



“Next-wave” Location Profile – Belfast, Northern Ireland

Locations Insider™ (LI)

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

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

▶ BPS | Banking Financial Services

▶ BPS | Healthcare & Life Sciences

▶ BPS | Insurance

▶ Catalyst™

▶ Cloud & Infrastructure

▶ Contact Center

▶ Digital Services

▶ Engineering Services

▶ Finance & Accounting

▶ Human Resources

▶ ITS | BFSI*

▶ 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

- 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**

* Banking, financial services, and insurance



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

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

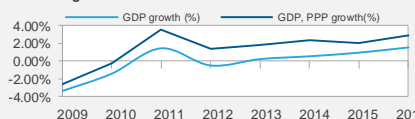
Country/City | Overview

Geographic and socio-economic indicators

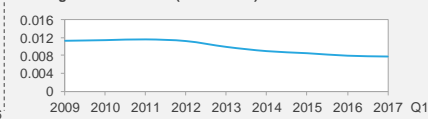
Region	XX
Time zone	XX
Government type	XX
Population	XX
GDP	XX
GDP per capita	XX
Currency	XX
Corporate tax rate	XX
CPI inflation	XX
Major languages spoken	XX
Economic development agency	XX

Economic Indicators

Annual GDP growth rate



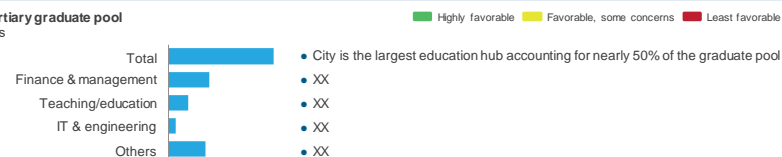
Exchange rate movement (LCU to USD)



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

Entry-level talent pool

Annual tertiary graduate pool 2017; '000s



Functions supported

Functions

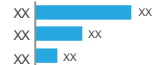
Maturity

Contact center	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	Favorable, some concerns	• XX
IT-ADM	Favorable, some concerns	• XX
IT Infrastructure	Favorable, some concerns	• XX
Digital	Favorable, some concerns	• XX

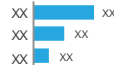
Country/City | Talent and cost overview (page 2 of 2)

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



- 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



- 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



- City has built a strong optical fiber communication network around the country
- XX
- XX
- XX

Research calendar – Locations Insider

Published
 Planned
 Current release

Flagship Locations Insider reports

Release date

Global Locations Annual Report 2017: Signs of Structure in a Disordered World	June 2017
"Next-wave" Location Profile – Iloilo, Philippines	September 2017
"Next-wave" Location Profiles – Krakow, Poland	October 2017
"Next-wave" Location Profiles – Belfast, Northern Ireland	October 2017
"Next-wave" Location Profiles – Monterrey, Mexico	Q4 2017
"Next-wave" Location Profiles – Medellin, Colombia	Q4 2017
"Next-wave" Location Profiles – Guangzhou, China.....	Q4 2017
"Next-wave" Location Profiles – Timisoara, Romania	Q4 2017

Thematic Locations Insider reports

Talent Model and Location Hotspots for Service Delivery Automation (SDA) Center of Excellence (CoE).....	July 2017
EU GDPR: Is There a Silver Lining to the Disruption?	September 2017
Changing the Contact Center Delivery Model to Target Customer Experience.....	October 2017
What is the True Maturity of Indian Contact Center Market?	Q4 2017
Brexit, GDPR, and Digital Winds of Change: Disruption or Transformation of Service Delivery to the UK and Ireland?.....	Q4 2017
Poland Tier-2/3 Cities: Diverse Value Propositions For Service Delivery	Q4 2017
Betting on the Future – The Bangladesh IT-ITeS Industry is Poised for Growth.....	Q4 2017
Growth in FinTech/Blockchain Markets and Implications on Talent and Locations.....	Q4 2017

Note: For a list of all Locations Insider™ reports published by us, please refer to our [website page](#)

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

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

Anurag Srivastava, Vice President:
Parul Jain, Senior Analyst – Global Sourcing:
Akshay Pandita, Senior Analyst – Global Sourcing:
Global Sourcing Team:

anurag.srivastava@everestgrp.com
Parul.Jain@everestgrp.com
Akshay.Pandita@everestgrp.com
gsresearch@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

+1-416-388-6765

Stay connected

Website



www.everestgrp.com

Social Media



@EverestGroup



@Everest Group

Blog

[Sherpas In Blue Shirts](http://www.sherpasinblueshirts.com)

www.sherpasinblueshirts.com