

Locations Insider™ (LI)

Market Report – June 2017 – 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

▶ Application Services

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▶ Digital Services

▶ Engineering Services

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▶ Human Resources

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▶ ITS | Healthcare & Life Sciences

▶ IT Services Forecaster™

▶ Locations Insider™

▶ PricePoint™

▶ Procurement

▶ Recruitment & Talent Acquisition

▶ Service Optimization Technologies

▶ 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

- This 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



Delhi Office

Office: +91-124-284-1000

india@everestgrp.com

* 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 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

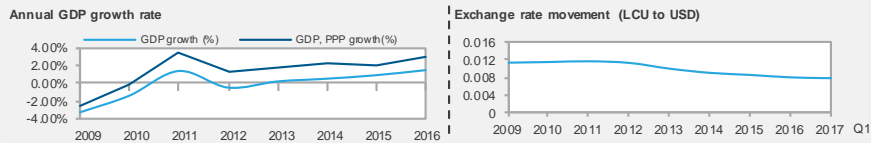
This study provides perspectives on key aspects of the global sourcing market in the location; below are four charts to illustrate the coverage of the report

Country/City | Overview

Geographic and socio-economic indicators

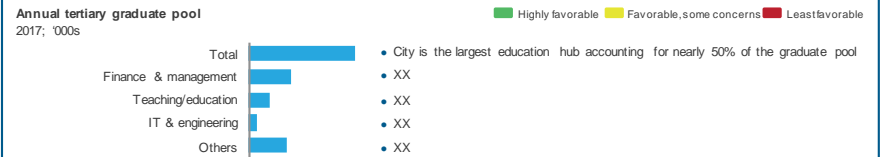
Region	XX
Time zone	XX
Government type	XX
Population	XX
GDP	XX
GDP per capita	XX
Currency	XX
Corporate tax rate	XX
CPI inflation	XX
Major languages spoken	XX
Economic development agency	XX

Economic Indicators



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

Entry-level talent pool

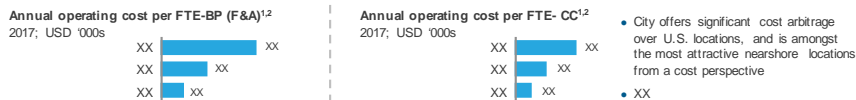


Functions supported

Functions	Maturity	
Contact center	Highly favorable	• Contact center services such as customer care, receivables management, technical helpdesk, and outbound sales dominate the city offshore delivery landscape
Non-voice BP	Highly favorable	• XX
IT-ADM	Highly favorable	• XX
IT Infrastructure	Highly favorable	• XX
Digital	Highly favorable	• XX

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

Operating cost



Wage inflation and attrition



Language skills

- XX
- XX

Country/City | Risk profile

Parameter	Everest Group rating	Comments
Geopolitical	Favorable, some concerns	<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	Favorable, some concerns	<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	Favorable, some concerns	<ul style="list-style-type: none"> City has built a strong optical fiber communication network around the country XX XX XX

Locations Insider research calendar

Published Current

Topic	Release date
Global Locations Annual Report	October 2016
“Next-wave” Location Profiles – Kiev, Ukraine	November 2016
Argentina Global Services Industry – Breaking Political Shackles?	January 2017
Determining Scalability Potential of a Location – Not as Easy as It Seems!!	January 2017
“Next-wave” Location Profiles – Belo Horizonte, Brazil	March 2017
The Road Ahead After Brexit: A Global Services Perspective on the Impact of the Change	March 2017
The Philippines IT-BPM Industry: Cautious Optimism in Turbulent Times	March 2017
“Next-wave” Location Profiles – Cavite, the Philippines	March 2017
IT services delivery from Asia Pacific	April 2017
“Next-wave” Location Profile – Jamaica	June 2017
Emergence of Western Europe for centralized service delivery to Europe	Q2 2017
“Next-wave” Location Profiles – Bangladesh	Q2 2017
Implications of automation on talent requirements and talent hotspots for automation CoEs	Q2 2017
Impact of Brexit on contact center landscape in UK & Ireland	Q2 2017
“Next-wave” Location Profiles – Pune, India	Q2 2017
“Next-wave” Location Profiles – Cork, Ireland	Q2 2017
Global Locations Annual Report	Q2 2017

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 – Dominican Republic** ([EGR-2016-2-LP-1826](#)); 2016. This report analyzes Dominican Republic and offers perspectives on global sourcing profile of Dominican Republic, key opportunities, drivers, and challenges, along with an overview of talent availability, operating costs, and environment risks
2. **IT Services Delivery from Latin America (LATAM)** ([EGR-2016-2-R-1803](#)); 2016. This report analyzes Latin America as a destination for delivery of nearshore/offshore IT services. It provides an in-depth assessment of the ten key cities in the region, focusing on labor pool, operating cost, market activity, and risk analysis. It also provides information on opportunity and challenges offered by Latin America for delivery of IT services
3. **The Philippines IT-BPM Industry: Cautious Optimism in Turbulent Times** ([EGR-2017-2-V-2117](#)); 2017. This viewpoint examines the facts concerning the recent geopolitical changes in the Philippines and presents Everest Group’s perspectives on its impact on Philippines IT-BPM industry. The viewpoint highlights steps global companies and industry associations in the Philippines can undertake to mitigate potential concerns. The viewpoint also examines if the current situation might be beneficial for the Philippines IT-BPM industry in the long run.

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

Rohitashwa Aggarwal, Practice Director:

rohitashwa.aggarwal@everestgrp.com

Parul Jain, Senior Analyst:

parul.jain@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 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.

Dallas (Headquarters)

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

Bangalore

india@everestgrp.com
+91-804-276-4533

Delhi

india@everestgrp.com
+91-124-496-1000

London

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

New York

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

Toronto

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

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Website



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@EverestGroup



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