



Next-wave Location Profile – Morocco

Locations Insider™ (LI)
Market Report – September 2016 – Preview Deck

Our research offerings for global services

▶ **Market Vista™**

Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

▶ **BFSI¹ Information Technology**

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▶ **Service Optimization Technologies**

▶ **Locations Insider™**

▶ **Transaction Intelligence**

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- The full report is included in the following subscription(s)
 - **Locations Insider™ (LI)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**



Corporate Headquarters

Office: +1-214-451-3000

info@everestgrp.com



European Headquarters

Office: +44-207-129-1318

unitedkingdom@everestgrp.com

¹ Banking, financial services, and insurance

Overview and methodology of the research

Overview of the research

Everest Group's Next wave location profiles provide crisp, yet insightful assessment of emerging / “next-wave” countries or cities for services delivery. These reports help global sourcing practitioners or location strategy professionals stay ahead of competition in understanding global sourcing opportunities in “next-wave” locations.

These reports offer perspectives on:

- Global sourcing profile (e.g., functions supported, market activity) of the location
- Opportunities for enterprises and service providers
- Key drivers and challenges for global sourcing industry
- Overview of talent availability and operating costs (including wage inflation and attrition)
- Key environment risks (e.g., geopolitical, macroeconomic, safety)

The methodology of these reports includes:

- Proprietary tracking and databases on operating costs, labor pool, market activity, and risks
- Year-round tracking of 180+ locations around the world
- Coverage across all offshore, nearshore, and onshore locations across regions (APAC, Europe, North America, LATAM, Africa)
- Over 100 global projects on supporting clients on location decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

This study provides perspectives on key aspects of the global sourcing market in the location; below are four charts to illustrate the coverage of the report

ILLUSTRATIVE

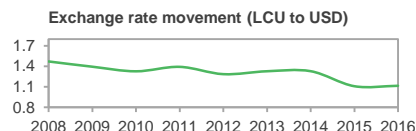
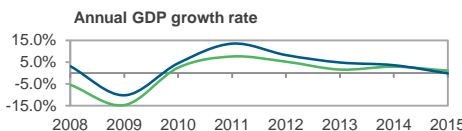
Country/city overview and market activity

Key factoids – geographic and socio-economic

Region	XX
Time zone	XX
Government type	XX
Population (XX)	XX
GDP	XX
GDP per capita	XX
Currency	XX
Corporate tax rate	XX
CPI inflation	XX
Major languages spoken (XXX)	XX
Economic development Agency	XX



— GDP growth (%)
— GDP (PPP) growth (%)



Growth drivers, opportunities, and challenges

Relative maturity of functions served

- Contact center services dominate the landscape, based on FTE count
- XXX
- XXX
- XXX
- XXX
- XXX

Potential opportunities

- Ability to act as a multi-lingual customer service center with potential to support operations in Arabic, French and Spanish, plus limited scale in English
- XXX
- XXX
- XXX

Drivers for industry growth

- Availability of highly skilled multi-lingual tertiary graduate pool
- Significant cost saving potential over Western Europe and the Scandinavian locations
- XXX
- XXX

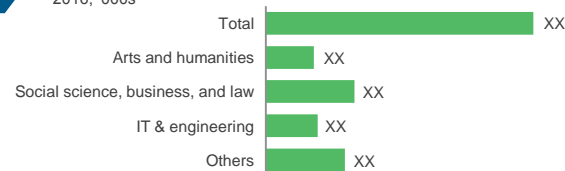
Likely challenges

- Scalability limitations due to small talent pool
- XXX
- XXX
- XXX
- XXX
- XXX

Talent availability and operating cost

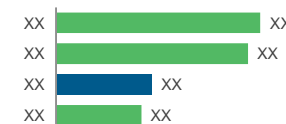
Entry-level talent pool

Annual tertiary graduate pool 2016; '000s

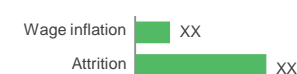


Operating cost

Annual operating cost per FTE – BP (F&A) 2016; US\$ '000s



Wage inflation and attrition (IT ADM) 2016; Percentage per annum



Risk assessment

Highly favorable Favorable, some concerns Least favorable

Parameter	Everest Group rating	Comments
Geopolitical	Highly favorable	<ul style="list-style-type: none"> • Low risks associated with domestic political stability • XXX • XXX
Macro-economic	Favorable, some concerns	<ul style="list-style-type: none"> • Domestic demand to drive growth during 2016-2017; potential risks with external trading partners such as Russia, Ukraine, and Finland • XXX
Infrastructure	Favorable, some concerns	<ul style="list-style-type: none"> • Good availability of ICT infrastructure for shared services, comparable to other leading European locations • XXX • XXX
Safety and security	Highly favorable	<ul style="list-style-type: none"> • Concerns due to potential cyber attacks from Russia prompting the country to set up a remote data center for government records; however, security issues are not a concern for companies • XXX
Regulations and ease of doing business	Favorable, some concerns	<ul style="list-style-type: none"> • The country was ranked 16th (out of 189) in 2016 by the World Bank for ease of doing business and 29th (out of 140) by WEF in Global Competitiveness for 2015-2016 • XXX

Source: Everest Group (2016)

Locations Insider research calendar

Published Current

Topic

Release date

Many Voices, Many Locations: Understanding the Multi-lingual Contact Center Market in East and Southeast Asia	April 2016
"Next-wave" location profiles: Dalian, China	May 2016
"Next-wave" location profiles: Iasi, Romania	June 2016
Global Hotspots For Digital Services	June 2016
IT Services Delivery from Latin America (LATAM)	June 2016
"Next-wave" location profiles: Dominican Republic	July 2016
"Next-wave" location profiles: Jordan	July 2016
"Next-wave" location profiles: Estonia	August 2016
Innovation Beyond Borders – Global Talent Hotspots for Engineering Services and Research & Development (ER&D)	August 2016
Banking middle- and back-office services delivery from Nearshore Europe	September 2016
"Next-wave" location profiles: Cape Town, South Africa	September 2016
"Next-wave" location profiles: Chandigarh, India	September 2016
"Next-wave" location profiles: Morocco	September 2016
Emerging Locations Trends Report: Analytics delivery hotspots	Q3 2016
Delivery of IT services from U.S.	Q3 2016
Global Locations Annual Report	Q3 2016
"Next-wave" location profiles: Kiev, Ukraine	Q4 2016

Additional research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details, or complementary content that may be of interest:

1. **“Next-wave” Location Profile – Cape Town** ([EGR-2016-2-LP-1923](#)); 2016. This report analyzes Cape Town, Africa and offers perspectives on global sourcing profile of Cape Town, key opportunities, drivers, and challenges, along with an overview of talent availability, operating costs, and environment risks
2. **“Next-wave” Location Profile – Jordan** ([EGR-2016-2-LP-1827](#)); 2016. This report analyzes Jordan and offers perspectives on global sourcing profile of Jordan, key opportunities, drivers, and challenges, along with an overview of talent availability, operating costs, and environment risks
3. **“Next-wave” Location Profile – Mauritius** ([EGR-2016-2-R-1722](#)); 2016. This report analyzes Mauritius and offers perspectives on global sourcing profile of Mauritius, key opportunities, drivers, and challenges, along with an overview of talent availability, operating costs, and environment risks
4. **Global Locations Annual Report 2015: Resurgence of Activity Amidst Evolving Propositions** ([EGR-2015-2-R-1619](#)); 2015. This report is a unique and comprehensive guide to understanding the nuances of the global services locations landscape and interpreting locations-related developments and trends in order to frame locations strategy. It presents insights into the size and growth of the global services market, global services exports by regions & country, update of locations activity by region & country, and trends affecting global locations (changes in investment environment and exposure to various risks). It also provides industry-leading comparison and analysis of key movements in maturity, arbitrage, and potential of global delivery locations (cities) through our unique MAP Matrix™ analysis

For more information on this and other researches published by Everest Group, please contact us:

Anurag Srivastava, Vice President – Global Sourcing:

anurag.srivastava@everestgrp.com

Gargi Verma, Locations Specialist – Global Sourcing:

gargi.verma@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com and research.everestgrp.com.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-647-557-3475

London

unitedkingdom@everestgrp.com
+44-207-129-1318

Delhi

india@everestgrp.com
+91-124-284-1000

Stay connected

Websites

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