

Global Locations State of the Market 2022: Talent Drives Locations Strategies | Risk Watch

May 2022: Complimentary Abstract / Table of Contents



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Overview and abbreviated summary of key messages

Global Locations State of the Market 2022: 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

- The APAC region has become a major economic growth engine. At an overall level, the region offers a safe and secure environment with relatively high macroeconomic stability. South Korea, Singapore, and Hong Kong are the most attractive locations within the region. These locations have high-quality infrastructure, stable economy, high safety & security, and a good quality of life
- Americas offers a high quality of life; however, there are some concerns in areas such as digital readiness, regulation and ease of doing business, and quality of infrastructure, primarily in Central and South America. Regions such as Canada and the United States offer the most favorable conditions for businesses, considering the high quality of infrastructure, stable political & macroeconomic environment, and secure digital environment
- Locations in EMEA offer high-quality infrastructure, high quality of life, and a safe and secure business environment with an improving macroeconomic structure. Countries such as Germany, the United Kingdom, Estonia, and Ireland are among the leading locations offering low risk across all parameters
 - Ukraine is facing severe security challenges due to the invasion by Russia. Attacks have also been made on Kyiv and other major cities outside the conflict zone. This would likely lead to significant disruption to global service delivery in Ukraine and the broader CEE region

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

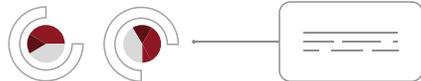
Key dimensions of assessment

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 (scores normalized on a scale of 1 to 10)
- 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



Risk dashboard

Low risk 10 0 High risk

■ 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	3	4	3	1	2	3	5	3
Country 2	3	2	4	2	3	3	4	3
Country 3	8	8	10	8	9	9	10	9
Country 4	4	4	7	6	6	5	6	5
Country 5	3	1	3	3	3	3	4	3
Country 6	3	4	6	2	4	4	6	4
Country 7	2	5	3	2	3	2	3	3

Methodology and key inclusion



- Infrastructure quality**
- Quality of overall infrastructure
 - Quality of telecom infrastructure
 - Availability of IT/BP real estate
 - Quality of power infrastructure



- Safety and security**
- Security risk
 - Threat of disruption from natural disasters
 - Business costs of crime and violence



- Geopolitical stability**
- Risk of political instability
 - Threat of external intervention
 - State of democracy
 - Corruption levels



- Digital readiness**
- Cybersecurity risk
 - Data security risk
 - Adoption of digital services
 - Quality of technology infrastructure
 - Level of innovation



- Macroeconomic stability**
- Overall macroeconomic stability
 - Financial risk
 - Country debt risk



- Quality of life**
- 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



- Regulations and ease of doing business**
- Overall legal and regulatory risk
 - Strength of IP protection laws
 - Ease of doing business
 - Stringency of labor laws



Research calendar

Locations Insider™

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Location Spotlight – Sri Lanka	January 2022
Location Spotlight – Riyadh	January 2022
Location Spotlight – Jamaica	January 2022
2021 Wrapped, Unwrapping 2022	January 2022
Location Spotlight – Ahmedabad	March 2022
Global Locations State of the Market Report 2022: Talent Drives Locations Strategies Locations PEAK Matrix®	March 2022
Impact of Climate Change on Delivery Location Sustainability	March 2022
Global Locations State of the Market 2022: Talent Drives Locations Strategies Risk Watch	May 2022
Global Locations State of the Market 2022: Talent Drives Locations Strategies Key Trends Shaping the Landscape	Q2 2022
Location Spotlight – Uruguay	Q2 2022
Location Spotlight – Malaga, Spain	Q2 2022
Impact of Demographic Changes on Location Delivery Sustainability	Q2 2022
Enterprise Acquisition Guide for Hot IT Roles	Q2 2022
Location Spotlight – Fukuoka, Japan	Q2 2022
Location Spotlight – Quebec City, Canada	Q2 2022

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