

Tholons Releases 2019 Services Globalization Index™

Innovation at Scale!

NEW YORK, LONDON, BANGALORE, April 2, 2019 – Tholons, today, released the “Tholons Services Globalization Index 2019™” (TSGI), its flagship research report and ranking of the Top 50 “Digital Nations” and Top 100 “Super Cities”. Services Globalization (outsourcing) industry has been shaken by the paradigm shift and big industry leaders are grappling to align their business model to the new world of enterprise digital innovation and transformation. **Tholons Services Globalization Index (TSGI)** is published annually and is the industry’s premier ranking of the **Top 100 “Super Cities”** and **Top 50 “Digital Nations”**.

Vashista, Chairman and CEO, Tholons, says “Intelligent Automation, Machine Learning, Cognitive Computing and Applications moving to cloud is transforming businesses and the services industry. Tomorrow’s workforce will be a digital workforce at scale, consisting of digital workers and human beings working together”.

Digital is now a critical element in disrupting and transforming industries globally. Technology, business process management companies and multinational corporations need to align with the stark reality of digital innovation and transformation. Most of the services will get commoditized for the biggest leaders in services globalization like US, UK, Canada, Europe, India, Philippines, Eastern Europe and Latin America.

Clients are now seeking strategies to digitally transform their businesses, leveraging new age technology like AI, mobility, analytics, cloud, social media, block chain and cyber security. The legacy and traditional businesses need to revisit their business models in order to harness the power of such technology. Secondly, the intelligent automation of services like application management, infrastructure support, testing and business process management, is reducing or even eliminating the need for manpower. These new forces will push technology and services companies to think differently to sustain and grow.

Dawn Tiura, President & CEO of SIG - world’s largest association representing global 1000 companies says “SIG is seeing a tectonic shift in clients adopting Intelligent Automation across their businesses. Service providers and consultants need to be strategic partners to clients helping them through their digital transformation journey.”

The Globalization Industry has been knocked by digital forces. Robotics, Artificial Intelligence (AI), Social Media, Mobility, Big Data, Blockchain, Digital Supply Chain, Digital Trust, As-a-Service will continue to punch established players. The outsourcing industry has been shaken at the core; big industry leaders are aligning themselves to meet the speed and scale of digital transformation.

Kerry Hallard, President & CEO, Global Sourcing Association – UK says “A BOT is not the same as what you automated before. It is game-changing. If you are going to be a sourcing professional today, you have got to have an insatiable curiosity. You’ve got to be reading and educating yourself, if not somebody else is going to come in and do it to you.”

- **New Entrants to Top 10 Digital Nations:** UK, Singapore and Argentina are the new entrants to the top 10 Digital Nations.
- **Top 5 Super Cities:** Bangalore, Manila, Sao Paulo, Mumbai and Dublin.
- **Top 10 Super Cities New Entrants:** Toronto and Singapore.
- **New Entrants in Top 100 Super Cities:** There are few cities who have shown exemplary movement in embracing digital and being relevant to the globalization of services. These cities are Sofia, Cape Town, San Francisco, New York, London, and Sydney making in Top 100 Super Cities.
- **Future Digital Leaders:** New York, London, San Francisco, Singapore and Los Angeles are the Top 5 potential Digital Leaders.

TOP 20 SUPER CITIES 2019		
RANK 2019	RANK 2018	SUPER CITIES
1	1	Bangalore
2	2	Manila
3	8	Sao Paulo
4	3	Mumbai
5	7	Dublin
6	15	Toronto
7	4	Delhi (NCR)
8	5	Hyderabad
9	12	Singapore
10	10	Buenos Aires
11	6	Kraków
12	11	Cebu City
13	17	Chennai
14	9	Montevideo
15	20	Santiago
16	18	Pune
17	24	Johannesburg
18	13	Kuala Lumpur
19	16	Prague
20	30	Mexico City

TOP 20 DIGITAL NATIONS 2019		
RANK 2019	RANK 2018	DIGITAL NATION
1	1	India
2	3	Brazil
3	4	United States
4	6	Canada
5	2	Philippines
6	27	United Kingdom
7	7	Russia
8	5	Mexico
9	13	Singapore
10	14	Argentina
11	9	Colombia
12	12	Chile
13	8	Vietnam
14	15	Ireland
15	11	Poland
16	39	Australia
17	10	South Africa
18	23	Uruguay
19	22	Czech Republic
20	18	Indonesia

Fabrizio Opertti, Chief Trade & Investment Div, IDB says “IDB’s human capital development programs for services exports in Latin America & the Caribbean, called ‘finishing schools’, have been great drivers of the industry. IDB’s ConnectAmericas.com platform is the first social network for small & mid sized enterprises in the Americas and includes a Global Services networking community powered by digital.”

The opportunity of the growing \$2.8 Trillion technology spend to \$4.0 Trillion by accelerated transition of legacy businesses to digital is not to be missed. It is good news for innovative startups, super cities and digital nations to claim the territory. An engaged focus in digital innovation at enterprise level will lead to emergence of new leaders. These new players clearly stand a great chance to be the winners given they are not saddled with legacy and big transformational effort and cost. We feel jubilant ringing the bell to dawn of certainty, opportunity and this new found world.

Debjani Ghosh, President, NASSCOM says "IT industry is going to go through a process of Digital Transformation - talent, capabilities in new technologies and strategic partnerships are the three things that are going to pretty much shape the success."

About Tholons

THOLONS is a Global Strategic Consulting, Digital Industrial Innovation and Investment Advisory group serving Fortune 500 / Global 2000 clients. We help clients maximize returns on their innovation, digital transformation, business growth and global expansion.

Tholons advisors engage with government bodies to build compelling strategies for making countries an attractive destination for Technology, Business Process Management, Innovation and Digital.

MY SPACES, the Enterprise Innovation global network, powered by THOLONS is the global leader and platform in a collaborative ecosystem of Co-work | Co-innovate | Co-invest.

About Tholons Services Globalization Index (TSGI)

TSGI 2019 is the 14th edition since its inception in 2006 and is based on Tholons's proprietary location assessment framework, which uses both primary and secondary research. Data is collected and validated from an extensive network of industry stakeholders including enterprise buyers, service providers, governments, trade bodies and associations. Innovation / Digital, Talent, Skills & Quality, Cost, Risk & Quality of Life, Business Catalyst and Infrastructure are the key metrics used to rate and rank Super Cities and Digital Nations.

Tholons introduced innovation, startup ecosystem and digital transformation as key components to define its index for Top 50 Digital Nations and Top 100 Super Cities 2017. Tholons is excited to present its perspective on digital, and how it will change the industry, and the future of economies and growth markets. In TSGI 2018, additional digital parameters such as cybersecurity, digital skills, scale and global competitiveness were attributed. **This 2019 report** is generated with add-on parameters like - mobile phone/internet users, regulatory/compliance and digital investments to gauge the wider aspects and impact of the digital ecosystem.

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