



“Next-wave” Location Profile – Cork, Ireland

Locations Insider™ (LI)

Market Report: August 2017 – Complimentary Abstract / Table of Contents

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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
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* Banking, financial services, and insurance

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



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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 key dimensions that impact a location's relative attractiveness, including:

- Key drivers, challenges and untapped opportunities for global sourcing industry
- Talent and skills availability (at both entry and experienced levels)
- Depth and maturity across functions
- Financial attractiveness (including wage inflation and attrition)
- Delivery presence of enterprises and service providers
- Key languages supported
- Key environment risks (e.g., macroeconomic, geopolitical, infrastructure, safety and security, legal and regulatory)

The methodology of these reports includes:

- Proprietary tracking and databases on operating costs, labor pool, market activity, and risks
- Year-round tracking of 200+ locations around the world
- Coverage across all offshore, nearshore, and onshore locations across regions (APAC, Europe, North America, Latin America, Africa)
- Over 120 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

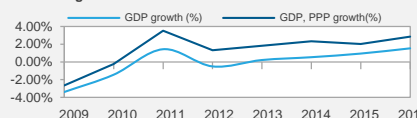
Country/City | Overview

Geographic and socio-economic indicators

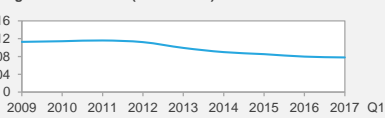
Region	XX
Time zone	XX
Government type	XX
Population	XX
GDP	XX
GDP per capita	XX
Currency	XX
Corporate tax rate	XX
CPI inflation	XX
Major languages spoken	XX
Economic development agency	XX

Economic Indicators

Annual GDP growth rate



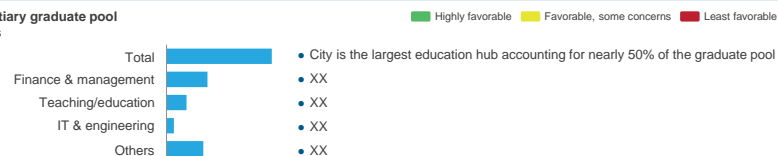
Exchange rate movement (LCU to USD)



Country/City | Talent and cost overview (page 1 of 2)

Entry-level talent pool

Annual tertiary graduate pool 2017; '000s



Functions supported

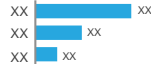
Functions	Maturity
Contact center	XX
Non-voice BP	XX
IT-ADM	XX
IT Infrastructure	XX
Digital	XX

- Contact center services such as customer care, receivables management, technical helpdesk, and outbound sales dominate the city offshore delivery landscape

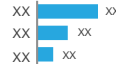
Country/City | Talent and cost overview (page 2 of 2)

Operating cost

Annual operating cost per FTE-BP (F&A)^{1,2} 2017; USD '000s



Annual operating cost per FTE-CC^{1,2} 2017; USD '000s



- City offers significant cost arbitrage over U.S. locations, and is amongst the most attractive nearshore locations from a cost perspective
- XX

Wage inflation and attrition

Wage inflation and attrition (CC) 2017; Percentage per annum



- Moderate wage inflation and attrition
- XX

Language skills

- XX
- XX

Country/City | Risk profile

Parameter Everest Group rating Comments

Geopolitical	XX	<ul style="list-style-type: none"> • City has witnessed a stable political climate over the past few years, with both major political parties exhibiting a positive stance towards the industry • XX • XX • XX • XX
Macroeconomic	XX	<ul style="list-style-type: none"> • City administration continues to meet its fiscal targets under the IMF loan accord, thus enabling further credit from the IMF and other multilateral lenders • XX • XX • XX • XX • XX • XX • XX
Infrastructure	XX	<ul style="list-style-type: none"> • City has built a strong optical fiber communication network around the country • XX • XX • XX

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. **Global Locations Annual Report 2017: Signs of Structure in a Disordered World** ([EGR-2017-2-R-2234](#)); 2017. 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
2. **Impact of Brexit on the UK Contact Center Market – The Only Thing Certain is Uncertainty** ([EGR-2017-2-V-2285](#)); 2017. The Brexit referendum, initiated in June 2016, saw the population of the United Kingdom voting to exit the European Union. With several concerns raised by businesses in the aftermath, the contact center industry also found itself facing key questions related to impact on the business and future investment plans in the United Kingdom and nearshore locations serving the location. This report discusses the impact of Brexit on the UK contact center market
3. **Emergence of Western Europe for Centralized Global Service Delivery to Europe** ([EGR-2017-2-R-2266](#)); 2017. Over the last few years, Western Europe has gained significant importance as a global/regional delivery geography. Western European locations offer a unique value proposition with availability of skilled-talent, stable business/operating environment, multi-lingual capabilities, and high maturity for certain services. This report provides a detailed assessment of location options within Western Europe for global service delivery
4. **Talent Model and Location Hotspots for Service Delivery Automation (SDA) Center of Excellence (CoE)** ([EGR-2017-2-R-2283](#)); 2017. Global services industry has witnessed a rapid surge in automation efforts as a lever to reduce costs. Increasing adoption of automation is making companies revamp their hiring strategy as Service Delivery Automation (SDA) requires specialized skills, which are not readily available. This report provides an up close view of the type of talent required, hiring strategy, and global locations landscape for SDA CoE. It also assesses the comparative value proposition of leading locations currently being leveraged for SDA services delivery

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Locations Insider research calendar

■ Published ■ Planned □ Current release

Flagship Locations Insider reports

Release date

"Next-wave" location profiles: Pune, India	June 2017
Global Locations Annual Report 2017: Signs of Structure in a Disordered World	June 2017
"Next-wave" location profiles: Kuala Lumpur, Malaysia	August 2017
"Next-wave" location profiles: Cork, Ireland	August 2017
"Next-wave" location profiles: Delhi, India	Q3 2017
"Next-wave" location profiles: Iloilo, Philippines	Q3 2017
"Next-wave" location profiles: Krakow, Poland	Q3 2017
"Next-wave" location profiles: Penang, Malaysia	Q3 2017

Thematic Locations Insider reports

The Philippines IT-BPM Industry: Cautious Optimism in Turbulent Times	March 2017
IT Services Delivery from Asia Pacific	April 2017
Emergence of Western Europe for Centralized Service Delivery to Europe	July 2017
Reimagining Location Strategy Due to Increasing Agile/DevOps Adoption	July 2017
Impact of Brexit on Contact Center Landscape in UK & Ireland	July 2017
Talent Model and Location Hotspots for Service Delivery Automation (SDA) Center of Excellence (CoE)	July 2017
Landscape of Locations Delivering Business Process Services To the UK & Ireland	Q3 2017
Poland Tier-2 Cities: Diverse Value Propositions For Service Delivery	Q3 2017



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 empower 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.

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