

A World of Words: Examining the Spread of European Languages Across the Globe

March 2023: Complimentary Abstract / Table of Contents



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Background and objective

With globalization, businesses are expanding their operations to different parts of the world, and it is becoming increasingly important to communicate with customers in their native language. While English is broadly viewed as the lingua franca of business, global companies are able to expand their market reach effectively to different countries by operating in different languages. Over the past decade, the demand for speakers of European languages has increased manifold; and while nearshore European countries can be leveraged for services delivery, there can be some potential business tradeoffs (e.g., higher cost of operations). Today, European language speakers are globally spread and, hence, organizations need not limit themselves to just Europe for services delivery in European languages.

This Everest Group handbook supports organizations in their efforts to identify the right locations for delivering services in European languages. It highlights the relative attractiveness of key global locations, based on a holistic and multi-faceted assessment. At an overall level, this handbook covers the languages delivery attractiveness assessed on the following parameters:

Parameters considered for assessment of overall language-location attractiveness



Assessment framework (page 1 of 2)

This handbook assesses the attractiveness of key locations for language-based services delivery

- Language scalability potential:** reflects the potential number of global services professionals that can be hired over the next 12 months across all levels of seniority (in a typical delivery pyramid), on a market average basis, with a steady state market scenario and on the condition that other organizations are not starting to hire very aggressively in the local market
 - Actual numbers may vary based on company-specific factors such as brand positioning, attrition, salaries offered, career growth practices, and other policies
 - Estimates provided correspond to those at an overall global services level and not specific to any service line / industry; requirement of technical/functional skills with language skills will decrease scalability
- Language proficiency:** ability of global services professionals in a country to use and understand a language at a certain level/degree. We rate the proficiency at the levels mentioned below:

| Delivery language – levels of proficiency | | | Comments |
|---|----|--------------------|---|
| A Basic user | A1 | Beginner | <ul style="list-style-type: none"> Understand and use familiar, day-to-day expressions Interact, provided others speak slowly and clearly |
| | A2 | Elementary | <ul style="list-style-type: none"> Understand sentences and frequently used expressions (e.g., personal or family introductions, shopping) Use simple words/phrases to explain his/her background |
| B Independent user | B1 | Intermediate | <ul style="list-style-type: none"> Stronger understanding, can respond to standard scenarios encountered at work Emerging ability to convey domain-specific information |
| | B2 | Upper-intermediate | <ul style="list-style-type: none"> Can understand complex/domain-intensive information in the field of specialization Can interact with a good degree of fluency and spontaneity |
| C Proficient user | C1 | Advanced | <ul style="list-style-type: none"> Can communicate fluently and spontaneously Use language flexibly and effectively for professional or social purposes |
| | C2 | Proficient | <ul style="list-style-type: none"> Can understand and summarize information from both written and spoken sources, reconstruct arguments, etc. Coherent presentation of domain knowledge |

Assessment framework (page 2 of 2)

This handbook assesses the attractiveness of key locations for language-based services delivery

- **Salary premium over English language:** corresponds to typical market average salary premiums for supporting global services delivery in a non-native language – these premiums are applied over and above the English language delivery. Company-specific salary premiums may vary
- **Proportion of locals vs. expats:** mix of locals and expats supporting global services delivery in a specific language
- **Operating and business environment:** includes assessment of the broader set of external factors and conditions that directly or indirectly impacts the day-to-day operations or overall performance and strategy of a business or organization
 - **Operating environment:** favorability of drivers impacting the global services enabling ecosystem:
 - ◆ General infrastructure: availability of basic infrastructure needed to support business operations; based on factors such as availability and transparency of real estate, ease of connectivity, and availability of utilities
 - ◆ Ease of remote working: current status of digital readiness, IT penetration, availability of co-working spaces, and innovation potential to scale services
 - ◆ Safety and security: susceptibility to natural disasters and business cost of crime and violence
 - ◆ Quality of life: ability to access favorable healthcare facilities, education system, and environment
 - **Business environment:** favorability of business-related considerations essential to support growth in the global services arena:
 - ◆ Macroeconomic stability: risks affecting the country's stability such as macroeconomic risks, financial risks, and country-credit risks
 - ◆ Geopolitical stability: risks affecting the country's stability such as external interventions and political risks
 - ◆ Regulatory environment and ease of doing business: legal and regulatory hurdles to business operations

Scope and coverage



Eight European languages...

Dutch

French

German

Italian

Polish

Portuguese

Russian

Spanish



...across 23 countries have been assessed in detail

Latin America (LATAM)



Argentina



Colombia



Costa Rica



Mexico

Middle East and Africa (MEA)



Egypt



Morocco

Asia Pacific (APAC)



India



Philippines



Malaysia



Vietnam

Central and Eastern Europe (CEE)



Bulgaria



Czech Republic



Greece



Hungary



Lithuania



Poland



Romania



Slovakia



Turkey

Western Europe



Ireland



Scotland



Portugal



Spain

This handbook assesses eight European languages across 23 locations in Europe, Asia, Middle East and Africa (MEA), and Latin America



Research calendar

Locations Insider™

■ Published
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|--|-------------------|
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