km ² (237/sq mi)
Speaks - BAHASA MALAYSIA	749,001	642,286	1,991,760	515,656	1,811,139	10,500,000
MANDARIN	782,673	670,400	2,553,390	290,165	1,034,713	6,960,900
CANTONESE	86,510	68,710	261,708	67,755	76,840	1,380,000

Table 2 (bilingual population - English plus target language)

#	ENGLISH plus...	KUALA LUMPUR	PENANG	KLANG	IPOH	JOHOR BAHRU	MALAYSIA
1	Mandarin	655,413	587,005	136,968	97,834	352,203	1,829,423
2	Bahasa Malaysia	729,236	561,751	131,075	93,625	337,051	1,852,738
3	Cantonese	71,812	64,883	15,139	10,814	38,930	201,578
4	Indonesian	47,083	35,312	8,240	5,885	21,187	117,707
5	Filipino	35,241	26,430	6,167	4,405	15,858	88,101
6	Korean	7,893	5,920	1,381	987	3,552	19,732
7	Taiwanese Mandrian	6,637	4,978	1,162	830	2,987	16,593
8	Vietnamese	5,933	4,450	1,038	742	2,670	14,833
9	Swedish	3,192	2,394	559	399	1,436	7,980
10	Spanish	2,983	2,237	522	373	1,342	7,458
11	Turkish	2,888	2,166	505	361	1,300	7,220
12	Danish	2,661	1,996	466	333	1,197	6,652
13	Hebrew	2,317	1,738	406	290	1,043	5,793
14	Romanian	2,267	1,701	397	283	1,020	5,669
15	Polish	2,207	1,655	386	276	993	5,518
16	Russian	2,179	1,634	381	272	981	5,448
17	French	2,119	1,589	371	265	953	5,296
18	Thai	2,000	1,500	350	250	900	5,001
19	Italian	1,708	1,281	299	213	768	4,269
20	Dutch	1,438	1,078	252	180	647	3,594
21	Serbian	1,006	754	176	126	453	2,515
22	Japanese	957	718	167	120	431	2,392
23	Arabic	957	718	167	120	431	2,392
24	Hungarian	885	664	155	111	398	2,212
25	German	787	590	138	98	354	1,967
26	Portuguese	766	574	134	96	345	1,914
27	Ukrainian	730	547	128	91	328	1,824
28	Norwegian	719	540	126	90	324	1,798
29	Bulgarian	401	301	70	50	181	1,003
30	Greek	371	278	65	46	167	927
31	Croatian	338	253	59	42	152	844
32	Finnish	275	206	48	34	124	688
33	Czech	261	195	46	33	117	652
34	Slovak	215	161	38	27	97	536
35	Icelandic	209	157	37	26	94	524
36	Lithuanian	163	123	29	20	74	409
37	Estonian	118	89	21	15	53	295
38	Latvian	118	88	21	15	53	294
39	Slovenian	93	69	16	12	42	232
TOTAL	1,758,298	1,318,723	307,702	219,787	791,234	4,395,744	
As a % amongst Bilingual Population	40%	30%	7%	5%	18%		

*Source Pools: Social media, associations, job boards, academia, expatriates, forums & groups, phone and email surveys

Bilingual population count in Malaysia cannot be compared most spoken language as majority of the Malaysians are polyglots.

MALAYSIA

OBSERVATIONS

GREEN

- Malaysia stands 3rd amongst the global destinations for outsourcing (AT Kearney 2014 research) [Link](#)
- Kuala Lumpur and Penang are the most preferred destination for contact centers. They rank 19 and 67 in the research conducted by Tholans Group [Link](#)
- 53% of the total English speaking population in the country are bilinguals in the cities selected for the study
- 40% of bilingual English speaking population live in Kuala Lumpur
- 14% of the total country population are bilingual
- English language is a main medium of instruction in private universities and colleges
- State of Selangor has the largest economy in Malaysia in terms of gross domestic product (GDP)
- Malaysian govt. emphasized the learning of English under the new education blueprint. The move is to prepare students for 2016, the year from which it is compulsory to pass english for secondary examination.
- Since independence from the British in 1957, the country has phased out schools that teach in English. By the early 1980s, students were learning in the national language of Malay. There was almost 30 years gap in learning English. As a result, analysts say Malaysian graduates became less employable in the IT sector.

RECOMMENDATION

GREEN

- Further research is recommended for this country by proceeding to phase-2 of the project

REFERENCES & SOURCES

- 1 <http://en.wikipedia.org/wiki/Malaysia>
- 2 <http://www.universitymalaysia.net/about-malaysia/>
- 3 <http://repository.um.edu.my/750/4/Final%20Draft.pdf>
- 4 <http://www.todayonline.com/world/asia/malaysia-moves-improve-students-standard-english>
- 5 <http://www.bbc.com/news/magazine-17105569>
- 6 <http://www.ccam.com.my/>
- 7 <http://joshuaproject.net>
- 8 <https://www.cia.gov>
- 9 <http://www.statistics.gov.my/>
- 10 <http://countrycomparator.com/statistics/15/english-speaking-percentage-2010>
- 11 www.etnologue.com

Associations, Societies & Social Groups

- 1 The Multilingual Society in KL
- 2 KL Language Exchange
- 3 Kuala Lumpur Business Networking Meetup Group
- 4 Aspiring Bilingual Speakers (ABS) Japanese & English
- 5 International community - Flat world
- 6 Professional Edge Consulting Malaysia - "Hiring The Best Malaysian Talent"
- 7 Malaysia HR Network Online
- 8 Malaysia Top Recruitment
- 9 Team 1 Malaysia : HR, Procurement ,Recruitment and IT Professionals
- 10 Malaysia Recruiters Club
- 11 Malaysia Executive Search
- 12 Translators and Proofreaders in Malaysia
- 13 Human Resources Malaysia
- 14 Executive Search - Recruitment (Malaysia)
- 15 Malaysia Human Resource Society
- 16 Market Research Malaysia
- 17 Facebook Language Groups
- 18 LinkedIn Language Groups

Government

- 1 Department of Statistics of Malaysia
- 2 Ministry of Human Resources of Malaysia
- 3 Ministry of Foreign Affairs of Malaysia

Job Portals

- 1 JobsDB.com
- 2 Jobstreet
- 3 Monster
- 4 JenJOBS.com
- 5 Indeed
- 6 Splashfind
- 7 mudah.my
- 8 myStarjob.com
- 9 Best Jobs
- 10 maukerja.my

Corporate and Academia

- 1 Surveyed leading multi-national firms
- 2 Academia (Private Colleges & Universities)

CHINA

ENGLISH SPEAKING POPULATION

1%

Table 1 (Linguistic census)

Geo-region	CHONGQING	SHANGHAI	BEIJING	CHENGDU	SHENZHEN	DALIAN (Dairen)	HONG KONG	CHINA
Population	28,846,170	23,019,148	19,612,368	14,047,625	10,630,000	6,690,432	7,055,071	1,355,692,576
Percentage of country pop	2%	2%	1%	1%	1%	0.5%	1%	
Size of region	82,403 km2 (31,816 sq mi)	6,340.5 km2 (2,448.1 sq mi)	16,411 km2 (6,336.1 sq mi)	12,163.16 km2 (4,696.2 sq mi)	1,991.64 km2 (768.98 sq mi)	13,237 km2 (5,111 sq mi)	1,104 km2 426 sq mi	9,596,961 km2 3,705,407 sq mi
Population density	379/km2 977/sq mi	3,800/km2 (9,900/sq mi)	1,300/km2 (3,400/sq mi)	1,200/km2 (3,000/sq mi)	5,300/km2 (14,000/sq mi)	532.09/km2 (1,378.1/sq mi)	6,544[5]/km2 17,024/sq mi	145/km2 373/sq mi
Speaks - MANDARIN	18,604,443	14,846,284	12,649,069	9,060,067	6,855,857	4,315,019	98,771	874,358,900
CANTONESE	1,511,703	1,206,334	1,027,800	736,175	557,072	0	6,314,289	71,046,000

Table 2 (bilingual population - English plus target language)

#	ENGLISH plus...	CHONGQING	SHANGHAI	BEIJING	CHENGDU	SHENZHEN	DALIAN (Dairen)	HONG KONG	CHINA
1	Mandarin	489,836	395,637	339,117	244,918	188,398	113,039	113,039	1,883,984
2	Cantonese	367,377	296,727	254,338	183,688	141,299	84,779	84,779	1,412,987
3	Korean	244,918	197,818	169,559	122,459	94,199	56,520	56,520	941,993
4	Spanish	186,306	150,478	128,981	93,153	71,656	42,994	42,994	716,562
5	French	160,858	129,924	111,363	80,429	61,869	37,121	37,121	618,685
6	Arabic	147,198	118,891	101,906	73,599	56,615	33,969	33,969	566,147
7	Bahasa Malaysia	140,943	113,838	97,576	70,471	54,209	32,525	32,525	542,087
8	Indonesian	129,070	104,249	89,356	64,535	49,642	29,785	29,785	496,422
9	German	82,897	66,956	57,390	41,449	31,884	19,130	19,130	318,836
10	Taiwanese	81,280	65,649	56,271	40,640	31,262	18,757	18,757	312,616
11	Russian	81,195	65,581	56,212	40,598	31,229	18,737	18,737	312,289
12	Japanese	73,025	58,981	50,555	36,512	28,086	16,852	16,852	280,863
13	Portuguese	70,684	57,091	48,935	35,342	27,186	16,312	16,312	271,862
14	Vietnamese	69,833	56,404	48,346	34,916	26,859	16,115	16,115	268,588
15	Thai	61,152	49,392	42,336	30,576	23,520	14,112	14,112	235,200
16	Italian	59,747	48,257	41,364	29,874	22,980	13,788	13,788	229,798
17	Dutch	40,300	32,550	27,900	20,150	15,500	9,300	9,300	155,000
18	Turkish	40,129	32,412	27,782	20,065	15,434	9,261	9,261	154,344
19	Filipino	28,554	23,063	19,768	14,277	10,982	6,589	6,589	109,822
20	Swedish	26,086	21,070	18,060	13,043	10,033	6,020	6,020	100,332
21	Polish	17,703	14,299	12,256	8,851	6,809	4,085	4,085	68,088
22	Greek	17,405	14,058	12,050	8,703	6,694	4,017	4,017	66,944
23	Hebrew	15,958	12,889	11,048	7,979	6,138	3,683	3,683	61,378
24	Danish	15,277	12,339	10,577	7,639	5,876	3,526	3,526	58,760
25	Ukrainian	12,001	9,693	8,308	6,000	4,616	2,769	2,769	46,156
26	Romanian	11,788	9,521	8,161	5,894	4,534	2,720	2,720	45,338
27	Norwegian	8,426	6,806	5,833	4,213	3,241	1,944	1,944	32,407
28	Finnish	8,128	6,565	5,627	4,064	3,126	1,876	1,876	31,262
29	Hungarian	8,085	6,531	5,598	4,043	3,110	1,866	1,866	31,099
30	Serbian	6,085	4,915	4,213	3,043	2,341	1,404	1,404	23,405
31	Czech	5,702	4,606	3,948	2,851	2,193	1,316	1,316	21,932
32	Bulgarian	3,617	2,922	2,504	1,809	1,391	835	835	13,913
33	Croatian	3,490	2,818	2,416	1,745	1,342	805	805	13,421
34	Slovak	2,128	1,719	1,473	1,064	818	491	491	8,184
35	Icelandic	1,702	1,375	1,178	851	655	393	393	6,547
36	Latvian	1,660	1,340	1,149	830	638	383	383	6,383
37	Lithuanian	1,489	1,203	1,031	745	573	344	344	5,729
38	Estonian	1,192	962	825	596	458	275	275	4,583
39	Slovenian	681	550	471	340	262	157	157	2,618
	TOTAL	2,723,905	2,200,079	1,885,781	1,361,954	1,047,657	628,594	628,594	10,476,564
	As a % amongst Bilingual Population	26%	21%	18%	13%	10%	6%	6%	

CHINA

OBSERVATIONS

GREEN

- China ranks #2 in the AT Kearney's 2014 report on ideal global destinations to outsource
- 77% of the total English speaking bilingual population are in the cities selected for the study
- 26% of the total English speaking bilingual population lives in Chongqing
- English is one of the official languages in Hong Kong, and is used widely in the Government, academic circles, business and the courts. All road and government signs are bilingual and English is as equally valid as Chinese on legal and business standings.

[Link](#)

RECOMMENDATION

GREEN

- China continues to aggressively position itself as a top SSO destination and is making an effort to "industrialize" this sector. This has created a strong, domestically focused industry as well as an

REFERENCES

- 1 <http://www.kpmg.com/CN/en/IssuesAndInsights/ArticlesPublications/Documents/Outsourcing-destinat>
- 2 http://www.tholons.com/nl_pdf/Tholons_Whitepaper_December_2014.pdf
- 3 <http://www.atkearney.com/research-studies/global-services-location-index>
- 4 <http://www.ethnologue.com/country/CN>
- 5 <http://en.wikipedia.org/wiki/China>
- 6 http://en.wikipedia.org/wiki/Demographics_of_China
- 7 <https://www.cia.gov/library/publications/the-world-factbook/geos/ch.html>
- 8 http://cba.upd.edu.ph/docs/DP/0602_ALAVA.pdf
- 9 https://www.hsbc.com.cn/1/PA_ES_Content_Mgmt/content/china/commercial/internationalbanking/in
- 10 <http://www.sourcingmag.com/special-report-outsourcing-to-china-part-1/>

ASSOCIATIONS & SOCIAL GROUPS

- | | |
|---------------------------------|----------------------------------|
| 1 China Expats & Returnees Jobs | 4 Training and Development China |
| 2 China HR Network | 5 Expats Working in China |
| 3 China Networking Group | 6 Facebook Language Groups |
| | 7 LinkedIn Language Groups |

Government

- 1 Ministry of Foreign Affairs of the People's Republic of China
- 2 Ministry of Labor and Social Security - China

Job Portals

- | | | |
|----------------|---------------------|---------------------------|
| 1 Zhaopin.com | 4 51job.com | 7 eFinancialCareers China |
| 2 CareerEngine | 5 Monster Hong Kong | 8 Meijob |
| 3 Matchdragon | 6 Recruit.net China | 9 Careerbuilder.com |
| | | 10 Indeed.com |

Staffing Firms

- | | |
|---------------------------|------------------|
| 1 FESCO Adecco | 4 Randstad China |
| 2 Experis | 5 Kelly Services |
| 3 Manpower Group Solution | 6 Gi Group |

Corporate

- | | | |
|------------------------------------|-----------------------------|----------------------------|
| 1 Hudson | 9 HSBC | 17 Joby Metal |
| 2 Futurestep, A Korn Ferry Company | 10 Sunrise Finance | 18 Qualcomm Asia Pacific |
| 3 Vulture | 11 Korn Ferry/FutureStep | 19 Shanghai General Motors |
| 4 ADEN Services | 12 Moody's Corporation | 20 ChinaHR.com |
| 5 Xiao Nan Guo Holdings Ltd. | 13 Dräger | 21 Sony |
| 6 itz-Carlton Hotel Company LLC | 14 Cargill | 22 Chrysler Group LLC |
| 7 Caterpillar Inc. | 15 Wang & Li Asia Resources | 23 Avery Dennison |
| 8 Scope International | 16 JD.COM | 24 Mtime |
| | | 25 Abbott |

Academia

- | | |
|------------------------------------|---|
| 1 NYU Shanghai University | 5 Asia-Pacific International University |
| 2 Peking University | 6 Beijing Forestry University |
| 3 Tsinghua University | 7 Nankai University |
| 4 Qingdao Technological University | 8 Tianjin University |

INDONESIA

ENGLISH SPEAKING POPULATION

5%

Table 1 (Linguistic census)

Geo-region	JAKARTA	SURABAYA	BANDUNG	MEDAN	INDONESIA
Population	9,769,000	2,787,000	2,429,000	2,118,000	253,609,643
Percentage of country population	4%	1%	1%	1%	
Size of region	664.00 km2 256.37 sq mi	374.78 km2 144.70 sq mi	167.67 km2 64.74 sq mi	265.10 km2 102.36 sq mi	1,904,569 km2 735,358 sq mi
Population density	14,440/km2 37,400/sq mi	8,300/km2 22,000/sq mi	15,000/km2 40,000/sq mi	7,912/km2 20,490/sq mi	124.66/km2 322.87/sq mi
Speaks -BAHASA INDONESIA	8,499,030	2,424,690	2,113,230	1,842,660	221,398,286
BAHASA MALAYSIA	7,717,510	2,201,730	1,918,910	1,673,220	200,000,000
MANDARIN	1,758,420	19,788	17,246	15,038	460,000
CANTONESE	6,838	1,951	1,700	1,483	180,000

Table 2 (bilingual population - English plus target language)

#	ENGLISH plus...	JAKARTA	SURABAYA	BANDUNG	MEDAN	INDONESIA
1	Bahasa Indonesia	2,001,882	428,975	228,787	200,188	2,859,832
2	Bahasa Malaysia	1,817,801	389,529	207,749	181,780	2,596,859
3	Mandarin	288,655	61,855	32,989	28,866	412,365
4	Filipino	127,367	27,293	14,556	12,737	181,954
5	Arabic	114,050	24,439	13,034	11,405	162,929
6	Dutch	25,796	5,528	2,948	2,580	36,851
7	Japanese	20,959	4,491	2,395	2,096	29,942
8	French	8,545	1,831	977	854	12,207
9	German	8,384	1,797	958	838	11,977
10	Portuguese	3,652	783	417	365	5,217
11	Korean	1,869	400	214	187	2,669
12	Greek	1,862	399	213	186	2,660
13	Italian	1,811	388	207	181	2,587
14	Taiwanese Mandrian	1,648	353	188	165	2,354
15	Cantonese	1,611	345	184	161	2,301
16	Russian	1,574	337	180	157	2,248
17	Thai	1,545	331	177	154	2,206
18	Turkish	1,201	257	137	120	1,716
19	Hebrew	1,161	249	133	116	1,658
20	Vietnamese	856	183	98	86	1,223
21	Danish	742	159	85	74	1,059
22	Spanish	687	147	78	69	981
23	Polish	476	102	54	48	679
24	Norwegian	445	95	51	44	636
25	Czech	427	92	49	43	610
26	Swedish	413	88	47	41	590
27	Romanian	393	84	45	39	562
28	Hungarian	382	82	44	38	546
29	Bulgarian	343	74	39	34	491
30	Finnish	308	66	35	31	440
31	Croatian	240	51	27	24	343
32	Serbian	234	50	27	23	334
33	Ukrainian	198	42	23	20	283
34	Slovak	189	40	22	19	269
35	Slovenian	126	27	14	13	180
36	Estonian	124	27	14	12	177
37	Icelandic	110	23	13	11	157
38	Lithuanian	58	12	7	6	83
39	Latvian	47	10	5	5	67
TOTAL	4,438,169	951,036	507,219	443,817	6,340,241	
As a % amongst Bilingual Population	70%	15%	8%	7%		

INDONESIA

OBSERVATIONS

YELLOW

- Indonesia stands 5th amongst the global destinations for outsourcing (AT Kearney 2014 research)
- Jakarta is the most preferred destination for contact centers. It ranks 55th in the research conducted by Tholons
- 50% of the total English speaking bilingual population are in the cities selected for the study
- 70% of the total English speaking bilingual population lives in Jakarta
- More than 55% of the country speak Javanese and Sundanese (which are not of interest to Cinsystem.com)
- The policy in Indonesia has never recognized English as an official or second language.

RECOMMENDATION

YELLOW

- Indonesia relatively has a smaller pool of English speaking bilingual population

REFERENCES

- 1 <http://www.worldometers.info/world-population/indonesia-population/>
- 2 <http://www.atkearney.com/research-studies/global-services-location-index>
- 3 http://www.tholons.com/nl_pdf/Tholons_Whitepaper_December_2014.pdf
- 4 http://www.ranker.com/list/the-top-ten-countries-for-outsourcing-business/mcorn310?var=2&utm_expid=16418821-98.m;
- 5 <https://www.cia.gov/library/publications/the-world-factbook/geos/id.html>
- 6 <http://international.ui.ac.id/apru/commitee-academic.html>

ASSOCIATIONS & SOCIAL GROUPS

- 1 Multilingual Society: Chinese+Indonesian+Japanese+Korean
- 2 Jakarta Expats Social and Business Networking Meetup
- 3 Bandung Startup Community
- 4 Bandung Internet of Things Meetup
- 5 ESL Blog
- 6 Facebook Language Groups
- 7 LinkedIn Language Groups

Government

- 1 Central Bureau of Statistics (Statistics Indonesia)
- 2 Ministry of Manpower and Transmigration Republic of Indonesia
- 3 Ministry of Foreign Affairs
- 4 Ministry of Culture

Job Portals

- 1 Bestjobsindonesia
- 2 Jobsdb
- 3 Jobstreet
- 4 Karir
- 5 Detikjobs
- 6 Datakarir
- 7 Jobindo
- 8 Datalowongankerja
- 9 Indodevjobs
- 10 Carikerja
- 11 Monster

Academia

- 1 Institut Teknologi Bandung
- 2 Universitas Gadjah Mada
- 3 Universitas Indonesia
- 4 Universitas Brawijaya
- 5 Universitas Sebelas Maret
- 6 Universitas Airlangga
- 7 Universitas Pendidikan Indonesia
- 8 Universitas Gunadarma
- 9 Universitas Diponegoro
- 10 Institut Pertanian Bogor
- 11 Universitas Negeri Yogyakarta
- 12 Universitas Padjadjaran
- 13 Universitas Sumatera Utara
- 14 Universitas Bina Nusantara

Corporate

- 1 Prudential Indonesia
- 2 HM Sampoerna
- 3 Astra International
- 4 Unilever
- 5 Telkom
- 6 BRI
- 7 Semen Indonesia
- 8 Gudang Garam

Staffing Firms

- 1 Blue Steps
- 2 Elite Intel Recruit
- 3 Robert Walters
- 4 JAC Recruitment
- 5 Monroe Consulting
- 6 Lansima
- 7 Kelly Services
- 8 Expat.or
- 9 RGF Hragent Asia

THAILAND

ENGLISH SPEAKING POPULATION

10%

Table 1 (Linguistic census)

Geo-region	BANGKOK	NONTHABURI	NAKHON RA.	CHIANG MAI	THAILAND
Population	5,782,159	270,609	174,332	174,235	67,741,401
Percentage of country population	9%	4%	3%	3%	
Size of region	1,568.737 km2 (605.693 sq mi)	38.90 km2 (15.02 sq mi)	37.5 km2 (14.5 sq mi)	40.216 km2 (15.527 sq mi)	513,120 km2 198,115 sq mi
Population density	5,300/km2 (14,000/sq mi)	6,600/km2 (17,000/sq mi)	4,432.45/km2 (11,480.0/sq mi)	3,687/km2 (9,550/sq mi)	132.1/km2 342/sq mi
Speaks -THAI (TAI / SAI MESE)	3,414,254	159,789	102,940	102,882	40,000,000
MALAY	59,408	2,780	1,791	1,790	696,000
VIETNAMESE	10,072	471	304	304	118,000
MANDARIN	6,316	296	190	190	74,000
CANTONESE	3,244	152	98	98	38,000
JAPANESE	1,195	56	36	36	14,000
KOREAN	606	28	18	18	7,100
FRENCH	341	16	10	10	4,000

Table 2 (bilingual population - English plus target language)

#	ENGLISH plus...	BANGKOK	NONTHABURI	NAKHON RA.	CHIANG MAI	THAILAND
1	Thai	3,239,079	151,591	97,658	97,604	3,585,932
2	Bahasa Malaysia	596,423	27,913	17,982	17,972	660,290
3	Vietnamese	101,118	4,732	3,049	3,047	111,946
4	Mandarin	63,413	2,968	1,912	1,911	70,203
5	Cantonese	32,563	1,524	982	981	36,050
18	Swedish	32,483	1,520	979	979	35,962
35	Indonesian	23,717	1,110	715	715	26,257
24	Filipino	21,403	1,002	645	645	23,694
25	Portuguese	21,317	998	643	642	23,600
29	German	17,997	842	543	542	19,924
36	Italian	16,109	754	486	485	17,834
9	Spanish	15,502	725	467	467	17,162
10	Arabic	14,477	678	436	436	16,027
6	Japanese	11,997	561	362	362	13,282
11	Russian	11,384	533	343	343	12,603
27	Dutch	11,157	522	336	336	12,351
26	Turkish	8,643	404	261	260	9,568
7	Korean	6,084	285	183	183	6,736
19	Danish	4,762	223	144	144	5,272
30	Greek	4,668	218	141	141	5,167
31	Hebrew	3,785	177	114	114	4,191
8	French	3,428	160	103	103	3,795
20	Norwegian	3,112	146	94	94	3,445
37	Polish	2,742	128	83	83	3,035
38	Romanian	2,732	128	82	82	3,025
32	Finnish	2,647	124	80	80	2,930
28	Hungarian	1,973	92	59	59	2,185
39	Ukrainian	1,878	88	57	57	2,080
12	Serbian	1,442	67	43	43	1,596
21	Czech	1,205	56	36	36	1,334
22	Croatian	816	38	25	25	903
34	Icelandic	626	29	19	19	693
13	Slovak	474	22	14	14	525
14	Bulgarian	417	20	13	13	462
33	Estonian	370	17	11	11	410
15	Latvian	361	17	11	11	399
23	Taiwanese Mandrian	323	15	10	10	357
16	Lithuanian	313	15	9	9	347
17	Slovenian	294	14	9	9	326
	TOTAL	4,283,233	200,458	129,139	129,068	4,741,898
	As a % amongst Bilingual Population	90%	4%	3%	3%	

THAILAND

OBSERVATIONS

YELLOW

- Seven percentage (7%) is the population of the four cities selected for this study against the country population
- More than 55% of the country speak Javanese and Sundanese
- 70% of the total English speaking bilingual population are in the cities selected for the study
- 90% of the total English speaking bilingual population lives in Bangkok
- Thai contact centre outsourcers cater to the domestic market, and therefore do not face serious competition from any other country

[Link](#)

RECOMMENDATION

YELLOW

- Thailand is an emerging destination for outsourcing. We infer Bangkok has the majority of English speaking population while the language is not widely spoken in rest of the country

REFERENCES

- 1 <http://www.worldometers.info/world-population/indonesia-population/>
- 2 <http://www.atkearney.com/research-studies/global-services-location-index>
- 3 http://www.tholons.com/nl_pdf/Tholons_Whitepaper_December_2014.pdf
- 4 http://www.ranker.com/list/the-top-ten-countries-for-outsourcing-business/mcorn310?var=2&utm_expid=16418821-98.m
- 5 <https://www.cia.gov/library/publications/the-world-factbook/geos/id.html>
- 6 <https://xpat.life/thailand/english>
- 7 <http://www.zdnet.com/article/thailand-contact-center-industry-on-the-rise/>

ASSOCIATIONS & SOCIAL GROUPS

- | | |
|--|---------------------------------------|
| 1 Bangkok COW English Meetup & International Party | 4 TOEFL Teachers and Tutors Bangkok |
| 2 Bangkok Thai-English Language Exchange | 5 Japanese Class of Thailand |
| 3 The Original Bangkok Language Exchange meetup By Tao | 6 Facebook Language Groups |
| | 7 LinkedIn Language Groups |

Government

- 1 Ministry of Labour
- 2 Thailand Ministry of Foreign Affairs
- 3 National Statistical Office of Thailand

Job Portals

- | | |
|---------------|----------------------|
| 1 JOBSDB.com | 4 Jobtopgun |
| 2 Monster.com | 5 JobStreet Thailand |
| 3 JobThai | 6 Jobbees |
| | 7 Monster |

Staffing Firms

- | | |
|---------------------|--|
| 1 Robert Walters | 4 Thai Websites (list of recruitment firms) |
| 2 Kelly Services | 5 Recruitment Consultants Thailand (directory) |
| 3 Matthew Placement | 6 SS Recruitment |

Corporate

- | | |
|------------------------|--------------------------------------|
| 1 PTT PCL | 8 Advanced Info Service |
| 2 Siam Commercial Bank | 9 Thai Beverage |
| 3 Kasikornbank | 10 Bank of Ayudhya |
| 4 PTT Global Chemical | 11 CP All |
| 5 Siam Cement | 12 Dong Nai University of Technology |
| 6 Bangkok Bank | 13 Duy Tan University |
| 7 Krung Thai Bank | 14 Hanoi Architectural University |

Academia

- | | |
|-------------------------------------|---|
| 1 Stamford International University | 14 Mahachulalong University (MCU) |
| 2 Asian University | 15 Mahidol University (MU) |
| 3 Assumption University | 16 Naresuan University Bangkok Campus (NUBKK) |
| 4 Bangkok University (BU) | 17 Payap University |
| 5 Burapha University (BUU) | 18 Prince of Songkla University (PSU) |
| 6 Chiang Mai University (CMU) | 19 Ramkhamhaeng University (RU) |
| 7 Christian University of Thailand | 20 Rangsit University (RSU) |
| 8 Chulalongkorn University (Chula) | 21 Shinawatra University (SIU) |
| 9 Dhurakij Pundit University (DPU) | 22 Siam University |
| 10 Hatyai University | 23 Silpakorn University |
| 11 Kasetsart University (KU) | 24 Srinakharinwirot University (SWU) |
| 12 Khon Kaen University (KKU) | 25 Sripatum University |
| 13 Mae Fah Luang University (MFU) | 26 Webster University Thailand |

VIETNAM

ENGLISH SPEAKING POPULATION

1%

Table 1 (Linguistic census)

Geo-region	HO CHI MINH CITY	HANOI	HAI PHONG	CAN THO	VIETNAM
Population	7,162,864	6,448,837	1,837,302	1,187,089	93,421,835
Percentage of country population	7%	7%	2%	1%	
Size of region	2,095.6 km2 (809.23 sq mi)	3,324.3 km2 (186.22 sq mi)	1,527.4 km2 (5,897 sq mi)	1,389.6 km2 (536.5 sq mi)	332,698 km2 (128,565 sq mi)
Population density	3,797.14/km2 9,834.5/sq mi	2,126.05/km2 5,506.4/sq mi	1,260.77/km2 3,265.4/sq mi	874/km2 (2,260/sq mi)	273.11/km2 707.4/sq mi
Speaks -VIETNAMESE	5,750,420	5,177,192	1,475,005	953,007	75,000,000
THAI	128,932	116,079	33,071	21,368	1,681,593
CANTONESE	79,402	71,487	20,367	13,159	1,035,600
FRENCH	35,691	32,133	9,155	5,915	465,500

Table 2 (bilingual population - English plus target language)

#	ENGLISH plus...	HO CHI MINH CITY	HANOI	HAI PHONG	CAN THO	VIETNAM
1	Vietnamese	322,921	290,731	82,831	53,517	750,000
2	Taiwanese Mandrian	8,400	7,536	2,147	1,387	19,470
3	Thai	7,240	6,519	1,857	1,200	16,816
4	Cantonese	4,459	4,014	1,144	739	10,356
5	Mandarin	3,604	3,245	924	597	8,370
6	Spanish	3,586	3,229	920	594	8,329
7	Bahasa Malaysia	3,200	2,881	821	530	7,432
8	Russian	2,537	2,284	651	420	5,892
9	French	2,004	1,804	514	332	4,655
10	German	770	693	198	128	1,788
11	Arabic	715	644	183	118	1,661
12	Italian	520	468	133	86	1,208
13	Korean	438	394	112	73	1,017
14	Portuguese	325	293	83	54	755
15	Filipino	241	217	62	40	560
16	Dutch	234	211	60	39	543
17	Danish	175	158	45	29	406
18	Turkish	169	152	43	28	393
19	Ukrainian	146	131	37	24	339
20	Czech	121	109	31	20	281
21	Swedish	99	89	25	16	230
22	Polish	98	88	25	16	228
23	Greek	94	85	24	16	218
24	Hebrew	75	68	19	12	174
25	Romanian	65	59	17	11	151
26	Hungarian	61	55	16	10	142
27	Norwegian	54	49	14	9	125
28	Finnish	53	48	14	9	123
29	Bulgarian	47	42	12	8	109
30	Japanese	40	36	10	7	92
31	Croatian	32	29	8	5	74
32	Slovak	25	23	6	4	58
33	Serbian	23	21	6	4	53
34	Indonesian	18	16	5	3	42
35	Icelandic	13	12	3	2	30
36	Estonian	8	7	2	1	19
37	Latvian	6	5	2	1	14
38	Slovenian	5	5	1	1	12
39	Lithuanian	5	5	1	1	12
TOTAL		362,626	326,451	93,007	60,092	842,177
As a % amongst Bilingual Population		43%	39%	11%	7%	

*Source Pools: Social media, associations, job boards, academia, expatriates, forums & groups, phone and email surveys

VIETNAM

OBSERVATIONS

RED

- Vietnam stands 12th amongst the global destinations for outsourcing (AT Kearney 2014 research).
- 1% of the total English speaking population in the country are bilinguals in the cities selected for the study
- 43% of bilingual English speaking population live in Ho Chi Minh City
14% of the total country population are bilingual
- Vietnam remains weak in BPO and voice services, its improvement in the rankings likely comes primarily from the growing size and strength of its ITO sector [Link](#)
- The availability of talent and the general business environment in the country, on the other hand, present challenges that Vietnam will need to overcome if it seeks to rise any higher in the rankings. [Link](#)
- Both Tholan's Research and AT Kearny's report shows the cities Ho Chi Minh & Hanoi ranking within the top 25 ITO destinations to outsource. Though, the country tends to be strong in a few keys areas and lacks depth in a complete range

RECOMMENDATION

RED

- Vietnam is emerging as an outsourcing destination. It is currently dominated by IT/Software Development outsourcing compared to business process services. It is attributed primarily due to shortage of skilled talent that can speak fluent
- We infer Vietnam is not an ideal destination to proceed Phase-2 research

REFERENCES

- 1 <http://www.bdg-asia.com/vietnam-status-it-outsourcing-destination/>
- 2 <http://www.economist.com/blogs/johnson/2011/09/english-vietnam>
- 3 <http://www.economist.com/blogs/johnson/2011/09/english-vietnam>
- 4 <http://www.expat-blog.com/en/nationalities/malaysian/in/asia/vietnam/>
- 5 <http://www.atkearney.com/research-studies/global-services-location-index>
- 6 <http://www.forbes.com/2010/03/12/vietnam-china-labor-business-manufacturing-outsourcing-oxford.html>
- 7 <http://www.vietnamoutsourcing.org/why-vietnam/outourcing-outlook/>

Social Groups

- 1 Facebook Language Groups
- 2 LinkedIn Language Groups

Government

- 1 General Statistics Office of Vietnam [Link](#)
- 2 Vietnam Ministry of Labor [Link](#)
- 3 Vietnam Ministry of Foreign Affairs [Link](#)

Job Portals

- 1 Jobstreet
- 2 Monster
- 3 Careerbuilder
- 4 Amchenvietnam

Corporate and Academia

- 1 Can Tho University
- 2 ULIS, Vietnam National University
- 3 FPT University
- 4 Dong Nai University of Technology
- 5 Duy Tan University
- 6 Hanoi Architectural University
- 7 Hanoi University
- 8 Hanoi University of Business and Technology
- 9 Ho Chi Mihn City University of Technology and Education
- 10 Hong Duc University
- 11 Quy Nhon University
- 12 Thai Nguyen University
- 13 Samsung Electronics
- 14 Viettel
- 15 Robert Walters
- 16 Harvey Nash
- 17 USG Boral Gypsum Vietnam

Staffing Firms

- 1 Vietnam Manpower Company
- 2 Faro Recruitment
- 3 Vina Manpower
- 4 Robert Walters Vietnam
- 5 JAC Recruitment Vietnam

JAPAN

ENGLISH SPEAKING POPULATION

12%

Table 1 (Linguistic census)

Geo-region	TOKYO	KANAGAWA	OSAKA	NAGOYA	JAPAN
Population	8,949,447	3,689,603	2,666,371	2,263,907	127,650,000
Percentage of country population	7%	3%	2%	2%	
Size of region	2,187.66 km2 844.66 sq mi	2,416.04 km2 932.84 sq mi	223.00 km2 86.10 sq mi	326 km2 126.0/sq mi	377,944 km2 145,925 sq mi
Population density	6,000/km2 16,000/sq mi	3,770/km2 9,800/sq mi	80489/km2 31077/sq mi	6974/km2 2693/sq mi	337.1/km2 873.1/sq mi
Speaks -JAPANESE	8,859,953	3,652,707	2,639,707	2,241,268	126,373,500
KOREAN	63,541	26,196	18,931	16,074	900,000
FILIPINO	21,479	8,855	6,399	5,433	306,000

Table 2 (bilingual population - English plus target language)

#	ENGLISH plus...	TOKYO	KANAGAWA	OSAKA	NAGOYA	JAPAN
1	Japanese	2,596,774	828,273	481,830	359,547	4,266,424
2	Mandarin	200,655	64,005	37,230	27,780	329,670
3	Cantonese	68,571	21,871	12,723	9,494	112,659
4	Spanish	63,491	20,251	11,781	8,791	104,314
5	Portuguese	51,428	16,404	9,542	7,121	84,495
6	Vietnamese	26,666	8,506	4,948	3,692	43,812
7	Bhasha Malaysia	19,047	6,075	3,534	2,637	31,293
8	Thai	19,047	6,075	3,534	2,637	31,293
9	Korean	18,623	5,940	3,456	2,579	30,598
10	French	12,000	3,828	2,227	1,661	19,716
11	Russian	10,523	3,356	1,952	1,457	17,288
12	Turkish	9,333	2,977	1,732	1,292	15,334
13	Filipino	6,295	2,008	1,168	872	10,343
14	Swedish	3,287	1,048	610	455	5,400
15	Indonesian	3,063	977	568	424	5,032
16	Italian	2,722	868	505	377	4,472
17	Polish	2,528	806	469	350	4,153
18	Dutch	2,356	751	437	326	3,870
19	Hungarian	2,180	695	405	302	3,582
20	German	2,120	676	393	294	3,483
21	Greek	2,042	651	379	283	3,355
22	Romanian	2,016	643	374	279	3,312
23	Arabic	1,728	551	321	239	2,839
24	Hebrew	1,152	367	214	159	1,892
25	Danish	1,144	365	212	158	1,879
26	Czech	1,140	364	212	158	1,874
27	Finnish	1,107	353	205	153	1,818
28	Ukrainian	1,088	347	202	151	1,788
29	Norwegian	1,047	334	194	145	1,720
30	Serbian	1,043	333	194	144	1,714
31	Croatian	677	216	126	94	1,113
32	Slovak	456	146	85	63	750
33	Lithuanian	337	107	62	47	553
34	Estonian	191	61	35	26	313
35	Slovenian	172	55	32	24	283
36	Taiwanese Mandrian	116	37	22	16	191
37	Latvian	105	33	19	14	171
38	Bulgarian	26	8	5	4	43
39	Icelandic	15	5	3	2	25
TOTAL	3,729,342	1,189,520	691,978	516,361	5,152,864	
As a % amongst Bilingual Population	72%	23%	13%	10%		

JAPAN

OBSERVATIONS

RED

- 4% of the Japan population are bilingual English speakers
- 40% of the total English speaking bilingual population are in the cities selected for the study
- Japan made English instruction compulsory starting in the 5th grade of elementary school from the year 2011. It was a 90 hour course annually prior to this period
- Japanese students experience great difficulty in studying English, due to fundamental differences in grammar and syntax, as well as important differences in pronunciation [Link](#)
- The Japanese Ministry of Education, Culture, Sports, Science, and Technology recently has revised the national English curriculum to encourage more English speaking and to expose students to English more at a younger age.

RECOMMENDATION

RED

- Japan is not ranked in any of the research studies related to outsourcing destinations. They have their unique culture and values that generally have encouraged reticence and helped make Japanese more apprehensive and less willing to communicate in English

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- 4 http://en.wikipedia.org/wiki/English-language_education_in_Japan
- 5 <http://www.japantoday.com/category/opinions/view/why-are-japanese-so-bad-at-english>
- 6 <http://www.tofugu.com/2012/08/03/japans-other-languages/>
- 7 <https://answers.yahoo.com/question/index?qid=20090408174717AA9JXDA>
- 8 http://en.wikipedia.org/wiki/English-language_education_in_Japan
- 9 <https://www.cia.gov/library/publications/the-world-factbook/geos/ja.html>

ASSOCIATIONS & SOCIAL GROUPS

- 1 Tokyo English Language International Meetup!
- 2 Language Exchange Osaka
- 3 ESL Blog
- 4 Facebook Language Groups
- 5 LinkedIn Language Groups

Government

- 1 Ministry of Health, Labour and Welfare
- 2 Ministry of Foreign Affairs
- 3 Statistics Bureau of Japan

Job Portals

- 1 Dai Job
- 2 Careercross
- 3 Mainichi Communications Inc.
- 4 Intelligence, Ltd.
- 5 Recruit Co., Ltd.
- 6 Proseek, Inc.
- 7 Softbank Human Capital Corp
- 8 Career Design Center Co., Ltd
- 9 En-Japan Inc.
- 10 Mixi, Inc.
- 11 Create
- 12 Antique Co., Ltd.

Staffing Frims

- 1 Ranstad Japan
- 2 Bridge Group
- 3 Boyden
- 4 Talent2
- 5 Stanton Chase
- 6 Recruit Ex
- 7 Blue Steps
- 8 Morgan McKinley
- 9 Robert Leonard
- 10 Earth Stream Global
- 11 Michael Page
- 12 Manpower group

Corporate

- 1 Toyota Motor
- 2 Meitec
- 3 Nippon Telegraph & Tel
- 4 Sumitomo Mitsui Financial
- 5 Mizuho Financial
- 6 Mitsui & Co
- 7 Softbank
- 8 Itochu
- 9 Canon
- 10 Japan Tobacco

Academia

- 1 Tama University
- 2 Asia-Pacific International University
- 3 Waseda University
- 4 Meiji University
- 5 Doshisha University
- 6 Tokyo Christian University
- 7 Hiroshima Jogakuin University
- 8 Tokyo International University

TAIWAN

ENGLISH SPEAKING POPULATION

2%

Table 1 (Linguistic census)

Geo-region	NEW TAIPEI	KAOHSIUNG	TAICHUNG	TAIPEI	TAIWAN
Population	3,966,818	2,778,992	2,719,835	2,702,315	23,359,928
Percentage of country population	17%	12%	12%	12%	
Size of region	2,052.6 km2 (792.5 sq mi)	2,946.2527 km2 (1,137.55 sq mi)	2,214.8968 km2 (855.1764 sq mi)	271.7997 km2 (104.9425 sq mi)	36,193[8] km2 13,974 sq mi
Population density	1,900/km2 (5,000/sq mi)	940/km2 (2,400/sq mi)	1,200/km2 (3,200/sq mi)	15,200/km2 (5869/sq mi)	644/km2 1,664/sq mi
Speaks -TAIWANESE MANDARIN	3,927,150	2,751,202	2,692,637	2,675,292	23,126,329
TAIWANESE	2,776,773	1,945,294	1,903,885	1,891,621	16,351,950
INDONESIAN	42,623	29,860	29,224	29,036	251,000
VIETNAMESE	20,208	14,157	13,855	13,766	119,000

Table 2 (bilingual population - English plus target language)

#	ENGLISH plus...	NEW TAIPEI	KAOHSIUNG	TAICHUNG	TAIPEI	TAIWAN
1	Taiwanese Mandarin	45,695	32,012	31,330	31,129	140,166
2	Taiwanese	32,309	22,635	22,153	22,010	99,107
3	Indonesian	496	347	340	338	1,521
4	Korean	237	166	162	161	726
5	Vietnamese	235	165	161	160	721
6	Turkish	213	149	146	145	653
7	Thai	132	93	91	90	406
8	German	118	83	81	80	362
9	Dutch	62	43	42	42	189
10	Arabic	61	43	42	42	188
11	Swedish	54	38	37	37	166
12	French	50	35	34	34	153
13	Russian	42	29	29	29	129
14	Ukrainian	41	29	28	28	126
15	Spanish	34	24	23	23	104
16	Italian	34	24	23	23	104
17	Greek	31	22	21	21	95
18	Hebrew	29	20	20	20	89
19	Romanian	27	19	18	18	82
20	Bahasa Malaysia	26	18	18	17	79
21	Bulgarian	25	18	17	17	77
22	Serbian	24	17	17	17	75
23	Polish	24	17	17	17	75
24	Japanese	24	17	16	16	73
25	Icelandic	24	17	16	16	73
26	Danish	21	15	15	14	65
27	Cantonese	21	15	14	14	64
28	Norwegian	21	15	14	14	64
29	Estonian	18	13	13	12	56
30	Hungarian	18	12	12	12	54
31	Filipino	16	11	11	11	49
32	Portuguese	15	11	10	10	46
33	Slovenian	15	10	10	10	45
34	Lithuanian	14	10	9	9	42
35	Finnish	11	8	8	8	35
36	Latvian	9	6	6	6	27
37	Slovak	8	6	6	6	26
38	Czech	5	3	3	3	14
39	Croatian	5	3	3	3	14
TOTAL		80,244	56,218	55,016	54,662	246,140
As a % amongst Bilingual Population		33%	23%	22%	22%	

TAIWAN

OBSERVATIONS

RED

- Taipei ranks 73rd in best outsourcing destinations (2015) according to the research conducted by Tholan's group
- 53% of the total English speaking bilingual population are in the cities selected for the study

RECOMMENDATION

RED

- Taiwan has just started learning English and it might take 5 to 10 years for the country to develop a good number of people speaking English. The country however has a rich bilingual population speaking both Mandarin and Taiwanese.

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- 4 <https://www.iustlanded.com/english/Taiwan/Taiwan-Guide/Language/Official-languages-of-Taiwan>
- 5 http://en.wikipedia.org/wiki/Languages_of_Taiwan
- 6 <http://www.expatsblog.com/en/network/asia/taiwan/>

ASSOCIATIONS & SOCIAL GROUPS

- 1 Facebook Language Groups
- 2 LinkedIn Language Groups
- 3 Forumosa

Government

- 1 Ministry of Labor (Taiwan)
- 2 Department of Labor (Taipei)
- 3 Ministry of Foreign Affairs (Taiwan)

Job Portals

- 1 104 is the best job search engine in Taiwan.
- 2 Learn 4 Good
- 3 Career Jet
- 4 Indeed.com

Academia

- 1 National Taiwan University
- 2 National Chengchi University
- 3 Tamkang University
- 4 National Taiwan Normal University
- 5 National Sun Yat-Sen University
- 6 National Taiwan University of Science and Technology
- 7 National Taiwan Ocean University
- 8 National Chung Cheng University
- 9 Providence University
- 10 National Taipei University