Everest Group
RESEARCH

Next-wave Location Profile

Locations Insider™
Market Report: July 2014 – Preview Deck

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EGR-2014-2-PD-1149

Our research offerings for global services

Subscription information

- The full report is included in the following subscription(s)
  - **Locations 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:

Corporate Headquarters
Office: +1-214-451-3000
info@everestgrp.com

European Headquarters
Office: +44-207-129-1318
unitedkingdom@everestgrp.com

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

BFSI[1] information technology	PricePoint™
BFSI[1] business process	Finance & accounting
Healthcare information technology	Procurement
Information technology	Human resources
Cloud Vista™	Recruitment process
Global sourcing	Contact center
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

1 Banking, financial services, and insurance

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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:

- 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

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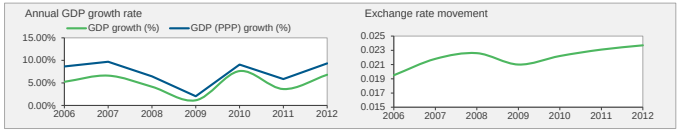
This study provides perspectives on key aspects of the global sourcing market in the location; below are four charts to illustrate the coverage of the report

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



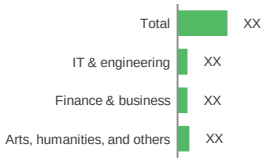
Economic indicators



Talent availability and operating cost

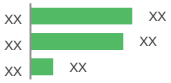
Entry-level talent pool

Annual tertiary graduate pool
2013; '000s



Operating cost

Annual operating cost per FTE – contact center
2013; US$ '000s



Wage inflation and attrition (CC)
2013; Percentage per annum



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

Risk assessment

Highly favorable | Favorable, some concerns | Least favorable

Parameter	Everest Group rating	Comments
Geopolitical[1]		• Stable government; ruling party has control of both houses of parliament • Concerns around high incidence of corruption across all levels of government
Macro-economic[1]		• Healthy GDP growth driven by strong private sector consumption and net exports • XXX • XXX
Infrastructure		• Good-quality infrastructure in business and IT parks in the city • XXX
Safety and security		• Security risk is moderate with relatively lower levels of violence, compared to other parts of the XXX • XXX
Regulations and ease of doing business[1]		• Some concerns around ease of doing business, with higher time required to start a business • XXX • XXX

Source: Everest Group (2014)

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Location Insider research calendar

Published Current

Topic	Release date
"Next-wave" location profile: Guatemala	November-2013
"Next-wave" location profile: Cebu	November-2013
Finance & Accounting in Latin America (LATAM)	December-2013
"Next-wave" location profile: Peru	June-2014
"Next-wave" location profile: Bulgaria	June-2014
"Next-wave" location profiles: Chengdu, China	July-2014
Global Locations Annual Report	Q2-2014
Emerging Locations Trends report: Delivery of IT services from the U.S.	Q2-2014
"Next-wave" location profile: Latvia	Q2-2014
Function Focus: Tier-2/3 locations in India for IT ADM delivery	Q3-2014
Emerging Locations Trends report: Emerging opportunities in tier-2/3 cities in the Philippines	Q3-2014
"Next-wave" location profiles: Kenya	Q3-2014
"Next-wave" location profiles: Sri Lanka	Q3-2014
"Next-wave" location profiles: Nicaragua	Q3-2014
"Next-wave" location profiles: Romania	Q3-2014

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Appendix: 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 – Cebu, Philippines** (EGR-2013-2-LP-0999); 2013. This report analyses Cebu (Philippines) offers perspectives on global sourcing profile of Cebu, key opportunities, drivers, and challenges, along with an overview of talent availability, operating costs, and environment risks

2. **Next-wave Location Profile – Guatemala** (EGR-2013-2-LP-0998); 2013. This report on Guatemala offers perspectives on global sourcing profile of Cebu, key opportunities, drivers, and challenges, along with an overview of talent availability, operating costs, and environment risks

3. **Finance & Accounting in Latin America (LATAM)** (EGR-2013-2-R-1009); 2013. This report analyzes LATAM as a destination for nearshore/offshore FAO services in English language and the region's unique value proposition. The report would help buyers and service providers, who are evaluating entering or expanding their existing footprint in LATAM, to develop a holistic perspective of global services in FAO

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

Anurag Srivastava, Practice Director – Global Sourcing: anurag.srivastava@everestgrp.com
Mansi Mahajan, Senior Analyst – Global Sourcing: mansi.mahajan@everestgrp.com

Everest Group
Two Galleria Tower
13455 Noel Road, Suite 2100
Dallas, TX 75240

Phone: +1-214-451-3110
E-mail: info@everestgrp.com

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Everest Group

From **insight** to ***action***.



At a glance

- With a fact-based approach driving outcomes, Everest Group counsels organizations with complex challenges related to the use and delivery of the next generation of global services
- Through its practical consulting, original research, and industry resource services, Everest Group helps clients maximize value from delivery strategies, talent and sourcing models, technologies, and management approaches
- Established in 1991, Everest Group serves users of global services, providers of services, country organizations, and private equity firms in six continents across all industry categories

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

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