

Índice AT KEARNEY 2007

sobre Destinos de Servicios Globales

Secretaría Ejecutiva

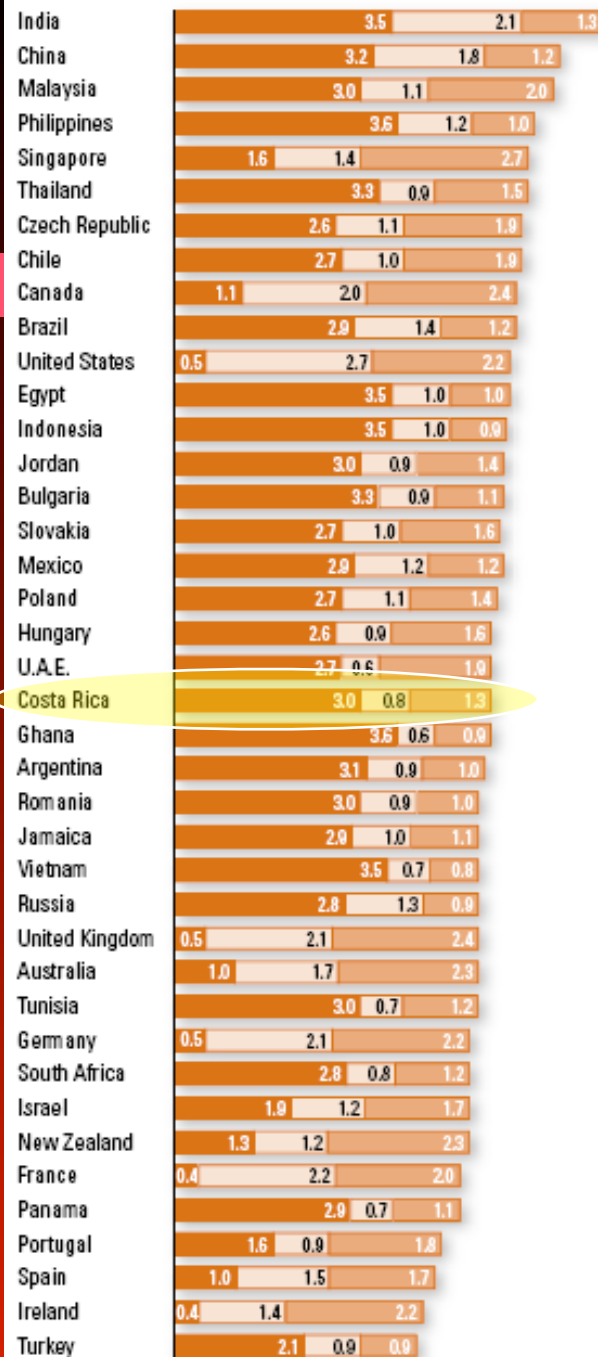
Consejo Nacional de Competitividad

Indicadores

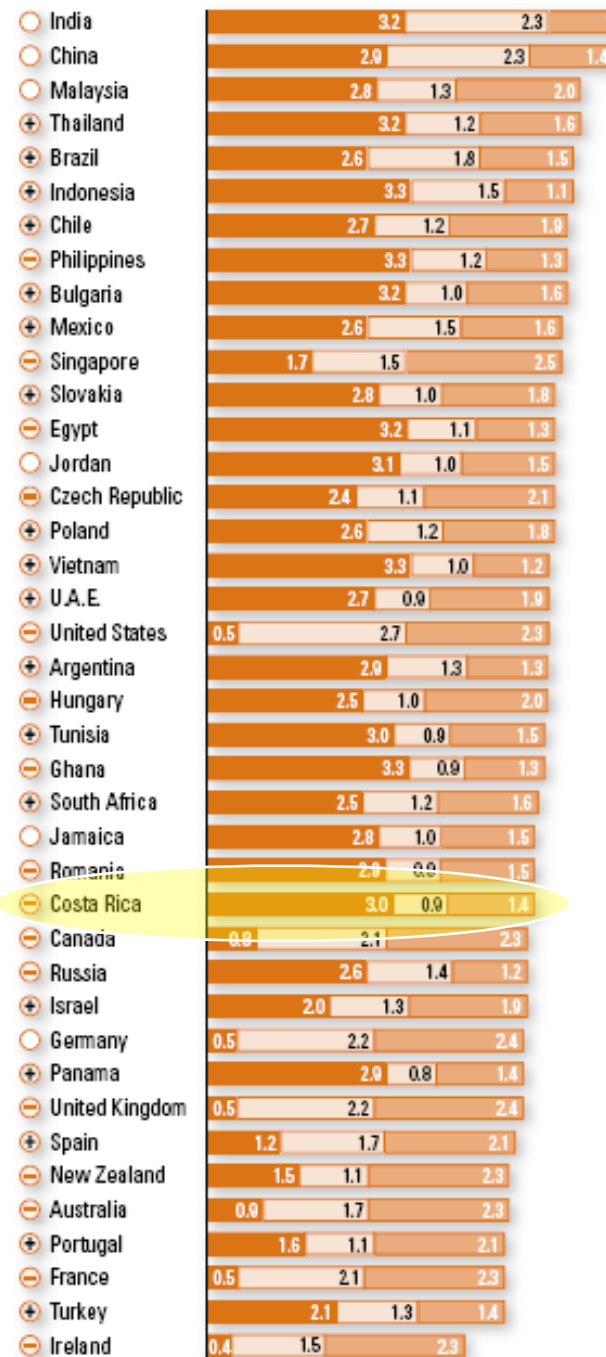
Category	Sub-categories	Metrics
Financial attractiveness (40%)	Compensation costs	<ul style="list-style-type: none"> • Average wages • Median compensation costs for relevant positions (call-center representatives, BPO analysts, IT programmers and local operations managers)
	Infrastructure costs	<ul style="list-style-type: none"> • Rental costs • Commercial electricity rates • International telecom costs • Travel to major customer destinations
	Tax and regulatory costs	<ul style="list-style-type: none"> • Relative tax burden • Corruption perception • Currency appreciation or depreciation
People and skills availability (30%)	Remote services sector experience and quality ratings	<ul style="list-style-type: none"> • Size of existing IT and BPO sectors • Contact center and IT center quality certifications • Quality ratings of management schools and IT training
	Labor force availability	<ul style="list-style-type: none"> • Total work force • University-educated work force • Work force flexibility
	Education and language	<ul style="list-style-type: none"> • Scores on standardized education and language tests
	Attrition risk	<ul style="list-style-type: none"> • Relative IT and BPO sector growth and unemployment rates
Business environment (30%)	Country environment	<ul style="list-style-type: none"> • Investor and analyst ratings of overall business and political environment • A.T. Kearney Foreign Direct Investment Confidence Index™ • Security risk • Regulatory burden and employment rigidity • Government support for the information and communications technology (ICT) sector
	Infrastructure	<ul style="list-style-type: none"> • Overall infrastructure quality • Quality of telecom, Internet, and electricity infrastructure
	Cultural exposure	<ul style="list-style-type: none"> • Personal interaction score from A.T. Kearney Globalization Index™
	Security of intellectual property (IP)	<ul style="list-style-type: none"> • Investor ratings of IP protection and ICT laws • Software piracy rates • Information security certifications

Rank	Country	Financial attractiveness	People and skills availability	Business environment	Total score
1	India	3.22	2.34	1.44	7.00
2	China	2.93	2.25	1.38	6.56
3	Malaysia	2.84	1.26	2.02	6.12
4	Thailand	3.19	1.21	1.62	6.02
5	Brazil	2.64	1.78	1.47	5.89
6	Indonesia	3.29	1.47	1.06	5.82
7	Chile	2.65	1.18	1.93	5.76
8	Philippines	3.26	1.23	1.26	5.75
9	Bulgaria	3.16	1.04	1.56	5.75
10	Mexico	2.63	1.49	1.61	5.73
11	Singapore	1.65	1.51	2.53	5.68
12	Slovakia	2.79	1.04	1.79	5.62
13	Egypt	3.22	1.14	1.25	5.61
14	Jordan	3.09	0.98	1.54	5.60
15	Estonia	2.44	0.96	2.20	5.60
16	Czech Republic	2.43	1.10	2.05	5.57
17	Latvia	2.64	0.91	2.00	5.56
18	Poland	2.59	1.17	1.79	5.54
19	Vietnam	3.33	0.99	1.22	5.54
20	United Arab Emirates	2.73	0.86	1.92	5.51
21	United States (tier two)	0.48	2.74	2.29	5.51
22	Uruguay	2.95	0.98	1.54	5.47
23	Argentina	2.91	1.30	1.26	5.47
24	Hungary	2.54	0.95	1.98	5.47
25	Mauritius	2.84	1.04	1.56	5.44
26	Tunisia	3.03	0.90	1.50	5.43
27	Ghana	3.27	0.90	1.25	5.42
28	Lithuania	2.60	0.83	1.98	5.42
29	Sri Lanka	3.18	0.96	1.22	5.36
30	Pakistan	3.23	1.00	1.11	5.34
31	South Africa	2.52	1.18	1.60	5.30
32	Jamaica	2.83	0.96	1.49	5.29
33	Romania	2.88	0.87	1.53	5.28
34	Costa Rica	3.00	0.86	1.36	5.22
35	Canada	0.77	2.09	2.30	5.16
36	Morocco	2.92	0.90	1.33	5.14
37	Russia	2.61	1.38	1.16	5.14
38	Israel	1.97	1.27	1.86	5.10
39	Senegal	3.19	0.82	1.05	5.06
40	Germany (tier two)	0.46	2.19	2.40	5.05
41	Panama	2.88	0.75	1.40	5.02

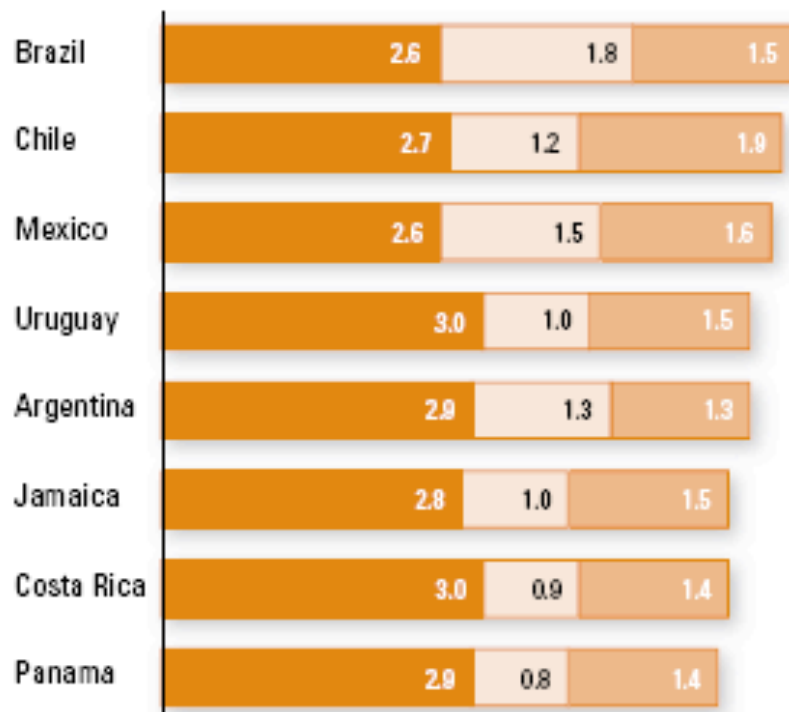
Index scores 2005



Index scores 2007



Latin American nations are the biggest gainers in this year's Index



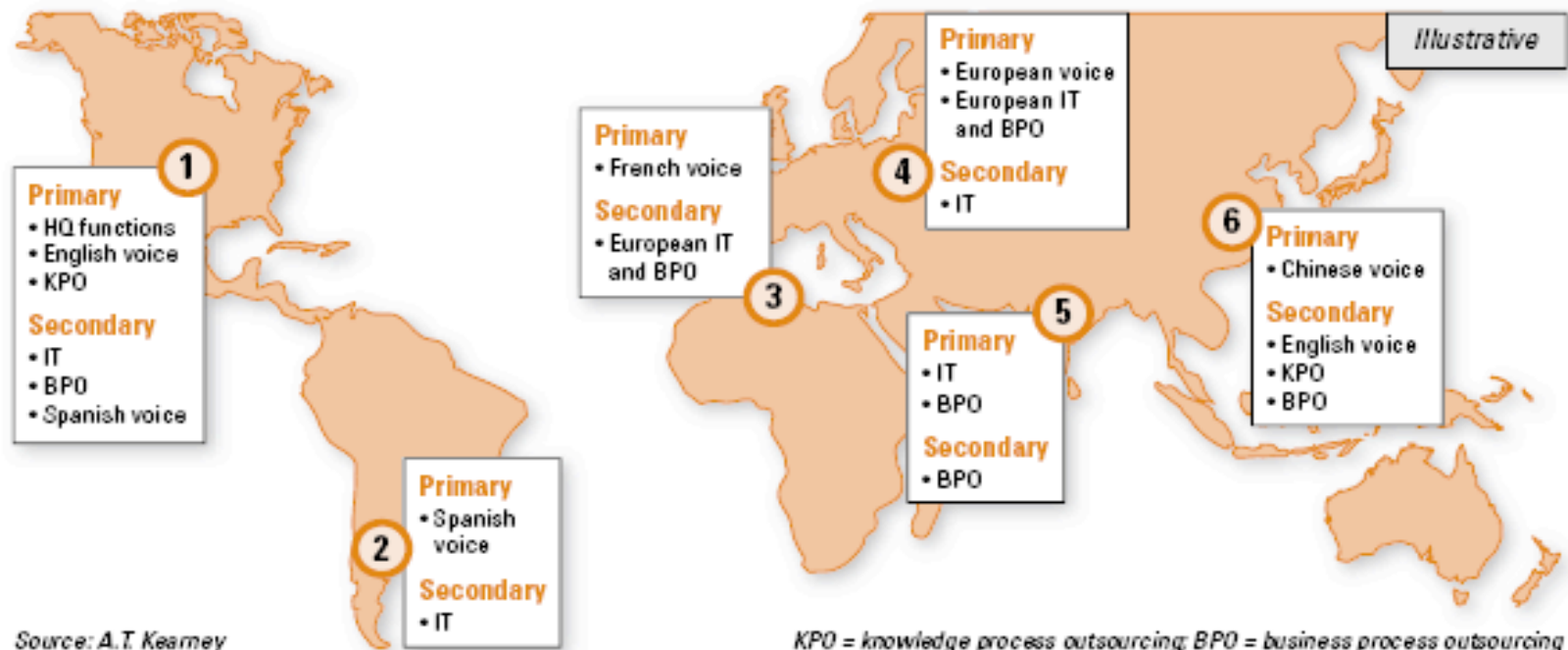
- Financial attractiveness
- People and skills availability
- Business environment



Source: A.T. Kearney

Hacia donde ir?

Long term, a footprint with a manageable number of clusters is ideal



Muchas gracias!

