Everest Group®

Market Report | Locations Insider™

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

March 2023

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01

Introduction and overview

- Research methodology
- Background and objective
- Assessment framework
- Scope and coverage

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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 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

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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

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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	• Understand and use familiar, day-to-day expressions • Interact, provided others speak slowly and clearly
	A2	Elementary	• 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	• Stronger understanding, can respond to standard scenarios encountered at work • Emerging ability to convey domain-specific information
	B2	Upper-intermediate	• 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	• Can communicate fluently and spontaneously • Use language flexibly and effectively for professional or social purposes
	C2	Proficient	• Can understand and summarize information from both written and spoken sources, reconstruct arguments, etc. • Coherent presentation of domain knowledge

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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

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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)	Middle East and Africa (MEA)	Asia Pacific (APAC)
Argentina, Colombia, Costa Rica, Mexico	Egypt, Morocco	India, Malaysia, Philippines, Vietnam

Central and Eastern Europe (CEE)	Western Europe
Bulgaria, Czech Republic, Greece, Hungary, Lithuania, Poland, Romania, Slovakia, Turkey	Ireland, Portugal, Scotland, Spain

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02

Executive summary

- Summary dashboard
- Global overview of European languages availability
- Best fit locations as per business requirements

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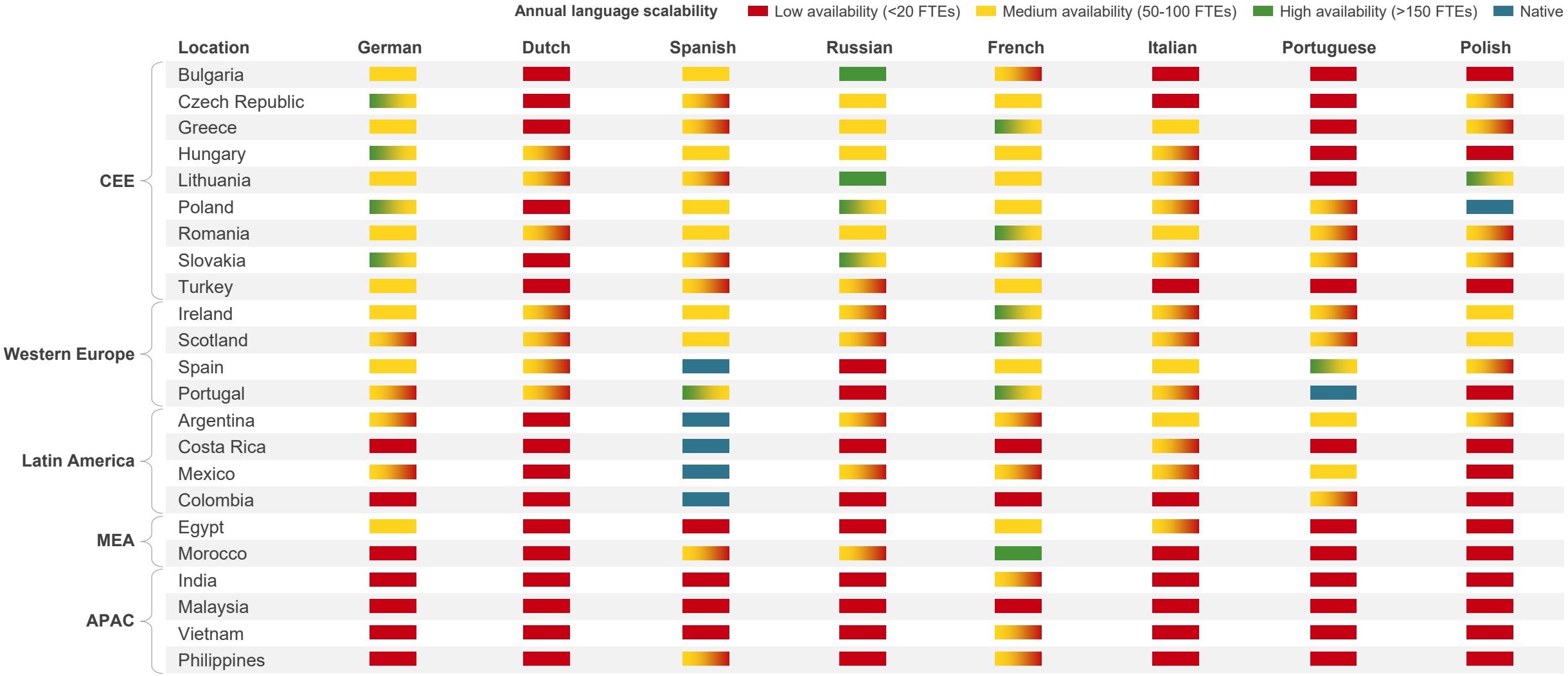
Summary dashboard

Language scalability potential across leading global services destinations



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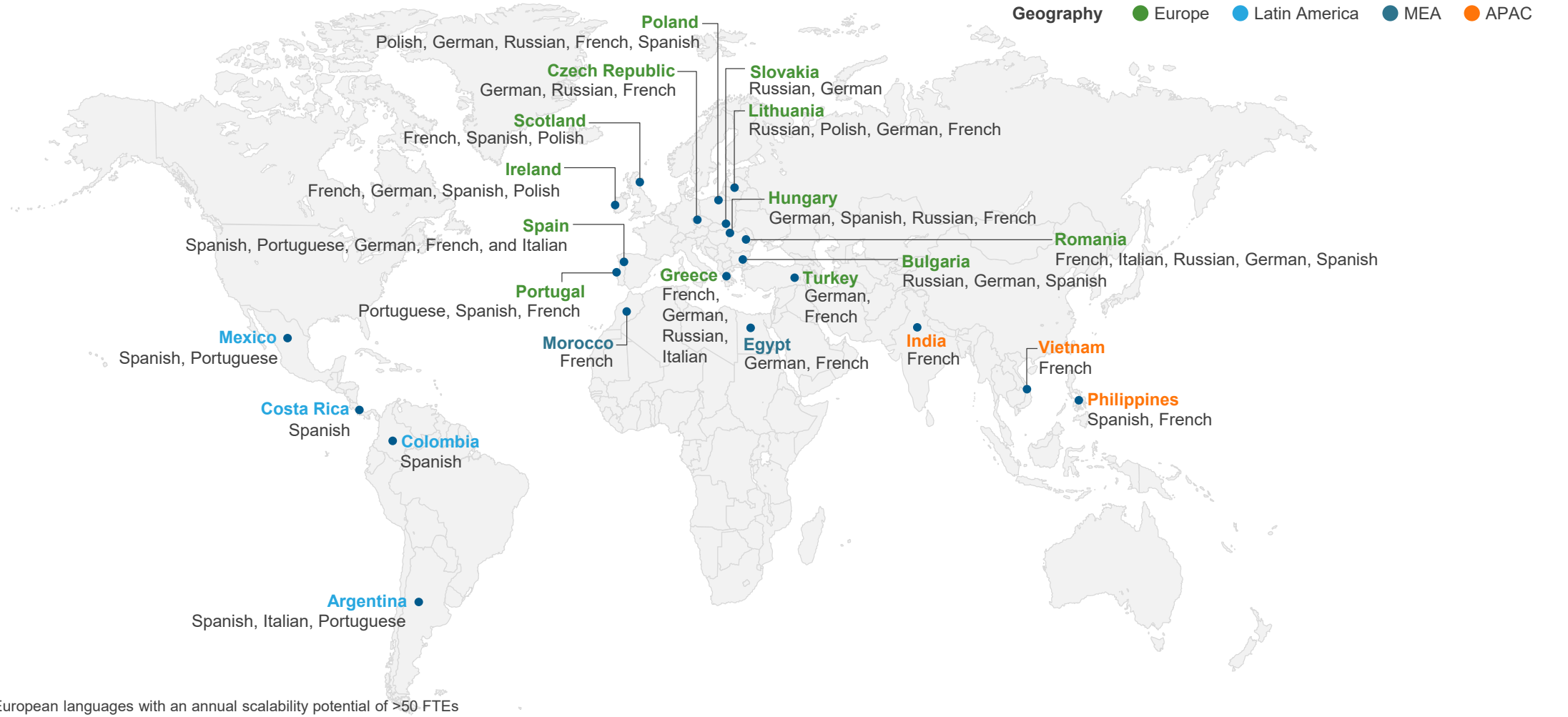
Global overview of European languages availability



Note: The exhibit highlights European languages with an annual scalability potential of >50 FTEs

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Best fit locations as per business requirements

Business requirements and tradeoffs	• Operating in at least moderate markets • Moderate language proficiency • Moderately favorable operating and business environment • Moderate proximity to source markets • Moderate compensation costs	• Operating in high maturity markets • High language proficiency • Favorable operating and business environment • Proximity to key source markets • Higher compensation costs	• Moderate compensation costs • Moderately favorable operating and business environment • Moderate language proficiency • Operating in relatively lower maturity markets • Lower proximity to source markets	• Lower compensation costs • Moderately favorable operating and business environment • Moderate to high salary premiums • Moderate to low language proficiency • Operating in relatively lower maturity markets • Lower proximity to source markets	• Lower compensation costs • Moderately favorable operating and business environment • Low language proficiency • Operating in lower maturity markets • Higher salary premiums • Lower proximity to source markets • Limited time zone overlap with source markets
Best fit locations	Poland, Slovakia, Hungary, Romania, Czech Republic, and Lithuania	Ireland, Scotland, Spain, and Portugal	Mexico, Costa Rica, Bulgaria, Greece, and Turkey	Argentina, Colombia, Morocco, and Egypt	India, Vietnam, Philippines, and Malaysia
Salary premium (over English)	**25-35%**	**20-30%**	**30-40%**	**40-50%**	**>50%**
Proficiency level					
Locals vs. expats					

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03

Detailed assessment of languages

- German
- Dutch
- Spanish
- Russian
- French
- Italian
- Portuguese
- Polish

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3A German

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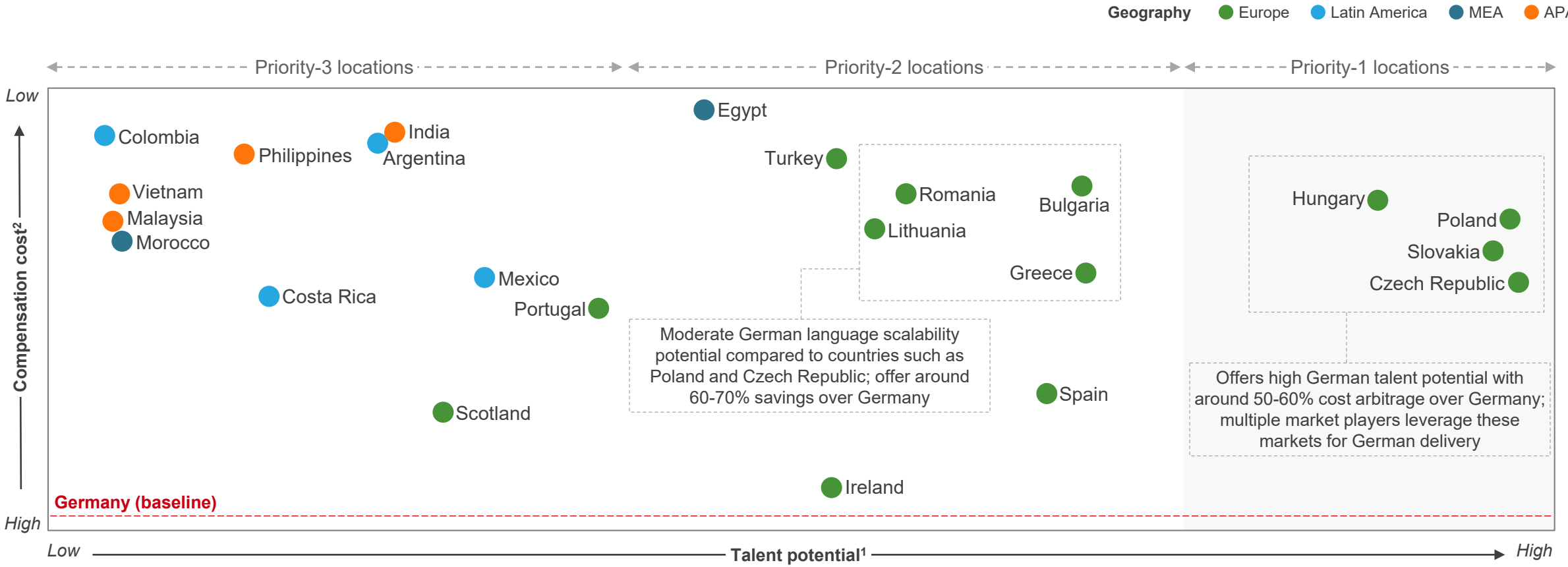
Language summary | German



1 Talent potential is a composite metric comprising the following factors: a) annual language scalability potential and b) language proficiency in the location
2 Reflective of market average compensation for global delivery of IT-BP services in a specific language
Source: Everest Group (2023)

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Language skill assessment | German (page 1 of 2)

Annual language scalability
- Low availability (<20 FTEs)
- Medium availability (50-100 FTEs)
- High availability (>150 FTEs)
- Native

Language proficiency
- Low
- Moderate
- High

- Most CEE locations offer moderate to high German language scalability potential for the delivery of IT-BP global services. This is primarily driven by historical reasons (e.g., German colonization) and geographical proximity (e.g., Poland and the Czech Republic share border with Germany)
- CEE locations also offer moderate to high German language proficiency with multiple instances of locals having C1/C2 proficiency levels
  - German is one of the most popular foreign languages taught at schools in CEE
  - A significant number of ethnic Germans are present in the Czech Republic and Hungary, given that these countries were part of the Austro-Hungarian empire before World War 2
- German is also popular in Ireland and Scotland due to high influx of people from Germany tier-2/3 locations
- Except Egypt, the majority of locations in MEA and APAC region offer limited scalability potential for German language delivery
  - Multiple instances of schools/universities in Egypt teaching German as a second foreign language
- For most of the countries, German-speaking talent is primarily concentrated in tier-1 business cities

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Language skill assessment | German (page 2 of 2)

Mostly locals ☐☐☐☐ Mostly expats

Highly favorable | Favorable, with some concerns | Significant challenges

	Location	Salary premium (% over English language)	Locals vs. expats	Business and operating environment
CEE	Bulgaria	20-30	■☐☐☐	
	Czech Republic	15-25	■☐☐☐	
	Greece	25-35	■■☐☐	
	Hungary	15-25	■☐☐☐	
	Lithuania	10-20	■☐☐☐	
	Poland	15-25	■☐☐☐	
	Romania	20-30	■■☐☐	
	Slovakia	15-25	■☐☐☐	
	Turkey	40-50	■■■☐	
Western Europe	Ireland	20-30	■■■☐	
	Scotland	25-35	■■■☐	
	Spain	25-35	■■■☐	
	Portugal	30-40	■■■☐	
Latin America	Argentina	35-45	■■☐☐	
	Costa Rica	35-45	■■☐☐	
	Mexico	30-40	■■☐☐	
	Colombia	40-50	■☐☐☐	
MEA	Egypt	30-40	■■■☐	
	Morocco	>50	■■☐☐	
APAC	India	>50	■■■☐	
	Malaysia	>50	■■☐☐	
	Vietnam	>50	■■■☐	
	Philippines	>50	■■■☐	

- Moving work outside Germany typically offers significant cost arbitrage driven by differences in cost of living, people costs, rentals, and property costs
  - Supporting German language delivery from the Czech Republic offers a cost arbitrage of ~50% over Germany
- Salary premiums are the highest across the MEA and APAC regions, driven primarily by high demand supply gap (very low German language scalability potential)
- Among the CEE and Western European region, Turkey has the highest premium of 40-50%, followed by Portugal, Scotland, Spain, and Greece
- Almost all Latin American countries attract very high premiums for German language delivery, given low talent availability (especially with B2 and above proficiency levels)
- In Latin America, MEA, and APAC regions, most of the countries (especially Egypt, India, the Philippines, and Mexico) rely on German expats for German language delivery
- The majority of countries in CEE and Western Europe offer moderate to highly favorable operating and business environment. This further amplifies the value proposition for market players to nearshore German language delivery to European countries

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3B

Dutch

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Language summary | Dutch

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Language skill assessment | Dutch (page 1 of 2)

	Location	Key cities	Scalability	Proficiency
CEE	Bulgaria	Sofia		
	Czech Republic	Prague		
	Greece	Athens		
	Hungary	Budapest		
	Lithuania	Vilnius		
	Poland	Warsaw		
	Romania	Bucharest		
	Slovakia	Bratislava		
	Turkey	Istanbul		
Western Europe	Ireland	Dublin		
	Scotland	Edinburgh		
	Spain	Barcelona, Madrid		
	Portugal	Lisbon		
Latin America	Argentina	Buenos Aires		
	Costa Rica	San Jose		
	Mexico	Mexico City		
	Colombia	Bogota		
MEA	Egypt	Cairo		
	Morocco	Casablanca		
APAC	India	Mumbai		
	Malaysia	Kuala Lumpur		
	Vietnam	Ho Chi Minh City		
	Philippines	Metro Manila		

- Dutch language is one of the most difficult languages to source at scale outside the native country and, hence, does not have the kind of reach that other European languages have across other regions
- The majority of locations in Latin America, MEA, and APAC region offer limited scalability potential for Dutch language delivery
  - Limited instances of schools/universities teaching Dutch as a foreign language
- Among CEE locations, Lithuania, Romania, and Hungary offer low to moderate scalability potential for the delivery of IT-BP global services. This is primarily driven by existing trade relations, presence of Dutch colonies, and some facets of cultural proximity
- Among Western European locations, Ireland, Scotland, and Spain offer low to moderate scalability – driven by Dutch immigration and colonization
- The majority of Dutch skilled talent is concentrated in tier-1 cities owing to the presence of relevant job opportunities provided by Dutch companies and global providers

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Language skill assessment | Dutch (page 2 of 2)

Mostly locals ▢▢▢▢ Mostly expats

Highly favorable | Favorable, with some concerns | Significant challenges

	Location	Salary premium (% over English language)	Locals vs. expats	Business and operating environment
CEE	Bulgaria	35-45	■■■▢	Favorable
	Czech Republic	35-45	■■■▢	Highly favorable
	Greece	45-55	■■■▢	Highly favorable
	Hungary	30-40	■■▢▢	Favorable
	Lithuania	25-35	■■▢▢	Highly favorable
	Poland	30-40	■■▢▢	Highly favorable
	Romania	35-45	■■▢▢	Favorable
	Slovakia	40-50	■■■▢	Highly favorable
	Turkey	>50	■■■▢	Favorable to Significant challenges
Western Europe	Ireland	30-40	■■▢▢	Highly favorable
	Scotland	35-45	■■■▢	Highly favorable
	Spain	30-40	■■■▢	Highly favorable
	Portugal	35-45	■■■▢	Highly favorable
Latin America	Argentina	>50	■■■■	Favorable to Significant challenges
	Costa Rica	>50	■■■▢	Favorable
	Mexico	>50	■■■▢	Favorable
	Colombia	>50	■■■■	Favorable
MEA	Egypt	>50	■■■■	Favorable to Significant challenges
	Morocco	>50	■■▢▢	Favorable
APAC	India	>50	■■■■	Favorable
	Malaysia	>50	■■■■	Highly favorable
	Vietnam	>50	■■■■	Favorable
	Philippines	>50	■■■▢	Favorable

- Almost all countries in Latin America, MEA, and APAC attract very high premiums for Dutch language delivery driven primarily by high demand supply gap (very low Dutch language scalability potential)
- Among the CEE and Western European region, most of the countries attract a premium of around 25-40% over English language and can potentially provide 50-60% cost savings over delivery from native Dutch-speaking countries
  - Even relatively high-cost markets such as Ireland can offer around 10% cost savings over delivery from tier-1 cities in the Netherlands
- The majority of locations in Latin America, MEA, and APAC have expats supporting Dutch language delivery, given limited talent availability and proficiency levels among the local Dutch speakers
- Few locations in CEE and Western Europe such as Hungary, Lithuania, Poland, Romania, and Ireland have a fair share of locals available to support IT-BP services delivery in Dutch language

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Spanish

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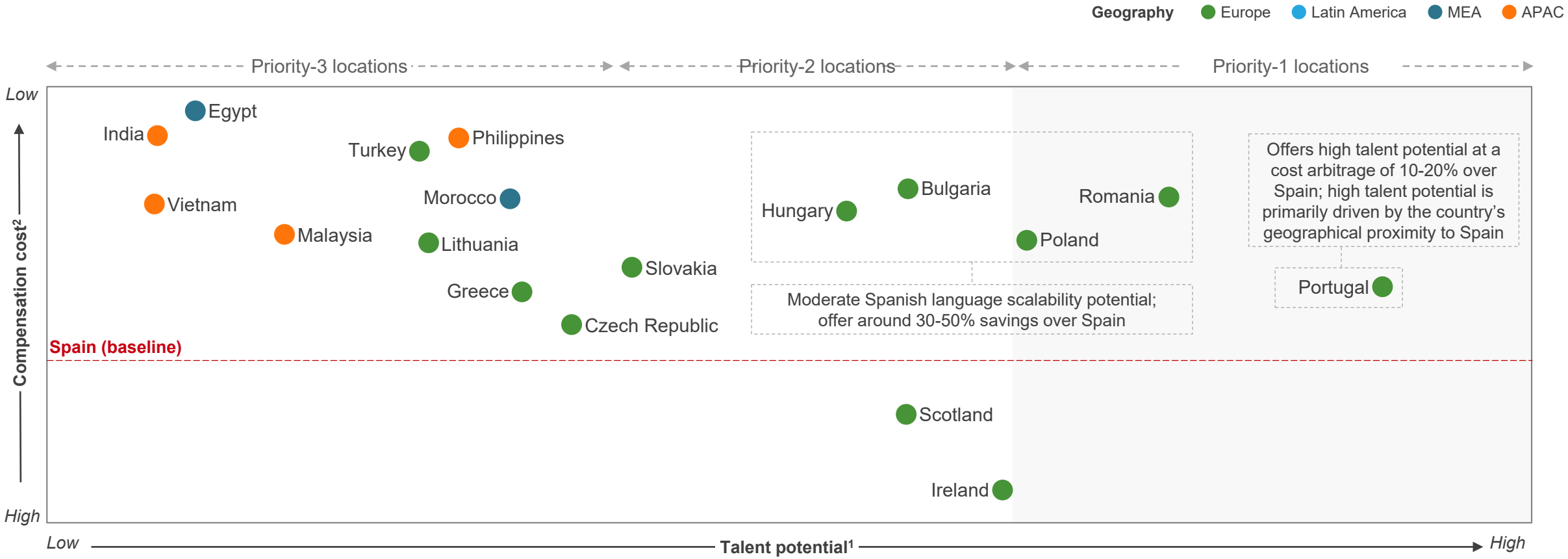
Language summary | Spanish



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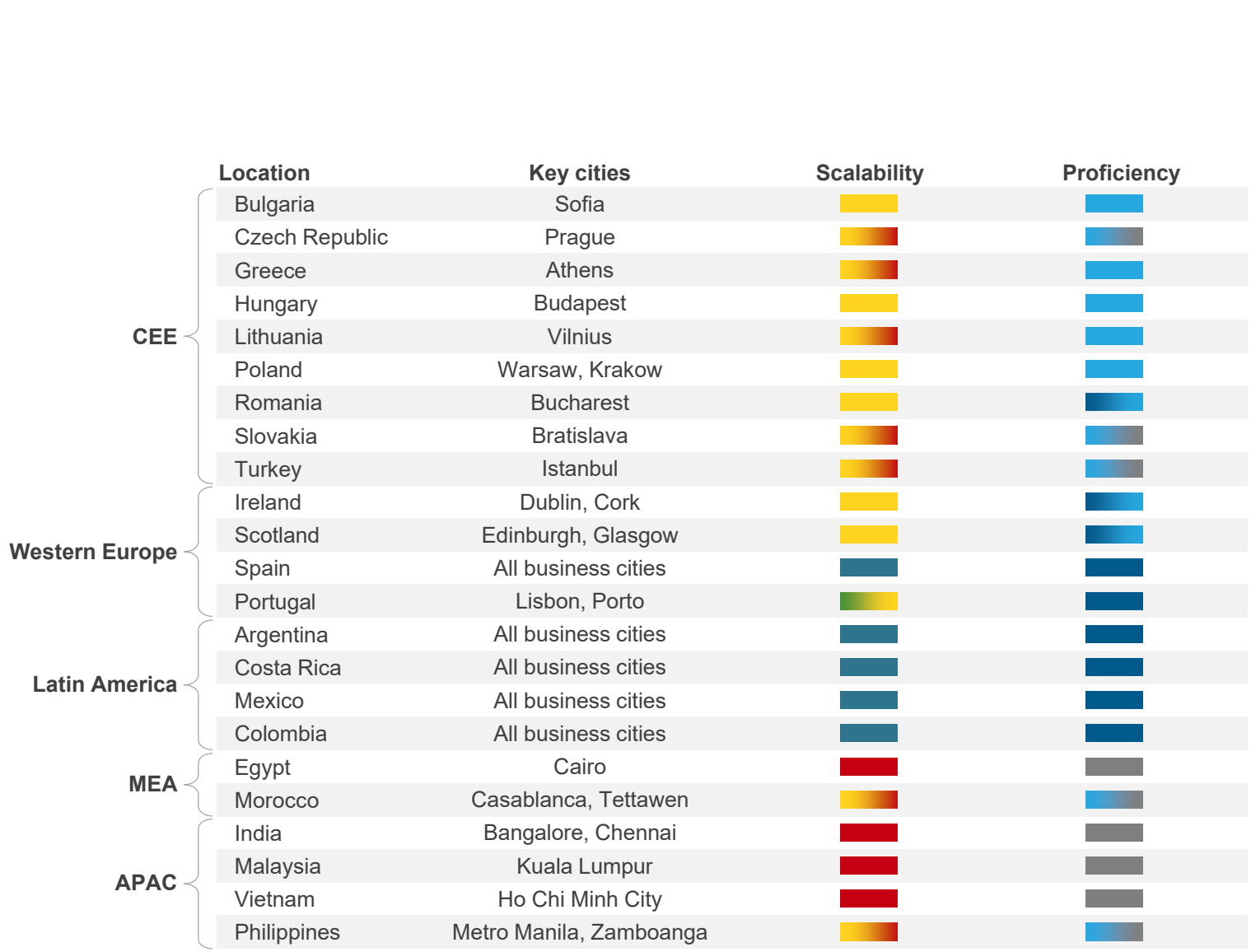
Language skill assessment | Spanish (page 1 of 2)



	Location	Key cities	Scalability	Proficiency
CEE	Bulgaria	Sofia		
	Czech Republic	Prague		
	Greece	Athens		
	Hungary	Budapest		
	Lithuania	Vilnius		
	Poland	Warsaw, Krakow		
	Romania	Bucharest		
	Slovakia	Bratislava		
	Turkey	Istanbul		
Western Europe	Ireland	Dublin, Cork		
	Scotland	Edinburgh, Glasgow		
	Spain	All business cities		
	Portugal	Lisbon, Porto		
Latin America	Argentina	All business cities		
	Costa Rica	All business cities		
	Mexico	All business cities		
	Colombia	All business cities		
MEA	Egypt	Cairo		
	Morocco	Casablanca, Tettawen		
APAC	India	Bangalore, Chennai		
	Malaysia	Kuala Lumpur		
	Vietnam	Ho Chi Minh City		
	Philippines	Metro Manila, Zamboanga		

- Other than Spain, Spanish is also the native language in multiple Latin American countries – given Spain's colonization in multiple South American countries after Columbus discovered the New World
- Evidence of multiple accent variations between Spain and Latin American Spanish – primarily driven by pronunciation, grammar, and vocabulary differences
  - Argentinian Spanish is different from Spanish in other Latin American countries
  - Global services organizations and clients face limited business challenge due to differences in Spanish accent
- Among Western European countries, Portugal offers moderate to high scalability potential for Spanish language delivery with multiple instances of professionals having C1/C2 proficiency levels
- This is primarily driven by the country's geographical proximity to Spain
- Except Morocco and the Philippines, the majority of locations in MEA and APAC region offer limited scalability potential for Spanish language delivery
  - Owing to the bilateral relations between Morocco and Spain, both countries are evaluating ways to develop Spanish as a foreign language in Moroccan schools, mainly by strengthening the training of Spanish teachers

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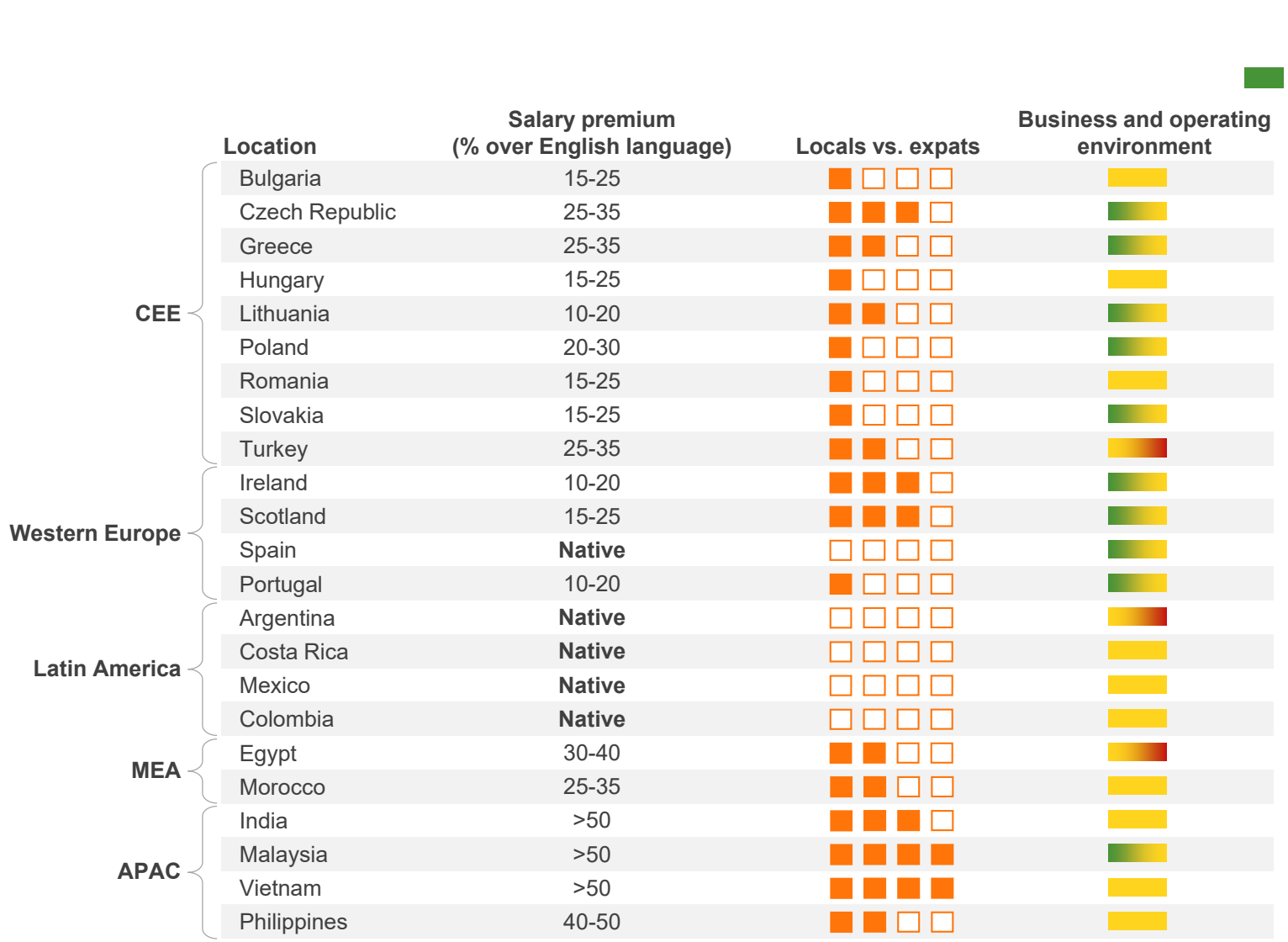
Language skill assessment | Spanish (page 2 of 2)



	Location	Salary premium (% over English language)	Locals vs. expats	Business and operating environment
CEE	Bulgaria	15-25	■□□□	
	Czech Republic	25-35	■■■□	
	Greece	25-35	■■□□	
	Hungary	15-25	■□□□	
	Lithuania	10-20	■■□□	
	Poland	20-30	■□□□	
	Romania	15-25	■□□□	
	Slovakia	15-25	■□□□	
	Turkey	25-35	■■□□	
Western Europe	Ireland	10-20	■■■□	
	Scotland	15-25	■■■□	
	Spain	**Native**	□□□□	
	Portugal	10-20	■□□□	
Latin America	Argentina	**Native**	□□□□	
	Costa Rica	**Native**	□□□□	
	Mexico	**Native**	□□□□	
	Colombia	**Native**	□□□□	
MEA	Egypt	30-40	■■□□	
	Morocco	25-35	■■□□	
APAC	India	>50	■■■□	
	Malaysia	>50	■■■■	
	Vietnam	>50	■■■■	
	Philippines	40-50	■■□□	

- The majority of locations in APAC have expats supporting Spanish language delivery, given very low proficiency levels and limited Spanish language availability among locals
- Multiple instances of local professionals in the IT-BP space possessing B2+ Spanish language proficiency in some CEE countries such as Bulgaria, Hungary, Poland, Romania, and Slovakia
- Almost all countries in APAC attract very high premiums for Spanish language delivery, driven primarily by high demand supply gap (very low Spanish language scalability potential)
- Among the CEE and Western European region, Turkey, Czech Republic, and Greece attract the highest premium
- Spanish language delivery from native Spanish-speaking countries in Latin America can offer around 30-60% cost savings over Spain
  - Some CEE countries potentially offer around 30-40% cost savings over Spain for Spanish language delivery
- Most countries in CEE and Latin America offer moderately favorable operating and business environment. This further amplifies the value proposition for market players to nearshore Spanish language delivery to these countries

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3D

Russian

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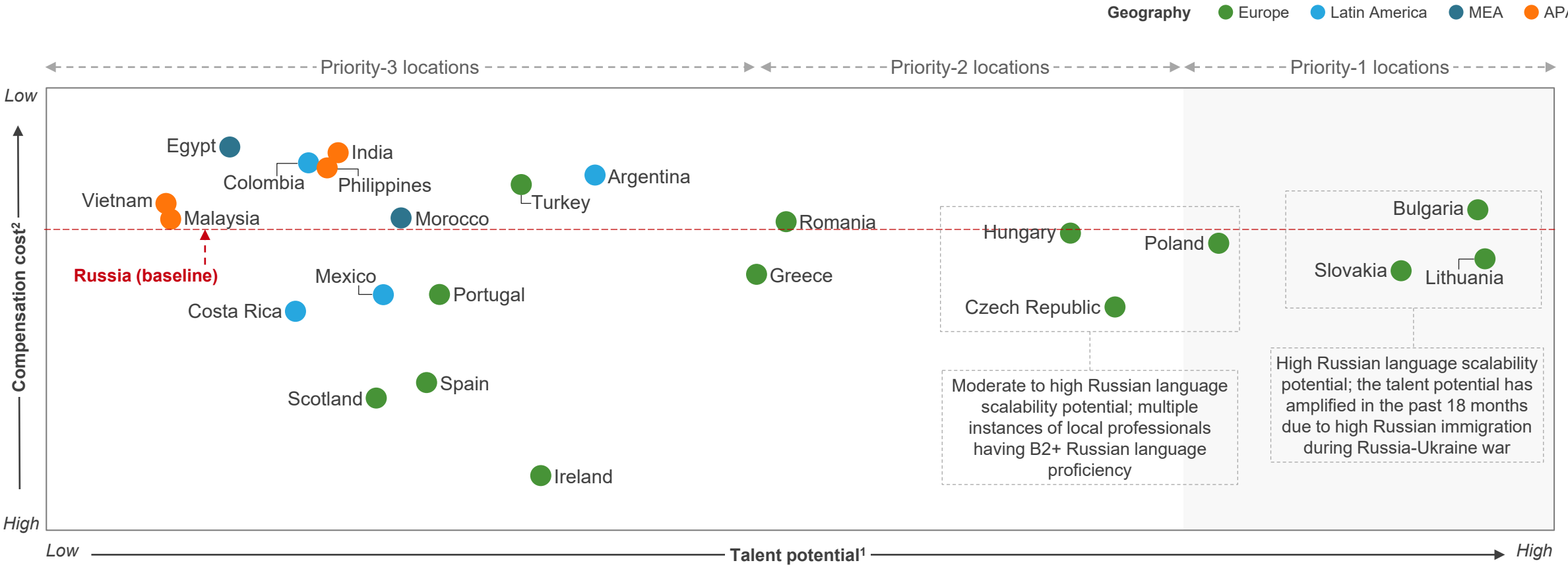
Language summary | Russian



1 Talent potential is a composite metric comprising the following factors: a) annual language scalability potential and b) language proficiency in the location
2 Reflective of market average compensation for global delivery of IT-BP services in a specific language
Source: Everest Group (2023)

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Language skill assessment | Russian (page 1 of 2)

	Location	Key cities	Scalability	Proficiency
CEE	Bulgaria	Sofia, Plovdiv, Varna		
	Czech Republic	Prague, Brno		
	Greece	Athens, Thessaloniki		
	Hungary	Budapest, Debrecen		
	Lithuania	Vilnius, Kaunas		
	Poland	Warsaw, Krakow, Wroclaw		
	Romania	Bucharest		
	Slovakia	Bratislava, Kosice		
	Turkey	Istanbul, Ankara		
Western Europe	Ireland	Dublin		
	Scotland	Glasgow		
	Spain	Barcelona, Malaga		
	Portugal	Lisbon		
Latin America	Argentina	Buenos Aires		
	Costa Rica	San Jose		
	Mexico	Mexico City, Monterrey		
	Colombia	Bogota		
MEA	Egypt	Cairo		
	Morocco	Casablanca		
APAC	India	Bangalore, Chennai		
	Malaysia	Kuala Lumpur		
	Vietnam	Ho Chi Minh City		
	Philippines	Metro Manila		

Annual language scalability
- Low availability (<20 FTEs)
- Medium availability (50-100 FTEs)
- High availability (>150 FTEs)
- Native

Language proficiency
- Low
- Moderate
- High

- Most CEE locations offer moderate to high Russian language scalability potential for the delivery of IT-BP global services with multiple instances of professionals having C1/C2 proficiency levels
  - Bulgaria, Lithuania, Poland, and Slovakia have substantial prevalence of Russian language professionals, primarily driven by Russian immigration and bilateral relations
- Among Latin American countries, Argentina and Mexico offer low to moderate scalability for Russian language delivery
  - While a large number of soviet citizens migrated to Latin America following the end of World War 2, many Russian citizens continue to migrate to Latin America since these countries are typically visa-free for Russian passport holders
- Except Morocco, MEA and APAC regions offer very limited scalability potential for Russian language delivery
- Russian is one of the most standardized languages, primarily driven by mass movement of people under the USSR and the Soviet introduction of compulsory education (across multiple neighboring countries), replacing regional dialects with the standard Russian language

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Language skill assessment | Russian (page 2 of 2)

	Location	Salary premium (% over English language)	Locals vs. expats	Business and operating environment
CEE	Bulgaria	10-20		
	Czech Republic	15-25		
	Greece	10-20		
	Hungary	15-25		
	Lithuania	10-20		
	Poland	10-20		
	Romania	15-25		
	Slovakia	10-20		
	Turkey	25-35		
Western Europe	Ireland	15-25		
	Scotland	15-25		
	Spain	15-25		
	Portugal	10-20		
Latin America	Argentina	25-35		
	Costa Rica	30-40		
	Mexico	25-35		
	Colombia	20-30		
MEA	Egypt	20-30		
	Morocco	20-30		
APAC	India	30-40		
	Malaysia	35-45		
	Vietnam	40-50		
	Philippines	30-40		

- Due to the ongoing Russia-Ukraine war, a lot of Russians have also emigrated to nearby countries such as Bulgaria, Poland, Lithuania, and some select low-visa countries such as Turkey
- Given that multiple companies have curtailed their operations in Russia due to the current geopolitical conflict with Ukraine, Russian language salary premium across geographies (especially in the CEE region) has reduced over the past 12 months
- Multiple instances of local professionals in the IT-BP space possessing B2+ Russian language proficiency in some select CEE countries such as Bulgaria, Poland, Lithuania, and Slovakia
- The majority of locations in APAC have a high proportion of expats supporting Russian language delivery, given limited Russian language availability among locals
  - Low Russian language availability further translates into very high language premium in these markets

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French

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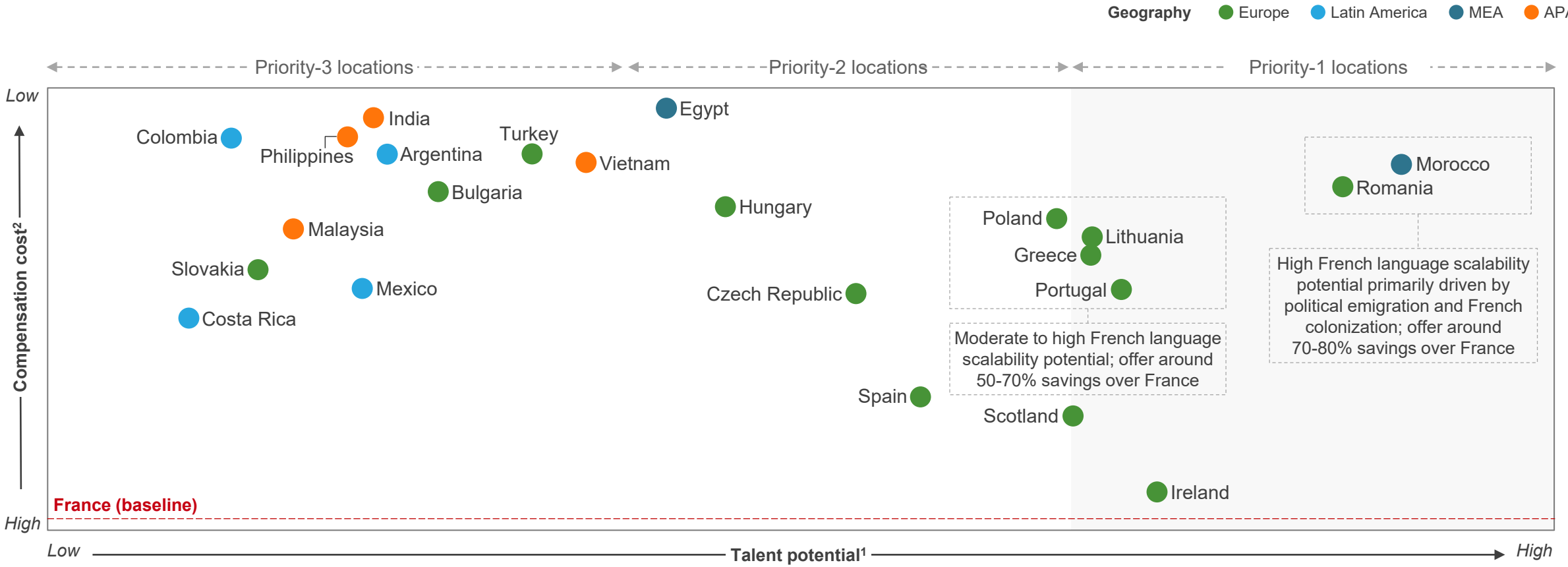
Language summary | French



1 Talent potential is a composite metric comprising the following factors: a) annual language scalability potential and b) language proficiency in the location
2 Reflective of market average compensation for global delivery of IT-BP services in a specific language
Source: Everest Group (2023)

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Language skill assessment | French (page 1 of 2)

	Location	Key cities	Scalability	Proficiency
CEE	Bulgaria	Sofia		
	Czech Republic	Prague		
	Greece	Athens		
	Hungary	Budapest		
	Lithuania	Vilnius		
	Poland	Warsaw, Krakow		
	Romania	Bucharest, Timisoara		
	Slovakia	Bratislava		
	Turkey	Istanbul		
Western Europe	Ireland	Dublin, Cork		
	Scotland	Edinburgh, Glasgow		
	Spain	Barcelona, Madrid		
	Portugal	Lisbon, Porto		
Latin America	Argentina	Buenos Aires		
	Costa Rica	San Jose		
	Mexico	Mexico City, Cordoba		
	Colombia	Bogota		
MEA	Egypt	Cairo		
	Morocco	Casablanca		
APAC	India	Tier-1 Cities		
	Malaysia	Kuala Lumpur, Penang		
	Vietnam	Ho Chi Minh City, Hanoi		
	Philippines	Metro Manila		

Annual language scalability
- Low availability (<20 FTEs)
- Medium availability (50-100 FTEs)
- High availability (>150 FTEs)
- Native

Language proficiency
- Low
- Moderate
- High

- Most CEE and Western European locations offer moderate to high French language scalability potential for the delivery of IT-BP global services
  - This is primarily driven by historical reasons (e.g., political emigration) and geographical proximity (e.g., Spain shares a border with France)
  - Most of these countries also exhibit high degree of French proficiency and, therefore, multiple French organizations leverage these countries for supporting French language delivery
- Most Latin American countries offer low to moderate scalability potential for French language delivery
- MEA countries offer moderate French language scalability potential, primarily driven by French colonization
  - There is a very slight accent difference between Moroccan French and standard French, given schools start teaching French as a secondary language from primary school onward
- Locations in the APAC region offer limited scalability potential for French language delivery
  - French was the official language of Vietnam under French colonial rule. There are multiple instances of university programs still being taught in French

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Language skill assessment | French (page 2 of 2)

	Location	Salary premium (% over English language)	Locals vs. expats	Business and operating environment
CEE	Bulgaria	20-30	■□□□	Favorable
	Czech Republic	15-25	■■□□	Highly favorable
	Greece	10-20	■□□□	Highly favorable
	Hungary	15-25	■□□□	Favorable
	Lithuania	10-20	■□□□	Highly favorable
	Poland	10-20	■□□□	Highly favorable
	Romania	10-20	□□□□	Favorable
	Slovakia	20-30	■□□□	Highly favorable
	Turkey	30-40	■■■□	Favorable → Significant challenges
Western Europe	Ireland	15-25	■□□□	Highly favorable
	Scotland	20-30	■□□□	Highly favorable
	Spain	20-30	■□□□	Highly favorable
	Portugal	15-25	■□□□	Highly favorable
Latin America	Argentina	>50	■■□□	Favorable → Significant challenges
	Costa Rica	>50	■□□□	Favorable
	Mexico	30-40	■■□□	Favorable
	Colombia	40-50	■■□□	Favorable
MEA	Egypt	25-35	■■□□	Favorable → Significant challenges
	Morocco	<10	□□□□	Favorable
APAC	India	40-50	■■□□	Favorable
	Malaysia	>50	■■□□	Highly favorable
	Vietnam	30-40	■□□□	Favorable
	Philippines	40-50	■■□□	Favorable

- The majority of locations in APAC have expats supporting French language delivery, given limited French language availability among locals
  - Multiple instances of local professionals in the IT-BP space possessing B2+ French language proficiency in Vietnam
- Multiple CEE and Western European countries (e.g., Greece, Romania, Lithuania, Spain, and Portugal) have moderate to highly proficient locals supporting French language delivery
- Among the CEE and Western European region, Turkey attracts the highest salary premium
- Almost all countries in APAC attract very high premiums for French language delivery, primarily driven by high demand supply gap (very low French language scalability potential)
- Moving work outside France typically offers significant cost arbitrage driven by differences in cost of living, people costs, rentals, and property costs
  - Supporting French language delivery from CEE countries offers a cost arbitrage of ~50-60% over France
  - Morocco also offers a similar cost arbitrage over France with multiple locals possessing C1/C2 level French proficiency

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Italian

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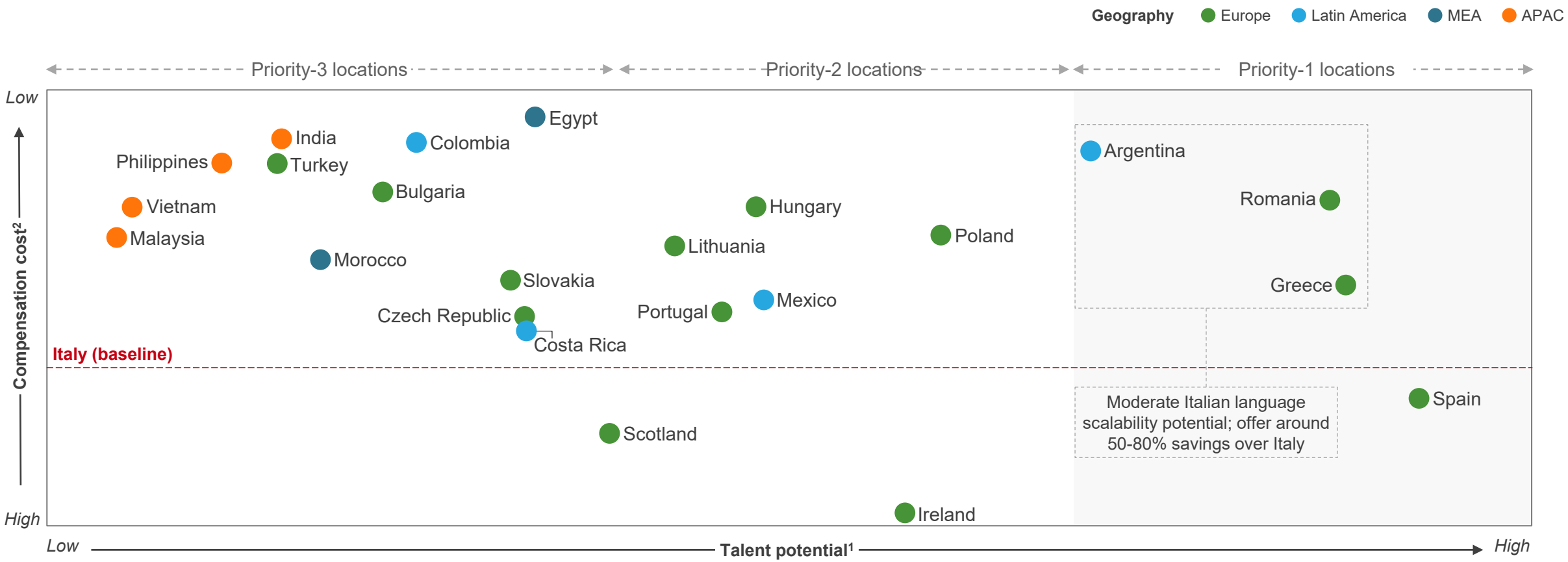
Language summary | Italian



1 Talent potential is a composite metric comprising the following factors: a) annual language scalability potential and b) language proficiency in the location
2 Reflective of market average compensation for global delivery of IT-BP services in a specific language
Source: Everest Group (2023)

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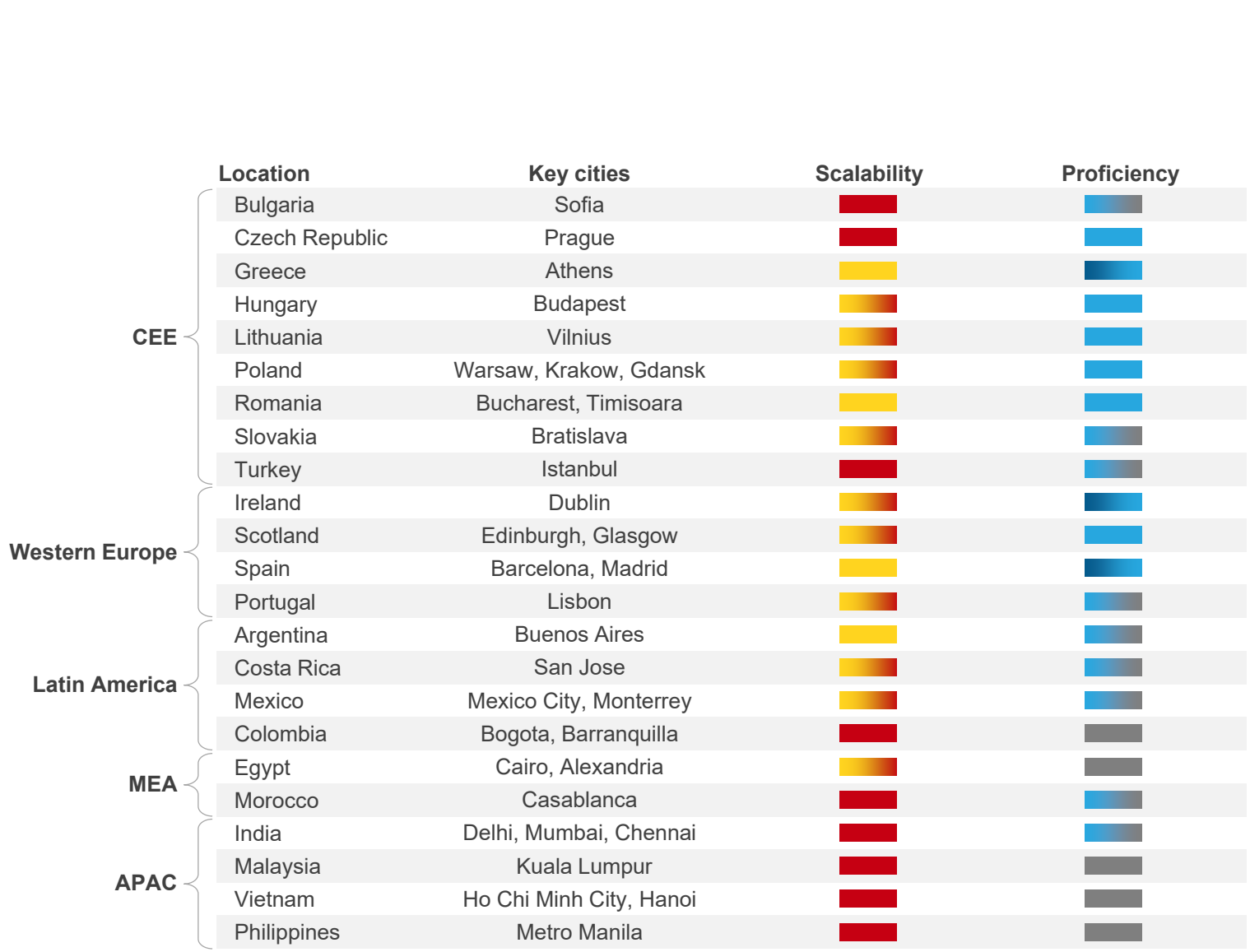
Language skill assessment | Italian (page 1 of 2)



	Location	Key cities	Scalability	Proficiency
CEE	Bulgaria	Sofia		
	Czech Republic	Prague		
	Greece	Athens		
	Hungary	Budapest		
	Lithuania	Vilnius		
	Poland	Warsaw, Krakow, Gdansk		
	Romania	Bucharest, Timisoara		
	Slovakia	Bratislava		
	Turkey	Istanbul		
Western Europe	Ireland	Dublin		
	Scotland	Edinburgh, Glasgow		
	Spain	Barcelona, Madrid		
	Portugal	Lisbon		
Latin America	Argentina	Buenos Aires		
	Costa Rica	San Jose		
	Mexico	Mexico City, Monterrey		
	Colombia	Bogota, Barranquilla		
MEA	Egypt	Cairo, Alexandria		
	Morocco	Casablanca		
APAC	India	Delhi, Mumbai, Chennai		
	Malaysia	Kuala Lumpur		
	Vietnam	Ho Chi Minh City, Hanoi		
	Philippines	Metro Manila		

- Most locations offer low to moderate Italian language scalability potential for the delivery of IT-BP global services
  - The Italian spoken in European countries outside of Italy is influenced by the local linguistic and cultural context, and it often incorporates elements of the local language
- Latin American countries offer low to moderate scalability potential for Italian language delivery, primarily driven by the large number of Italian immigrants in the late 19th and early 20th century
  - The Italian language spoken in Argentina is known as Italiano Argentino and has a distinct accent and lexicon compared to standard Italian, primarily due to immigrants bringing with them regional dialects from various parts of Italy
  - Despite these differences, Italiano Argentino remains largely mutually intelligible with standard Italian and can be understood by Italian speakers in Italy and other Italian-speaking countries
- Most MEA and APAC countries offer limited scalability potential for Italian language delivery

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Language skill assessment | Italian (page 2 of 2)

Mostly locals ▢▢▢▢ Mostly expats

Highly favorable | Favorable, with some concerns | Significant challenges

	Location	Salary premium (% over English language)	Locals vs. expats	Business and operating environment
CEE	Bulgaria	15-25	■■■▢	
	Czech Republic	20-30	■■■▢	
	Greece	20-30	■■▢▢	
	Hungary	10-20	■■■▢	
	Lithuania	10-20	■■■▢	
	Poland	15-25	■■▢▢	
	Romania	15-25	■■▢▢	
	Slovakia	20-30	■■■▢	
	Turkey	35-45	■■■▢	
Western Europe	Ireland	15-25	■■■■	
	Scotland	20-30	■■■■	
	Spain	15-25	■■■▢	
	Portugal	20-30	■■■▢	
Latin America	Argentina	35-45	■■▢▢	
	Costa Rica	40-50	■■▢▢	
	Mexico	30-40	■■▢▢	
	Colombia	40-50	■■■▢	
MEA	Egypt	30-40	■■■▢	
	Morocco	>50	■■■▢	
APAC	India	>50	■■■▢	
	Malaysia	>50	■■■▢	
	Vietnam	>50	■■▢▢	
	Philippines	>50	■■■▢	

- The majority of locations in APAC have expats supporting Italian language delivery, given very low proficiency levels and limited Italian language availability among locals
  - Compared with other European languages, both CEE and Western European countries have a relatively higher proportion of expats over locals to support Italian language delivery
- Almost all countries in MEA and APAC attract very high premiums for Italian language delivery, primarily driven by very low language scalability potential
- Moving work outside Italy typically offers significant cost arbitrage driven by differences in cost of living, people costs, rentals, and property costs
  - Supporting Italian language delivery from CEE countries offers a cost arbitrage of ~20-30% over Italy
- The majority of CEE and Western European countries offer moderate to highly favorable operating and business environment. This further amplifies the value proposition for market players to nearshore Italian language delivery to European countries

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Portuguese

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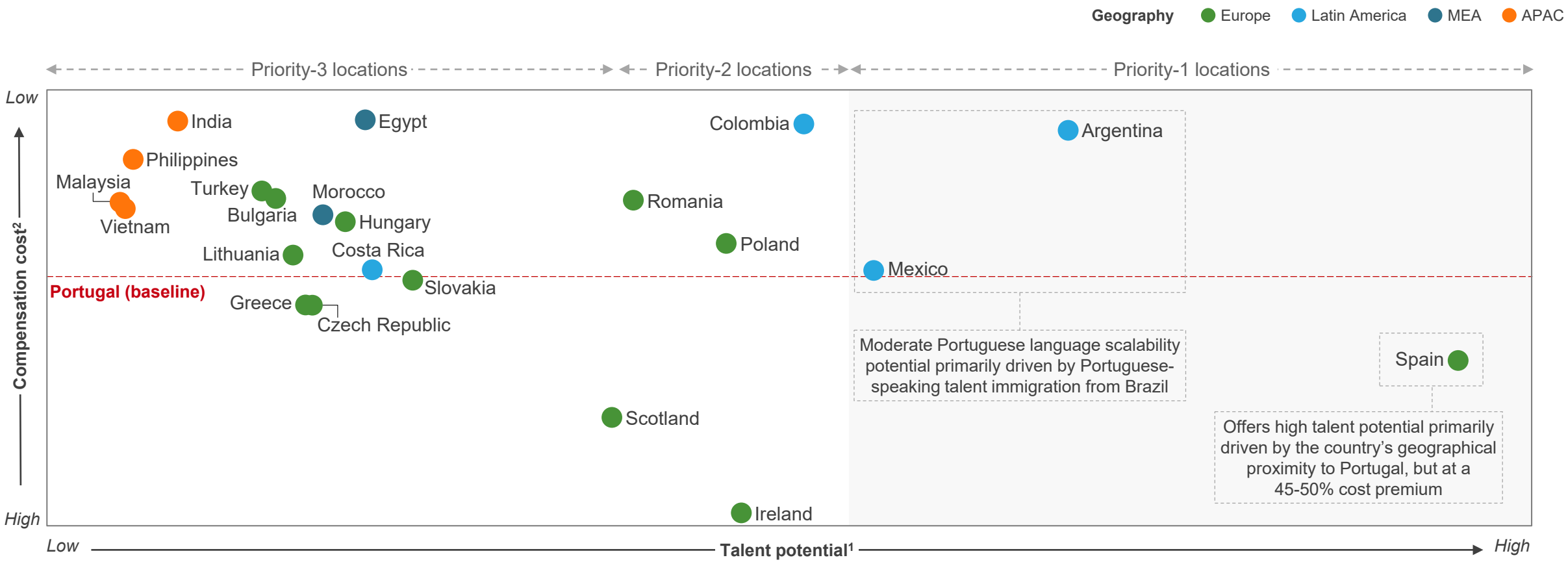
Language summary | Portuguese



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Source: Everest Group (2023)

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Language skill assessment | Portuguese (page 1 of 2)

	Location	Key cities	Scalability	Proficiency
CEE	Bulgaria	Sofia		
	Czech Republic	Prague		
	Greece	Athens		
	Hungary	Budapest		
	Lithuania	Vilnius		
	Poland	Warsaw, Krakow		
	Romania	Bucharest		
	Slovakia	Bratislava		
	Turkey	Istanbul		
Western Europe	Ireland	Dublin		
	Scotland	Edinburgh		
	Spain	Barcelona, Madrid, Seville		
	Portugal	*All business cities*		
Latin America	Argentina	Buenos Aires		
	Costa Rica	San Jose		
	Mexico	Mexico City		
	Colombia	Bogota, Medellin		
MEA	Egypt	Cairo		
	Morocco	Casablanca		
APAC	India	Delhi NCR, Mumbai		
	Malaysia	Kuala Lumpur		
	Vietnam	Ho Chi Minh City		
	Philippines	Metro Manila		

- The majority of Portuguese skilled talent is concentrated in tier-1 cities owing to the presence of relevant job opportunities
- Except Spain, other CEE and Western European locations offer low to moderate Portuguese language scalability potential for global delivery of IT-BP services
- Most Latin American countries offer moderately scalable talent potential, possessing B2+ proficiency levels for Portuguese language delivery – the talent potential is primarily driven by Portuguese-speaking talent immigration from Brazil
  - Over the past few years, Costa Rica and Colombia have experienced strong growth in Portuguese BPO capabilities, but scaling operations is an issue
- Locations in MEA and APAC offer limited scalability potential for Portuguese language delivery. Additionally, the proficiency level is also low – limited number of working professionals with B2+ language proficiency in the region

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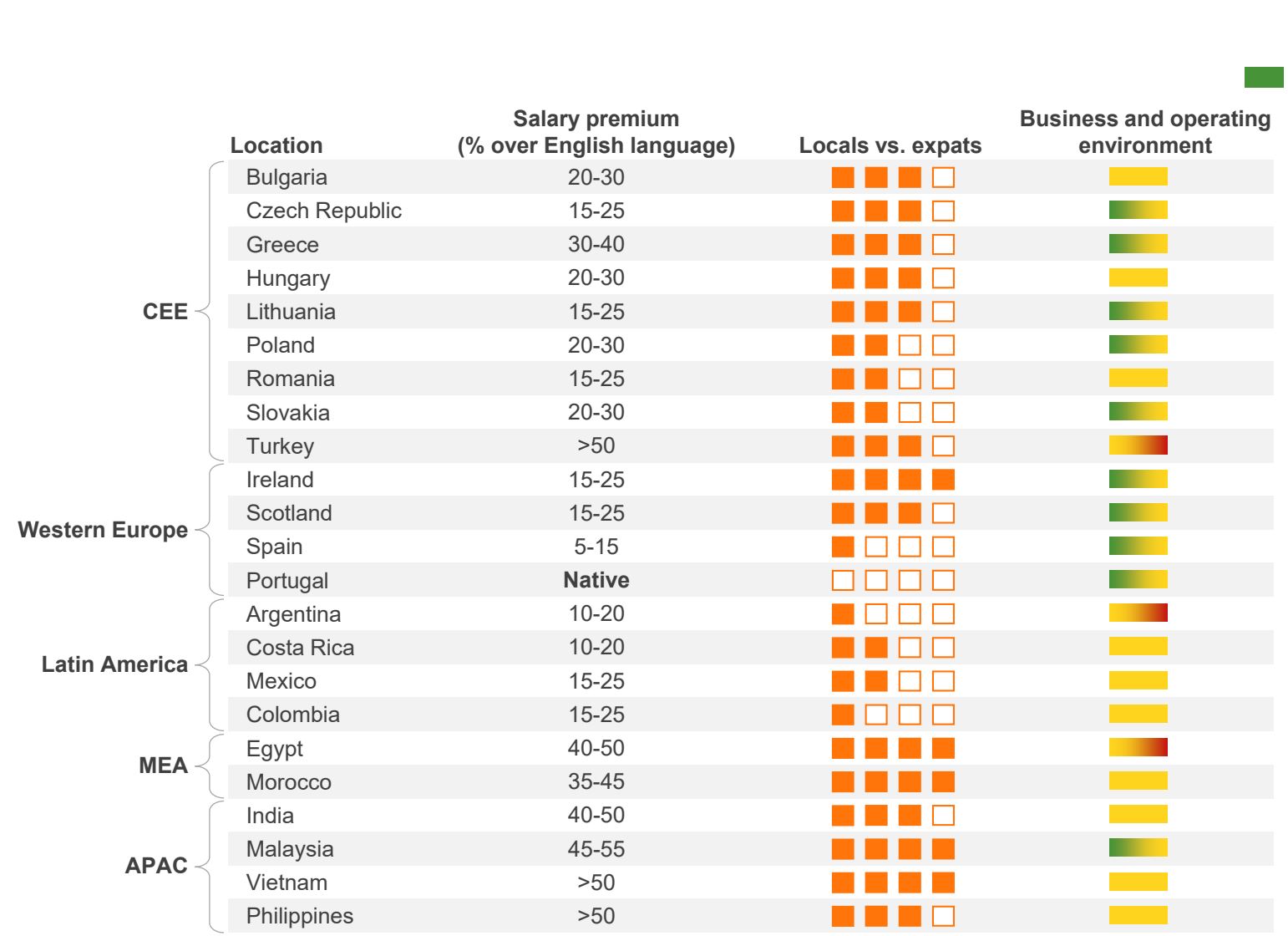
Language skill assessment | Portuguese (page 2 of 2)



	Location	Salary premium (% over English language)	Locals vs. expats	Business and operating environment
CEE	Bulgaria	20-30	■■■□	
	Czech Republic	15-25	■■■□	
	Greece	30-40	■■■□	
	Hungary	20-30	■■■□	
	Lithuania	15-25	■■■□	
	Poland	20-30	■■□□	
	Romania	15-25	■■□□	
	Slovakia	20-30	■■□□	
	Turkey	>50	■■■□	
Western Europe	Ireland	15-25	■■■■	
	Scotland	15-25	■■■□	
	Spain	5-15	■□□□	
	Portugal	**Native**	□□□□	
Latin America	Argentina	10-20	■□□□	
	Costa Rica	10-20	■■□□	
	Mexico	15-25	■■□□	
	Colombia	15-25	■□□□	
MEA	Egypt	40-50	■■■■	
	Morocco	35-45	■■■■	
APAC	India	40-50	■■■□	
	Malaysia	45-55	■■■■	
	Vietnam	>50	■■■■	
	Philippines	>50	■■■□	

- Across most Latin American countries, the local population is capable of supporting services delivery in Portuguese language at a moderate salary premium of around 10-20% (over English language delivery)
  - Supporting Portuguese language delivery from Latin American countries offers a cost arbitrage of 40-70% over Portugal
- The majority of locations in MEA and APAC have a high proportion of expats supporting Portuguese language delivery, given limited Portuguese language availability among locals
  - Low Portuguese language availability further translates into very high language premium in these markets
- Few locations in CEE and Western Europe such as Poland, Romania, Slovakia, and Spain have a fair share of locals available to support IT-BP services delivery in Portuguese language
  - Most of the CEE countries attract a premium of around 20-30% over English language
  - Delivering Portuguese from Western European countries is not economical – given the cost of delivery is way higher over native country Portugal

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3H Polish

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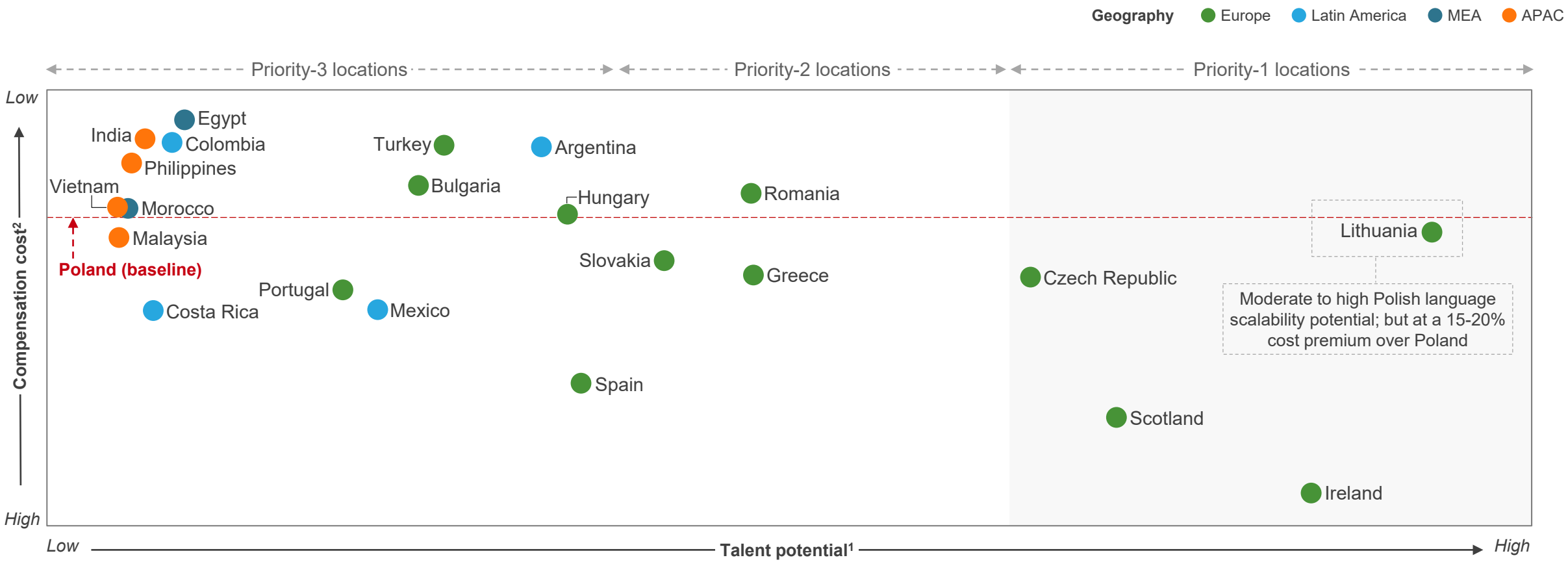
Language summary | Polish



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Source: Everest Group (2023)

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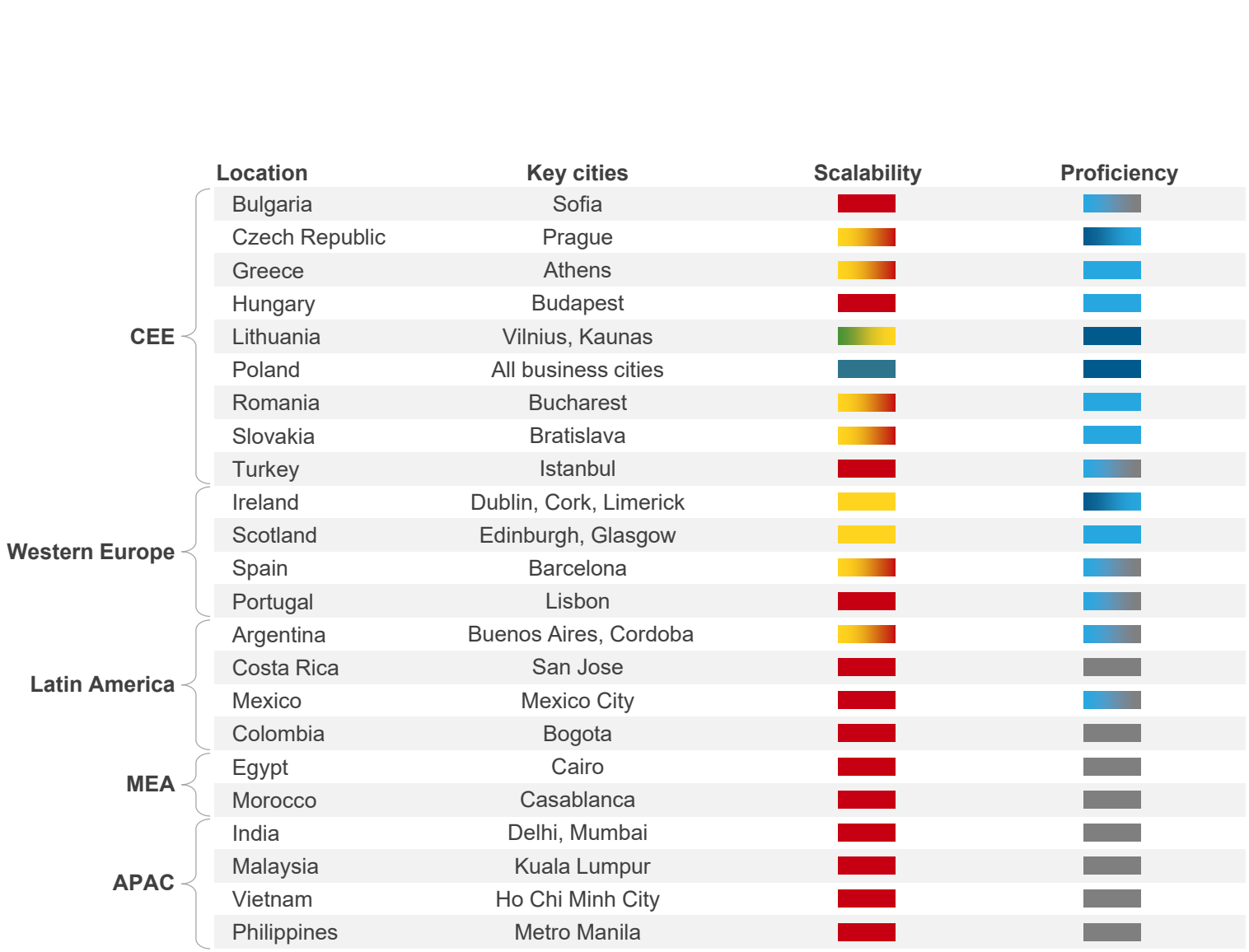
Language skill assessment | Polish (page 1 of 2)



	Location	Key cities	Scalability	Proficiency
CEE	Bulgaria	Sofia		
	Czech Republic	Prague		
	Greece	Athens		
	Hungary	Budapest		
	Lithuania	Vilnius, Kaunas		
	Poland	All business cities		
	Romania	Bucharest		
	Slovakia	Bratislava		
	Turkey	Istanbul		
Western Europe	Ireland	Dublin, Cork, Limerick		
	Scotland	Edinburgh, Glasgow		
	Spain	Barcelona		
	Portugal	Lisbon		
Latin America	Argentina	Buenos Aires, Cordoba		
	Costa Rica	San Jose		
	Mexico	Mexico City		
	Colombia	Bogota		
MEA	Egypt	Cairo		
	Morocco	Casablanca		
APAC	India	Delhi, Mumbai		
	Malaysia	Kuala Lumpur		
	Vietnam	Ho Chi Minh City		
	Philippines	Metro Manila		

- Except Lithuania, all CEE locations offer low to moderate Polish language scalability potential for the delivery of IT-BP global services
  - Although Polish schools in Lithuania teach standard Polish, there is a slight difference in the accents influenced by Lithuanian, Belarusian, and Russian language prevalence
- Among Western European countries, Ireland and Scotland offer moderate levels of Polish language scalability
  - When freedom of movement in the EU was implemented, Ireland was one of the only three EU states to completely remove restrictions on immigration from the Eastern bloc countries – thereby resulting in very high Polish immigration
- Among LATAM locations, Argentina offers moderately low talent scalability potential for Polish services delivery – however, most of the resources will have B1/B2 proficiency levels
- Locations in MEA and APAC region offer limited scalability potential for Polish language delivery

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Language skill assessment | Polish (page 2 of 2)

	Location	Salary premium (% over English language)	Locals vs. expats	Business and operating environment
CEE	Bulgaria	10-20	■■■□	
	Czech Republic	5-15	■■□□	
	Greece	15-25	■■■□	
	Hungary	15-25	■■■□	
	Lithuania	5-15	■□□□	
	Poland	**Native**	□□□□	
	Romania	10-20	■■□□	
	Slovakia	10-20	■■□□	
	Turkey	15-25	■■■■	
Western Europe	Ireland	10-20	■■■□	
	Scotland	15-25	■■■□	
	Spain	10-20	■■■□	
	Portugal	10-20	■■■□	
Latin America	Argentina	30-40	■■■□	
	Costa Rica	30-40	■■■□	
	Mexico	35-45	■■■□	
	Colombia	40-50	■■■□	
MEA	Egypt	40-50	■■■■	
	Morocco	30-40	■■■■	
APAC	India	>50	■■■■	
	Malaysia	>50	■■■■	
	Vietnam	>50	■■■■	
	Philippines	>50	■■■■	

- Among CEE and Western European regions, most of the countries attract a premium of around 10-20% over English language
- Few locations in CEE such as the Czech Republic, Lithuania, Romania, and Slovakia have a fair share of proficient locals available to support IT-BP services delivery in Polish language
- The majority of locations in MEA and APAC have a high proportion of expats supporting Polish language delivery, given limited Polish language availability among locals
  - Low Polish language availability further translates into very high language premium in these markets
- Given Poland is itself a very mature and moderate cost global services hub, moving Polish operations to other CEE countries is not very cost-effective – in fact, migrating Polish operations to some select CEE countries (e.g., Czech Republic, Slovakia, and Lithuania) attracts significant operating cost premium over delivery from Poland

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04

Appendix

- Operating and business environment methodology
- Research calendar

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Operating and business environment | methodology and key inclusions

We considered seven parameters to evaluate the overall risk across locations

Infrastructure quality

- Quality of physical infrastructure
- Quality of IT/telecom infrastructure
- Availability of IT/BP real estate

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

Ease of remote working

- Digital readiness
- Availability of nomad visa
- Availability of coworking spaces
- Level of innovation

Macroeconomic stability

- Overall macroeconomic stability
- Financial risk
- Country debt risk

Quality of life

- Access to quality medical care and education
- Environment quality
- Perception of wellbeing and happiness

Regulations and ease of doing business

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

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Research calendar

Locations Insider™

Published | Planned | Current release

Reports title	Release date
Location Spotlight – Scotland	September 2022
Location Spotlight – Barcelona, Spain	October 2022
India's Services Delivery Overview – Tier-1 Hubs Continue to Grow, Tier-2/3 Speeding Up	November 2022
Location Spotlight – Puerto Rico	November 2022
The Most In-demand Metaverse Skills in the US	November 2022
The War for Talent in Data, Analytics, and AI (DAAI): Finding the Ideal Operating Model for Organizations	November 2022
Location Spotlight – Munich, Germany	December 2022
Global Locations State of the Market 2022: Talent Drives Locations Strategies | Key Trends Shaping the Landscape	December 2022
Location Spotlight – Greece	January 2023
Wrapped 2022, Unwrapping 2023	January 2023
Location Spotlight – Fukuoka, Japan	January 2023
A World of Words: Examining the Spread of European Languages Across the Globe	**March 2023**
Location Spotlight – Brazil	Q1 2023
Location Spotlight – Singapore	Q1 2023
Global Locations Sate of the Market – Risk Radar	Q1 2023

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