



Talent Handbook for Language Skills: Answering the Calls for a Global Marketplace

Locations Insider™

Market Report – November 2019: Complimentary Abstract / Table of Contents

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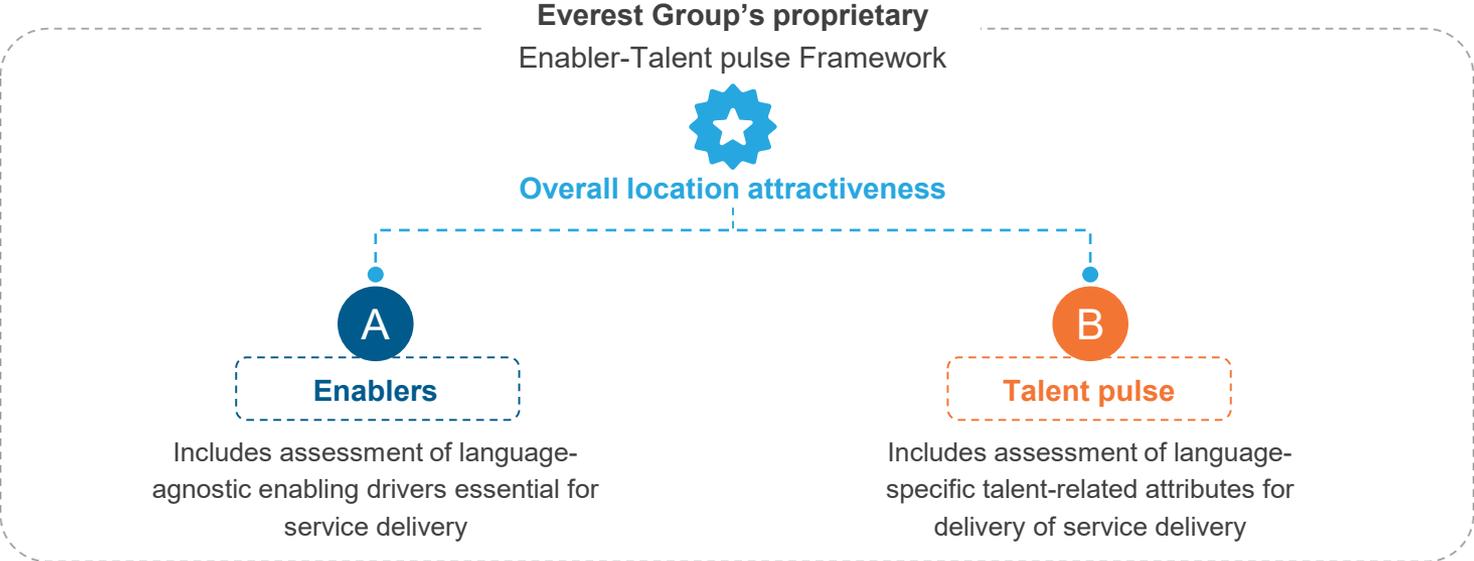
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Background and aim of this handbook

With more organizations expanding globally, having a multi-lingual workforce has become a critical success factor. While English is broadly viewed as the lingua franca of business, global companies are undoubtedly able to enjoy richer, more productive conversations with stakeholders across borders when they can operate in different languages. As players gear up to penetrate new markets and/or solidify their foothold in existing markets, they need to accommodate the communication challenges of a global marketplace.

This handbook by Everest Group aims to support market players in their quest for supporting the right language(s) from the right location. It highlights the relative attractiveness of key global locations for supporting global languages, based on a holistic and multi-faceted assessment covering 20+ parameters. At an overall level, this handbook covers the languages delivery attractiveness on two broad dimensions:



Source: Everest Group (2019)

Scope and coverage



15 languages have been grouped into two clusters for detailed assessment

Asian languages				European languages			
Arabic	Bahasa Indonesia	Japanese	Korean	Dutch	French	German	Italian
Malay	Mandarin	Thai		Portuguese	Russian	Spanish	

**English
(baseline)**



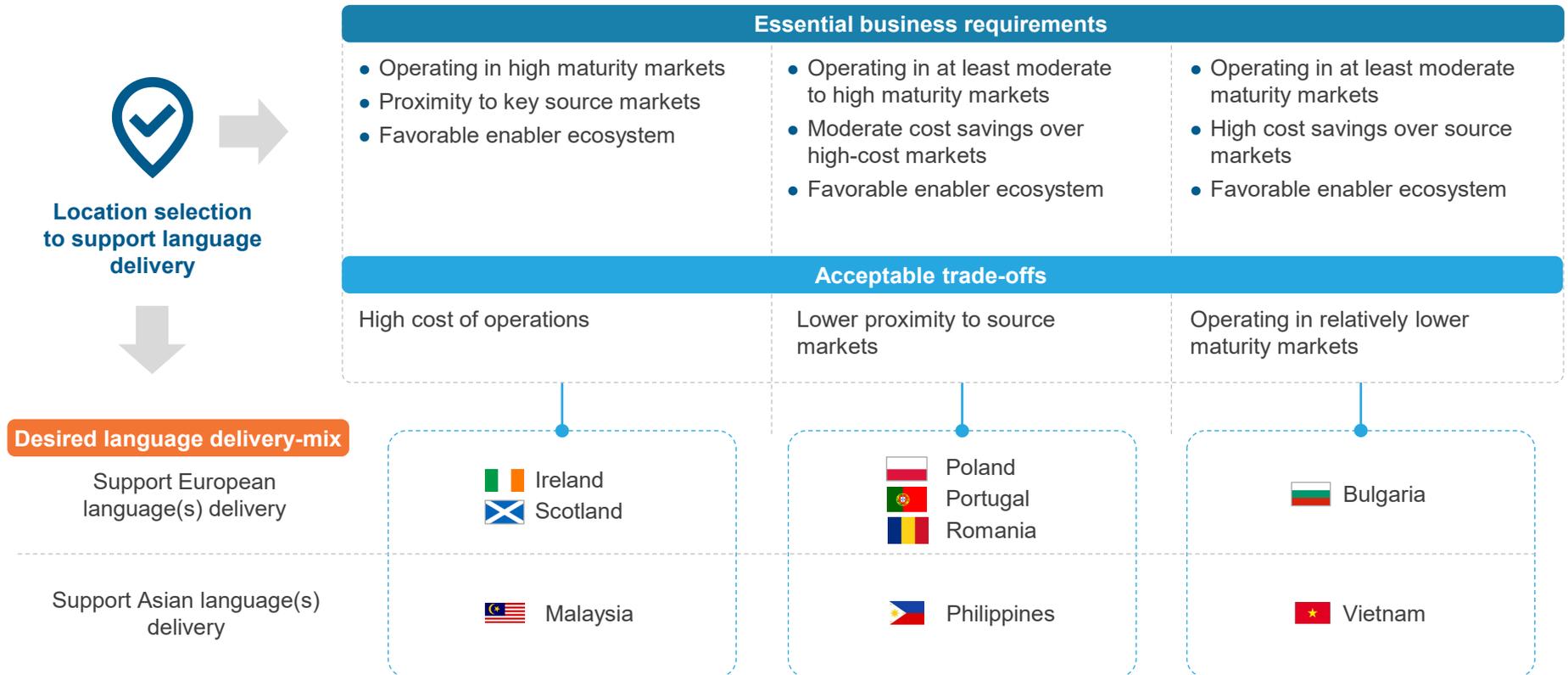
20 locations with participation from all parts of Europe, Asia, Middle East and Africa (MEA), and Latin America have been prioritized for assessment. These locations represent the most commonly leveraged locations for language-based service delivery

CEE	Nearshore Europe	Asia	Latin America	Middle East
 Bulgaria	 Czech Republic	 Ireland	 Argentina	 Egypt
 Poland	 Romania	 India	 Costa Rica	
 Slovakia	 Scotland	 Malaysia	 Mexico	 Morocco
	 Hungary	 Vietnam	 Philippines	
	 Portugal	 China	 Colombia	

Overview and summary of key messages

The report covers details around attractiveness of 20 locations from across Europe, Asia, Middle East and Africa (MEA), and Latin America for delivery of 15 European and Asian languages. This handbook supports stakeholders that are evaluating locations to deliver multilingual services and need actionable insights on considerations such as cost savings, language scalability, talent potential, and business proximity.

The following framework will support leaders to ascertain best-fit location considering internal business considerations such as language delivery mix, speed-to-market, and aspirational cost savings:



This handbook assesses 20 locations across 15 languages; below are four charts to illustrate the depth of the report

Everest Group's proprietary Enabler-Talent pulse framework

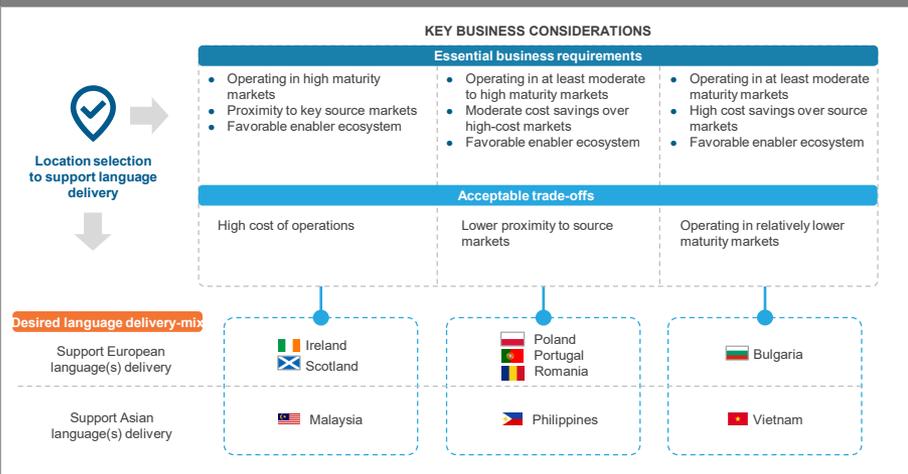


Enabler assessment: Talent potential

Location	Extent of market congestion 2019; Rating	Wage inflation ¹ 2019; Percentage	Attrition ¹ 2019; Percentage	Talent potential (Overall) 2019; Rating	
				Highly favorable	Least favorable
Bulgaria	Highly favorable	Moderately favorable	Highly favorable	Highly favorable	Highly favorable
Czech Republic	Least favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Hungary	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Poland	Least favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Romania	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Slovakia	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Ireland	Moderately favorable	Highly favorable	Highly favorable	Highly favorable	Highly favorable
Portugal	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Scotland	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Argentina	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Colombia	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Costa Rica	Moderately favorable	Moderately favorable	Least favorable	Moderately favorable	Moderately favorable
Mexico	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Egypt	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Morocco	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
China	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
India	Least favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Malaysia	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Philippines	Least favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable
Vietnam	Moderately favorable	Moderately favorable	Highly favorable	Moderately favorable	Moderately favorable

Notes:
 - Presence of large number of players for service delivery (Poland, India, Philippines)
 - Marginal wage inflation (Ireland, Portugal, Scotland)
 - Significant concerns due to high wage inflation (Argentina, Colombia)
 - High attrition due to abundance of players leveraging the location for service delivery (Costa Rica, Mexico)

Talent pulse assessment: Breadth and depth of services



Talent pulse assessment: Competitive intensity

Location	Graduates studying languages ¹ 2019; Rating	Ease of hiring foreign workers 2019; Rating	English language proficiency 2019; Rating	Talent potential (Overall) 2019; Rating	
				Highly favorable	Least favorable
Bulgaria	Moderately favorable	Highly favorable	Highly favorable	Highly favorable	Highly favorable
Czech Republic	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Hungary	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Poland	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Romania	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Slovakia	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Ireland	Moderately favorable	Highly favorable	Highly favorable	Highly favorable	Highly favorable
Portugal	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Scotland	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Argentina	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Colombia	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Costa Rica	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Mexico	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Egypt	Moderately favorable	Least favorable	Highly favorable	Moderately favorable	Moderately favorable
Morocco	Moderately favorable	Least favorable	Highly favorable	Moderately favorable	Moderately favorable
China	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
India	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Malaysia	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Philippines	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable
Vietnam	Moderately favorable	Highly favorable	Highly favorable	Moderately favorable	Moderately favorable

Notes:
 - Easy to hire EU nationals; challenges while hiring non-EU nationals (Czech Republic, Hungary, Poland)
 - Pose restrictions while hiring foreign workers (Egypt, Morocco)
 - Large graduate pool studying English language (India)

Research calendar – Locations Insider

Published
 Planned
 Current release

Flagship Locations Insider reports

Release date

Location Spotlight – Guadalajara, Mexico	May 2019
Location Spotlight – Hyderabad, India	May 2019
Location Spotlight – San Jose, Costa Rica	May 2019
Location Spotlight – India	June 2019
Location Spotlight – Chennai	June 2019
Global Locations Annual Report 2019	September 2019
Location Spotlight – Egypt	September 2019
Location Spotlight – Czech Republic	September 2019
Location Spotlight – Morocco	October 2019
Location Spotlight – Romania	October 2019
Location Spotlight – Israel	October 2019
Location Spotlight – Trivandrum, India	October 2019

Thematic Locations Insider reports

Global Hotspots – Analytics in BFSI	May 2019
European Digital Services Talent Handbook: Prepare for Digital Disruption	June 2019
Talent Handbook for Language Skills: Answering the Calls for a Global Marketplace	November 2019
Global Handbook – Focus on Cloud Skills Across the World	Q4 2019

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Additional research references

The following documents are recommended for additional insight into the topics covered in this report. The recommended documents either provide additional details or complementary content that may be of interest:

1. **Global Locations Annual Report 2019** ([EGR-2019-37-R-3313](#)); 2019. The Global Locations Annual Report 2019 describes the nuances of the global services locations landscape and interprets locations-related developments and trends to help in locations portfolio strategy design. It presents insights into the market size and growth and global services exports by region and country, and offers an update of locations activity by region, country, and trends affecting global locations (changes in the investment environment, key global developments, and changes in exposure to various risks). It also provides an industry-leading comparison and analysis of key changes in maturity, arbitrage, stability, and potential of global delivery locations/cities through our PEAK Matrix™
2. **European Digital Services Talent Handbook – Prepare for Digital Disruption** ([EGR-2019-37-R-3194](#)); 2019. This handbook by Everest Group aims to support market players in their quest for supporting the right digital service from the right location. It highlights the relative attractiveness of key European locations for supporting digital services, based on a holistic and multi-faceted assessment covering 20+ parameters
3. **Talent Hotspots for Risk Analytics In BFSI** ([EGR-2019-37-R-3171](#)); 2019. This report provides a perspective on the global sourcing market for analytics services in BFSI and identifies the top locations for sourcing analytics delivery globally, considering the cost-talent tradeoff

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