



Next-wave Location Profile

Locations Insider™
Market Report: August 2015 – 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

▶ BFSI¹ Business Process

▶ Healthcare & Life Sciences

▶ Application & Digital

▶ Cloud & Infrastructure

▶ Global Sourcing

▶ Locations Insider™

▶ PricePoint™

▶ Finance & Accounting

▶ Procurement

▶ Human Resources

▶ Recruitment Process

▶ Contact Center

▶ 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)
 - **Location Insider™**
- 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**



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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

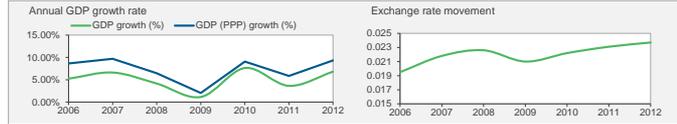
Country/city overview and market activity

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



Economic indicators



Growth drivers, opportunities, and challenges

Relative maturity of functions served

- Primarily leveraged for English-language contact center services delivery to the United States
- Multiple instances of both GICs and service providers providing transactional back-office services
- XXX

Potential opportunities

- Availability of high-quality graduates can drive the growth of the Knowledge Process Outsourcing (KPO) industry
- XXX
- XXX
- XXX
- XXX

Drivers for industry growth

- Cultural affinity with the United States and high proficiency in American-style English
- Attractive cost arbitrage over U.S. cities
- XXX
- XXX
- XXX

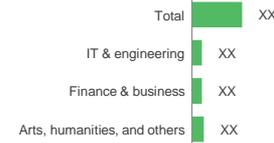
Likely challenges

- Global branding as voice BP leader presents a challenge for the visibility and growth of non-voice BP
- XXX
- XXX
- XXX

Talent availability and operating cost

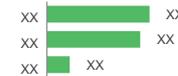
Entry-level talent pool

Annual tertiary graduate pool
2014; '000s



Operating cost

Annual operating cost per FTE – contact center
2014; US\$ '000s



Wage inflation and attrition (CC)
2014; Percentage per annum



Risk assessment

Highly favorable (green), Favorable, some concerns (yellow), Least favorable (red)

Parameter	Everest Group rating	Comments
Geopolitical ¹	Highly favorable	
Macro-economic ¹	Favorable, some concerns	
Infrastructure	Favorable, some concerns	
Safety and security	Favorable, some concerns	
Regulations and ease of doing business ¹	Favorable, some concerns	

Source: Everest Group (2015)

LI research calendar

Published
 Current

Topic	Release date
Putting Egypt Back on Your Location Radar – The View from the Frontline of Operations	March 2015
Cultural Affinity, Cost Savings, Coordinates – 3 C's of Targeting UK Contact Center Market	March 2015
Next-wave Location Profile – Kochi, India	March 2015
Nearshore Europe Is IT! IT Services Riding The Nearshore Advantage	April 2015
Next-wave Location Profile – Penang, Malaysia	April 2015
North America Domestic Outsourcing Services: Providers Embrace Onshoring – Is the World Still Flat?	May 2015
Ukraine Crisis: Is the Regional IT Service Delivery Landscape Changing?	June 2015
"Next-wave" location profiles: Lithuania	July 2015
Value Proposition of Tier-2/3 Cities for Global Services Delivery	July 2015
"Next-wave" location profiles: Lodz, Poland	July 2015
"Next-wave" location profiles: Puerto Rico	August 2015
"Next-wave" location profiles: Brno, Czech Republic	Q3 2015
"Next-wave" location profiles: Curitiba, Brazil	Q3 2015
Annual Locations Webinar: Focus topic TBD	Q3 2015
Global Locations Annual Report	Q3 2015
Emerging Locations Trends report: SMAC delivery hotspots	Q3 2015
"Next-wave" location profiles: El Salvador	Q4 2015
"Next-wave" location profiles: Tunisia	Q4 2015

Additional research references

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

1. **Next-wave Location Profile – Guatemala** ([EGR-2013-2-LP-0998](#)); 2013. This report offers perspectives on global sourcing profile of Guatemala, key opportunities, drivers, and challenges, along with an overview of talent availability, operating costs, and environment risks
2. **North America Domestic Outsourcing Services: Providers Embrace Onshoring – Is the World Still Flat?** ([EGR-2015-2-R-1455](#)); 2015. This report analyzes key trends in domestic outsourcing market in the U.S. and Canada, looking at variations by location type across different functions, type of service provider, and other factors. The analysis includes over 670 delivery centers representing more than 50 leading service providers across IT, business process, and contact center, in approximately 300 cities
3. **Central America and the Caribbean Answer the Call for English-language Contact Center Services** ([EGR-2014-2-R-1297](#)); 2014. Central America and the Caribbean are witnessing growing interest as delivery destinations for global contact center services. This report provides an assessment across key location selection dimensions and provides a risk-reward framework, comparing the value proposition of the various location options in the geography

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

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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.

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