

Global Locations State of the Market 2021: Embracing Uncertainties in a Disrupted World | Risk Watch

March 2021: Complimentary Abstract / Table of Contents



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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

Contents

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Surbhi Gupta, Senior Analyst

Sauban Nafees, Assistant Manager

1. Introduction and overview	4
• Research methodology	5
• Key dimensions of assessment	6
• Methodology and key inclusions	7
• Summary of key messages	8
2. Risk watch	9
• Asia Pacific (APAC)	
– Risk dashboard	10
– Key risks to watch out for and major developments	12
• Americas	
– Risk dashboard	14
– Key risks to watch out for and major developments	17
• Europe, Middle East, and Africa (EMEA)	
– Risk dashboard	20
– Key risks to watch out for and major developments	24
3. Appendix	28
• Exchange rates	29
• Glossary	32
• Research calendar	33

Overview and abbreviated summary of key messages

Global Locations State of the Market 2021: Risk Watch provides a comprehensive view of the operating and business environment in the major delivery locations globally. The report includes risk ratings across seven primary parameters of risk assessment and details on location-specific recent risks and developments

Some of the findings in this report, among others, are:

Risk Watch

- At an overall level, APAC offers safe and secure environment with relatively high macroeconomic stability. Singapore, Hong Kong, Taiwan, and South Korea are the most attractive locations within the region; these locations are characterized by high quality of infrastructure, stable economy, high safety & security, and quality of life
- Americas offer a high quality of life, however, there are some concerns, primarily in Central and South America, in areas such as regulatory environment, digital readiness, and quality of infrastructure. Canada, Chile, and the United States offer the most favorable conditions for businesses, given the high quality of infrastructure and stable political & macroeconomic environment
- Locations in EMEA offer high-quality infrastructure, high quality of life, and a safe and secure business environment. Countries such as Germany, the United Kingdom, Estonia, and the Czech Republic are among the leading locations offering low risk across all parameters

This study offers three distinct chapters providing a deep dive into key aspects of global location risks; below are three charts to illustrate the depth of the report

Key dimensions of assessment

The **Risk watch** section provides a comprehensive view of the operating and business environment in the major delivery locations globally, along with select source geographies. The section includes an analysis of the following dimensions:

Risk dashboard

- A snapshot of the operating and business environment at different locations in a region
- It includes risk ratings across seven primary parameters of assessment
- It also covers important occurrences in the past one year that are likely to impact service providers / buyers, or are worth watching out for
- The assessment captures both positive and negative movements in the risk ratings of the locations based on these events

Key risks to watch out for and major developments

This section includes details on location-specific risks and developments that service providers / buyers need to keep in mind

Risk dashboard

↑ Increased risk from last year ↓ Reduced risk from last year ■ Highly favorable ■ Favorable, with some concerns ■ Significant challenges

Country (city)	Quality of infrastructure	Safety and security	Geopolitical	Macroeconomic	Regulations & ease of doing business	Digital readiness	Quality of life	Overall risk
Country 1	■	■	■ ↑	■	■	■	■	■
Country 2	■	■	■	■	■	■	■	■
Country	■	■	■	■ ↓	■	■	■	■
Country 4	■	■	■	■	■ ↑	■	■	■
Country 5	■	■ ↑	■	■	■	■	■	■
Country 6	■	■	■	■	■	■	■	■
Country 7	■	■	■	■	■	■	■	■

Methodology and key inclusion

Infrastructure quality	Geopolitical stability	Macroeconomic stability	Regulations and ease of doing business	Safety and security	Digital readiness	Quality of life
<ul style="list-style-type: none">• Quality of overall infrastructure• Quality of telecom infrastructure• Availability of IT/BP real estate• Quality of power infrastructure	<ul style="list-style-type: none">• Risk of political instability• Threat of external intervention• State of democracy• Corruption levels	<ul style="list-style-type: none">• Overall macroeconomic stability• Financial risk• Country debt risk	<ul style="list-style-type: none">• Overall legal and regulatory risk• Strength of IP protection laws• Ease of doing business• Stringency of labor laws	<ul style="list-style-type: none">• Security risk• Threat of disruption from natural disasters• Business costs of crime and violence	<ul style="list-style-type: none">• Cybersecurity risk• Data security risk• Adoption of digital services• Quality of technology infrastructure• Level of innovation	<ul style="list-style-type: none">• Nutrition levels and life expectancy• Access to essential & quality medical care• Literacy rates and school enrollments• Access to advanced education• Environment quality and air pollution

Research calendar

Locations Insider™

Published Planned Current release

Flagship Locations Insider reports

Release date

Location Spotlight – San Antonio, Texas, The United States	October 2020
Location Spotlight – Birmingham, The United Kingdom	December 2020
Location Spotlight – Nigeria	November 2020
Location Spotlight – Raleigh, The United States	December 2020
Location Spotlight – Coimbatore, India	January 2021
Location Spotlight – Lithuania	March 2021
Location Spotlight – Cali, Colombia	March 2021
Location Spotlight – Hungary	March 2021
Global Locations State of the Market 2021: Embracing Uncertainties in a Disrupted World Risk Watch	March 2021
Global Locations State of the Market 2021 Key Trends Shaping the Landscape	Q2 2021
Global Locations State of the Market 2021 Locations PEAK Matrix	Q2 2021

Thematic Locations Insider reports

Release date

Africa: Emerging IT-BP Delivery Force	July 2020
Leading European Locations for Global Delivery of Engineering Services	October 2020
Data & Analytics Handbook – Delivery Location Strategy to Steer Through Digital Disruption	November 2020
Leading LATAM Locations for Global Services Delivery	Q1 2021

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Dallas (Headquarters)

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

Bangalore

india@everestgrp.com
+91-80-61463500

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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