

# Enterprise Acquisition Guide for Hot IT Roles

April 2022: Complimentary Abstract / Table of Contents



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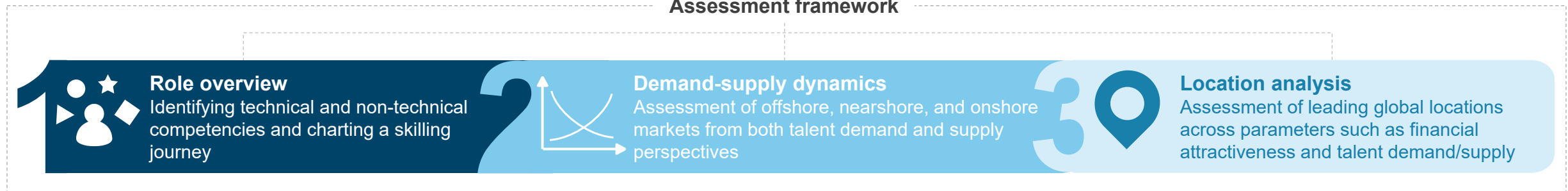
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## Background and objective

As the world struggles with the next normal following the pandemic, it is apparent that technology will be vital to ensuring businesses' future resilience. Technology services have become critical for enterprises to achieve the triple mandate of cost optimization, operational excellence, and business value creation. While enterprises experiment with and increase IT adoption to create a competitive advantage, the fierce competition for niche IT roles continues to intensify. In fact, the IT roles of tomorrow will keep evolving amid the unabated wave of change.

**This Everest Group report helps enterprises identify the right skill sets and locations to support two in-demand IT roles – full-stack developers and cloud architects. It highlights the relative attractiveness of leading global locations for these niche IT roles based on a comprehensive assessment along three broad dimensions:**

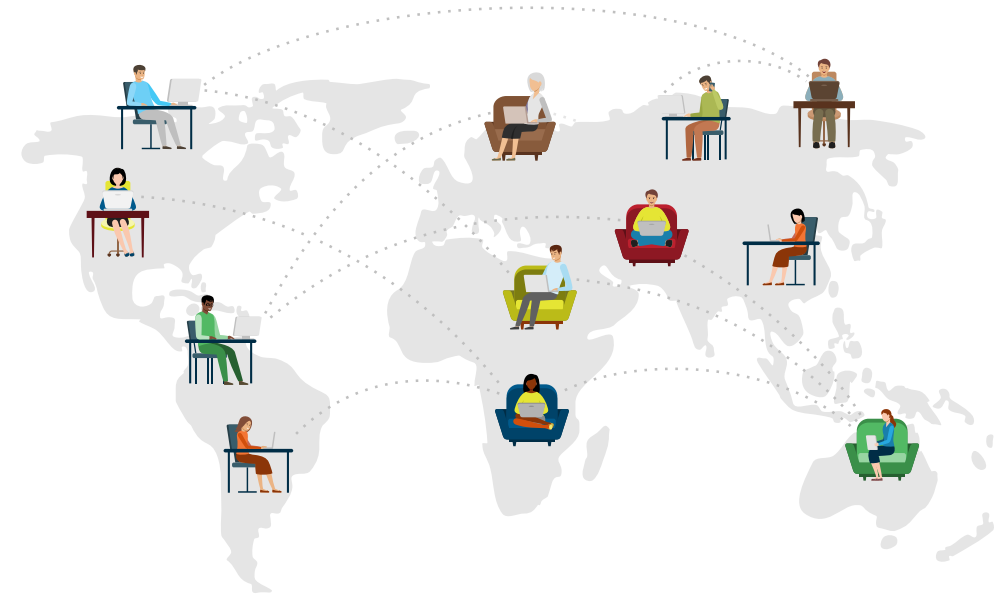
### Assessment framework



## Scope and coverage

Geography	Shoring model	Country	Representative city
Americas	Onshore	Canada	Toronto
	Nearshore	Mexico	Mexico City
	Onshore	United States	Austin
Asia Pacific	Offshore	India	Bangalore
	Offshore	China	Shanghai
Europe	Nearshore	Czech Republic	Prague
	Onshore	England	London
	Onshore	Germany	Berlin
	Onshore	Ireland	Dublin
	Nearshore	Poland	Warsaw
	Nearshore	Romania	Bucharest
	Onshore	Spain	Barcelona

Role	Definition
Full stack developer	Resources with expertise to work across all layers of the software stack
Cloud architect	Responsible for designing cloud computing infrastructure and converting technical requirements into architecture and design of cloud environment

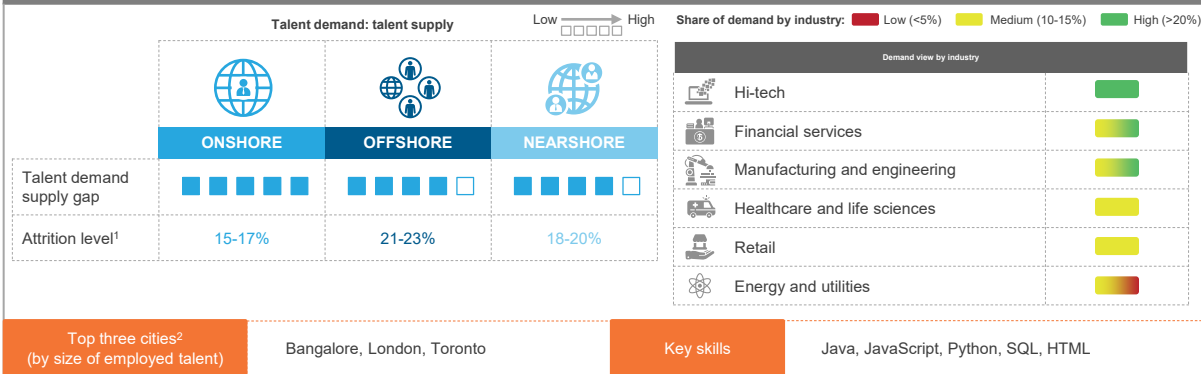


Top 12 delivery locations across geographies have been prioritized. They represent the most leveraged locations for global delivery of niche IT services.



# This study offers deep dive insights into key role and location related aspects for full stack development and cloud architect roles

## Full stack development: global landscape (by shoring model)



<sup>1</sup> Represents annualized voluntary attrition excluding attrition during training period and blended across all roles, reflective of leading organizations. Company-specific rates may vary considerably.  
<sup>2</sup> Represents top three locations based on size of talent delivering respective function for global/regional operations.  
 Source: Everest Group (2022)

## Full stack development: talent demand supply dynamics

Country	City	Talent demand : talent supply	Relative to Austin (United States)	Key employers in the market (not exhaustive)
United States	Austin	Similar favorability	Similar favorability	Amazon, GM, Visa, Google, IBM, Apple, PayPal, Oracle, Dell
India	Bangalore	More favorability	More favorability	IBM, Accenture, Infosys, TCS, Walmart, Microsoft, SAP, Oracle
Spain	Barcelona	More favorability	More favorability	Thoughtworks, Sopra Steria, Eversis, Dynatrace, NTT Data, ERNI
Germany	Berlin	Similar favorability	Similar favorability	Zalando, Wayfair, SAP, Amazon, SAP, Shopify, Hello Fresh
Romania	Bucharest	More favorability	More favorability	Endava, Adobe, Luxoft, Cognizant, Bitdefender, Pentalog
Ireland	Dublin	Similar favorability	Similar favorability	Workday, Microsoft, IBM, Fidelity Investments, Ericsson, Google
England	London	Similar favorability	Similar favorability	Bloomberg LP, Cognizant, Goldman Sachs, Capgemini, IBM, HSBC
Mexico	Mexico City	More favorability	More favorability	Globant, IBM, TCS, Wizeline, Thomson Reuters, Softek, Encora Inc.
Czech Republic	Prague	More favorability	More favorability	EPAM, Microsoft, Barclays, Oracle, IBM, Broadcom, Emplifi, MSD, Wrike
China	Shanghai	More favorability	More favorability	Huawei, IBM, Morgan Stanley, PayPal, Intel, eBay, Citi, Microsoft
Canada	Toronto	More favorability	More favorability	Scotiabank, Amazon, Shopify, RBC, TD, Manulife, CGI, Cognizant
Poland	Warsaw	Similar favorability	Similar favorability	Netcompany, KMD Poland, BlueSoft, Google, Accenture, Citi, EY

## Cloud architect: global landscape (by shoring model)



<sup>1</sup> Represents annualized voluntary attrition excluding attrition during training period and blended across all roles, reflective of leading organizations. Company-specific rates may vary considerably.  
<sup>2</sup> Represents top three locations based on size of talent delivering respective function for global/regional operations.  
 Source: Everest Group (2022)

## Cloud architect: talent demand supply dynamics

Country	City	Talent demand : talent supply	Relative to Austin (United States)	Key employers in the market (not exhaustive)
United States	Austin	Similar favorability	Similar favorability	Google, Oracle, Verkada, IBM, Accenture, Informatica, Microsoft, VMware
India	Bangalore	More favorability	More favorability	Accenture, IBM, Oracle, Wipro, DXC Technology, Cognizant, Capgemini, Infosys
Spain	Barcelona	More favorability	More favorability	King, Nestlé, GFT Group, Red Hat, Deloitte, Accenture, Eversis, Glovo
Germany	Berlin	More favorability	More favorability	Accenture, Zalando, SAP, Delivery Hero, T-Systems International, Capgemini
Romania	Bucharest	More favorability	More favorability	Oracle, Microsoft, Adobe, Endava, Nokia, IBM, Vodafone, Cognizant Softvision
Ireland	Dublin	More favorability	More favorability	Accenture, Google, Oracle, Dell EMC, Johnson & Johnson, Ericsson, VMware
England	London	More favorability	More favorability	HSBC, Accenture, Publicis Sapient, Microsoft, Lloyds Banking Group, Capgemini
Mexico	Mexico City	More favorability	More favorability	Google, SAP, Globant, Microsoft, Nissan Motor Corporation, Aspen Technology
Czech Republic	Prague	More favorability	More favorability	Microsoft, Accenture, Oracle, SAP, HP, EPAM Systems, DHL IT Services, Infor
China	Shanghai	More favorability	More favorability	Microsoft, SAP, IBM, Alibaba Cloud, Tencent, Huawei, Amazon, Aspen Technology
Canada	Toronto	More favorability	More favorability	IBM, Scotiabank, RBC, Accenture, TELUS, Microsoft, CGI, Cognizant, Google
Poland	Warsaw	More favorability	More favorability	Google, P&G, DXC Technology, Orange Polska, BlueSoft, GFT Group, Nordcloud

# Research calendar

## Locations Insider™

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Talent Handbook on Cybersecurity Skills	June 2021
Reimagining Latin America Delivery in a Post-COVID-19 World	December 2021
Technology Services Talent Handbook – Do You Have the Right Locations in Your Delivery Portfolio?	January 2022
2021 Wrapped, Unwrapping 2022	January 2022
Location Spotlight – Sri Lanka	January 2022
Location Spotlight – Riyadh	January 2022
Location Spotlight – Jamaica	January 2022
Location Spotlight – Málaga, Spain	March 2022
Impact of Climate Change on Delivery Locations Sustainability	March 2022
Global Locations State of the Market Report 2022: Talent Drives Locations Strategies   Locations PEAK Matrix®	March 2022
<b>Enterprise Acquisition Guide for Hot IT Roles</b>	<b>April 2022</b>
Global Locations State of the Market 2022: Talent Drives Locations Strategies   Risk Radar	Q2 2022
Location Spotlight – Quebec City, Canada	Q2 2022
Location Spotlight – Uruguay	Q2 2022
Impact of Demographics Change on Delivery Locations Sustainability	Q2 2022
Location Spotlight – Quebec City	Q2 2022

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