

Location Spotlight – Northern Ireland

December 2023 : Complimentary Abstract / Table of Contents



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Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

Robust definitions and frameworks

Talent pool scalability and sustainability assessments, cost arbitrage sustainability, and risk assessment frameworks

02

Primary sources of information

Annual contractual and operational RFIs, ongoing interactions with buyers, Global Business Services (GBS) organizations, providers, investment promotion agencies, recruiters, etc.

03

Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

Proprietary tracking and database of operating costs, labor pool, market activity, and risks (updated annually)

Year-round tracking of 300+ locations around the world

Large repository of existing research on all offshore, nearshore, and onshore locations across regions (APAC, Europe, North America, LATAM, and Africa)

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

This report provides perspectives on key aspects of the global sourcing market in Northern Ireland

Location Spotlight – Northern Ireland

Northern Ireland | at a glance



Northern Ireland, one of the four constituent countries of the UK, offers a favorable cost-talent proposition and is primarily leveraged for engineering, R&D, and IT services delivery

KEY FACTOIDS	
12,000-13,000 annual tertiary graduates	Annual operating cost per FTE 32-42% savings over London 52-62% premium over Warsaw

Current overview	Key drivers	Key challenges
<ul style="list-style-type: none"> Mainly leveraged for IT, R&D, and engineering services delivery <ul style="list-style-type: none"> Companies typically support software, R&D, and technical services; while digital services delivery (in fields such as IoT, AI, and ML) are also gaining traction rapidly Multiple instances of GBS and service providers leveraging Belfast to serve as their delivery centers and regional Centers of Excellence (CoEs) 	<ul style="list-style-type: none"> Attractive talent proposition, with access to a sizable pool of graduates well-suited for providing business process and technology services Favorable business environment with business-friendly regulations, procedures, and incentives Availability of high-quality infrastructure including advanced ICT infrastructure and good domestic and international connectivity 	<ul style="list-style-type: none"> Higher cost of operations than other CEE delivery locations such as Warsaw Limited availability of European languages (such as German, Dutch, and Italian) Some concerns around safety and security in the region due to moderate vulnerability to natural disasters and extreme weather conditions



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Location Spotlight – Northern Ireland

Northern Ireland | risk profile (page 1 of 2)

Stable geopolitical situation coupled with well developed infrastructure facilities; some concerns around high inflation in the nation

Parameter	Everest Group rating	Comments
Geopolitical		<ul style="list-style-type: none"> Northern Ireland has a devolved government system with its own legislative and executive assembly. This system allows for local decision-making on various issues, including education, health, and transportation <ul style="list-style-type: none"> The UK government remains responsible for national policy on all matters that have not been devolved, including foreign affairs, defense, social security, macro-economic management, and trade Although the overall level of violence in Northern Ireland has decreased significantly in the past few years, sectarian divisions remain prominent and a small but lingering threat from dissident republican groups persists
Macroeconomic		<ul style="list-style-type: none"> Northern Ireland is facing inflationary pressures from high global commodity prices and tight labor markets <ul style="list-style-type: none"> The country experienced an easing in inflationary pressures in H1 2023; however, signs of loss of the positive momentum gained in H1 are seen across businesses, with rising labor costs driving inflation rates up again The UK's ban on Russian oil and the departure of EU workers in large numbers over the course of the pandemic exacerbated these pressures The UK and the EU have recently signed an agreement (the Windsor Framework), which will allow for free movement of goods between Northern Ireland and Great Britain, which were previously subject to duties, strict inspections, and unnecessary paperwork
Infrastructure		<ul style="list-style-type: none"> Independent of the UK, the Government of Northern Ireland's Department of Infrastructure is responsible for the development of vital infrastructure and services including water and sewerage networks, roads and footpaths, and public transport services within the country While it benefits from a well-connected road network, there is a need for regular maintenance and upgradation to address concerns related to the deteriorating condition of road infrastructure <ul style="list-style-type: none"> Efforts in this regard are facing budgetary issues due to the high investment cost for infrastructure upgradation Northern Ireland has various industrial and business parks (such as Boucher Business Centre and Fortwilliam Business Park) strategically located across the region, offering suitable facilities and infrastructure for businesses

Source: Everest Group (2023); EIU; Transparency International; OECD; OPEC; World Bank; WEF; investment agencies; interviews with market players

Research calendar

Locations Insider™

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Location Spotlight – Turkey	July 2023
Location Spotlight – Chile	July 2023
Location Spotlight – Thailand	August 2023
Talent Demand Trends India IT Services – H1 2023	August 2023
Location Spotlight – Vietnam	September 2023
Location Spotlight – Estonia	September 2023
Location Spotlight – Indonesia	September 2023
Global Locations State of the Market 2023: Changing Locations Landscape in the Face of Economic Uncertainty Locations PEAK Matrix®	September 2023
Location Spotlight – Serbia	November 2023
Location Spotlight – Northern Ireland	December 2023
Service Provider Compass™ – Global Services Delivery from Mexico	Q1 2024
Tapping into the Ripe African Global Services Delivery Market	Q1 2024
Global Locations State of the Market 2023: Key Trends Shaping the Landscape	Q1 2024
The Philippines: a Sustainable Location for Global Services Delivery	Q1 2024
Locations Spotlight - Argentina	Q1 2024

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