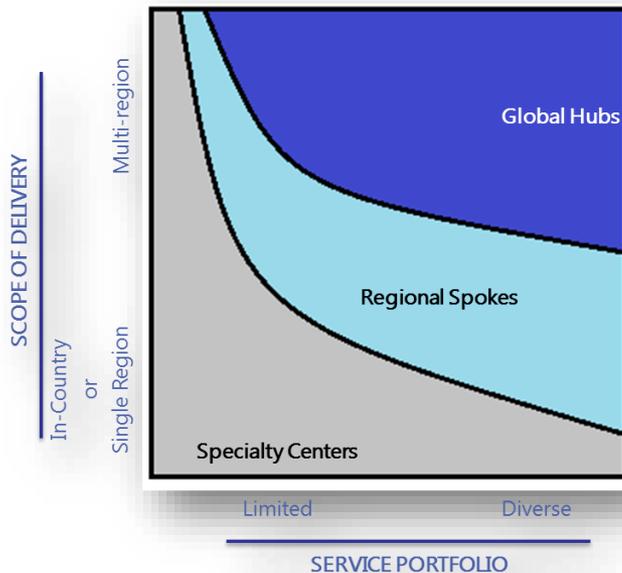


Moving beyond a mere footprint, location portfolios will help organizations execute thought through selection of locations that serve best of class service delivery for clients



Market and talent access are drawing new casts in which the industry looks at global expansion. Hand in hand with industry maturity the global delivery model has moved from leveraging mostly offshore locations to a harmonious network of delivery capabilities driving strategic impact.

As the focus of sourcing focus shifts from costs, to client proximity, better access to skills & markets, managing concentration risk perceptions and serving clients globally; global service delivery networks and their management have only gained more importance. Global delivery footprint expansion today needs a greater understanding of risks, management challenges and location strengths to build a global location portfolio.

Moving beyond a mere footprint, location portfolios will help organizations execute thought through selection of locations that serve best of class service delivery for clients. The role that location play in a portfolio will emerge on the axes of the diversity of service portfolios they can deliver competitively and the spread of regions they can service optimally



NASSCOM Tholons Survey :Changing drivers of Global Delivery Network Management

- 1 Analyze drivers and decision making cycle for global delivery center expansion
- 2 Understand challenges and considerations for managing a global delivery network
- 3 Gain perspectives of future outlook and expansion plans

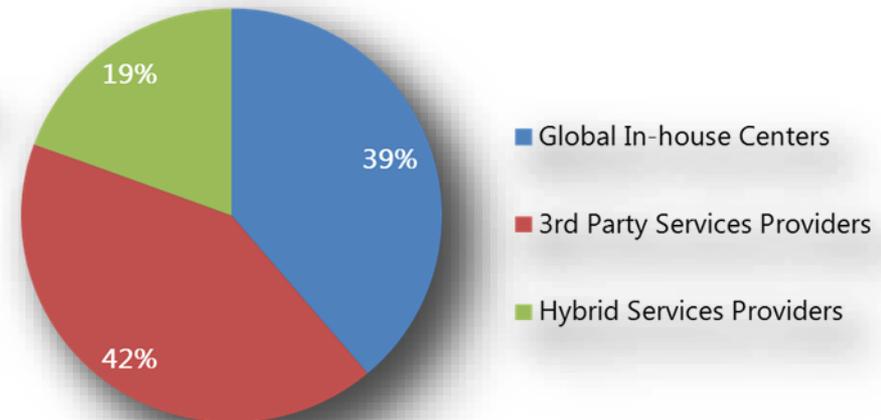
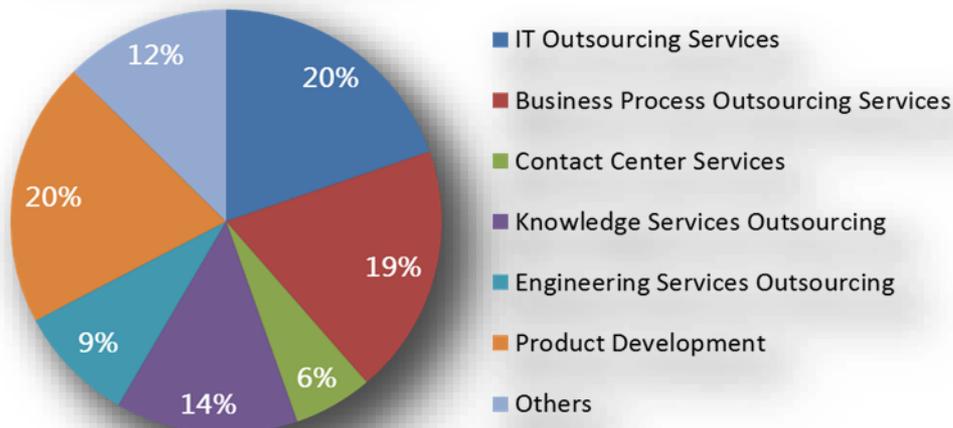
85 NASSCOM member participants

75% Respondents have a CxO profile

~40% Representation of industry export revenues

balanced Across operating models and service portfolio

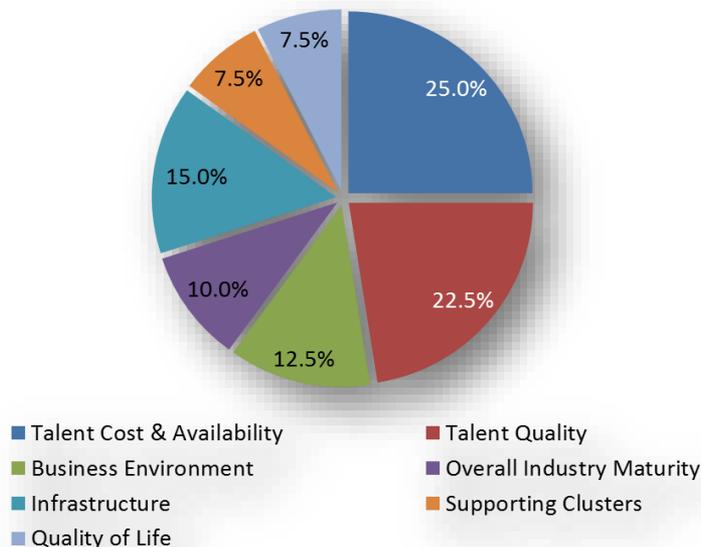
Respondent Snapshot





The survey and the research insights led to interesting findings that help us understand the future direction that locations and portfolio management will likely take:

Talent drivers continue to play a majority role in location selection



- i. Future outlook extremely bullish on India, in addition to growing interests in other near shore locations in Latin Americas and Eastern Europe
- ii. Future scale outside of India likely to be driven by market access and serving specific client needs (language, proximity etc.) for 3rd Party Service providers; GICs taking a long term view on access to global talent capabilities in order to serve parent entities outside of the traditional US and UK markets
- iii. Talent drivers continue to play a majority role in location selection; as the no. of choices of near shore and onshore locations increases, we have observed that business environment and infrastructure are starting to get greater importance than in the past
- iv. Mission critical factors for future delivery centre success, vary by operating models.; common themes being industry depth, talent development to enhance service portfolio, strengthening governance and management

The NASSCOM Tholons Services Outsourcing Atlas™ evaluate roles that locations can play in a portfolio across 5 broad service lines; and takes the first step in developing a reference-able study for member organizations to take fact based location decisions

	Transactional BPM	FAO Services	Knowledge Services	Technology Services	Engineering Services
LOCATION STARS	Bangalore	Bangalore	Bangalore	Bangalore	Bangalore
	Beijing	Bogotá	Belfast	Beijing	Beijing
	Bogotá	Buenos Aires	Chennai	Buenos Aires	Belfast
	Buenos Aires	Cebu City	Dalian (Dairen)	Bucharest	Bucharest
	Cape Town	Chengdu	Delhi (NCR)	Chengdu	Budapest
	Cebu City	Chennai	Dublin	Chennai	Buenos Aires
	Chennai	Colombo	Hyderabad	Dalian (Dairen)	Chennai
	Curitiba	Dalian (Dairen)	Kuala Lumpur	Delhi (NCR)	Delhi (NCR)
	Dalian (Dairen)	Delhi (NCR)	Manila (NCR)	Dublin	Dublin
	Delhi (NCR)	Dublin	Mexico City	Guadalajara	Hyderabad
	Ho Chi Minh City	Hyderabad	Montevideo	Guangzhou (Canton)	Kuala Lumpur
	Hyderabad	Krakow	Mumbai	Hanoi	Mexico City
	Krakow	Kuala Lumpur	Pune	Ho Chi Minh City	Moscow
	Manila (NCR)	Manila (NCR)	São Paulo	Hyderabad	Mumbai
	Mexico City	Mexico City	San Antonio, Texas	Mexico City	Novosibirsk
	Monterrey	Monterrey	Santiago	Mumbai	Prague
	Mumbai	Mumbai	San Jose	Pune	Pune
	Prague	Pune	Shanghai	São Paulo	Shanghai
	Pune	Shanghai	Singapore	Shanghai	Singapore
	San Jose	Warsaw	Toronto	Warsaw	Warsaw
WATCH LIST	Colombo	Bucharest	Beijing	Bogota	Dalian (Dairen)
	Kolkata	Budapest	Buenos Aires	Jakarta	Guangzhou (Canton)
	Guadalajara	Jaipur	Chengdu	Kolkata	Kyiv
	Jakarta	Cape Town	Krakow	Moscow	São Paulo
	Johannesburg	Medellin	Prague	Thiruvananthapuram	Sofia