

SCOTLAND: DELIVERING EXCELLENCE IN GLOBAL BUSINESS SERVICES



#SCOTLANDISNOW



WELCOME TO SCOTLAND

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The small country making a big impact on the global landscape.

Scotland is where you will find excellence in education, a flair for invention and a passion for research. It's a place where great minds connect to produce a dynamic environment for global business services.

You'll find us progressive and pioneering. With a track record of innovation and enterprise, we punch above our weight right across the sector.

As one of the most important centres for global business services in the UK, and with a proven track record in servicing global markets, Scotland offers stability and security for you to establish your operations here. Our world-class infrastructure, excellent connectivity and competitive costs have attracted companies such as Morgan Stanley, Sky, Capgemini and Amazon to locate in Scotland. Companies deliver a range of business functions including customer experience, finance, HR, procurement, legal services and technology development.

The shining jewel in our crown is our people; by locating in Scotland, you'll access a highly educated, skilled workforce with a strong work ethic.

Innovation is high up on our agenda too and we're proud to host a dynamic sector which promotes collaboration and active partnership between industry and academia, to develop capabilities in areas such as data, artificial intelligence and cyber security.

Beyond the office, Scotland is a land of great natural beauty and strong heritage; our warmth and generosity are world-renowned. Our friendly communities combine an exceptional quality of life with low costs of living, making the move to Scotland an attractive option for you and your employees. Our progressive government policies strive to make Scotland a fairer and better place to live and work for everyone.

We'd love you to join the many global businesses that choose to locate, operate and grow in Scotland alongside our ambitious local companies. We're here for you throughout the journey – you will be supported before, during and after you locate in Scotland.

Now is the time to invest in Scotland. So, come on in; be part of Scotland's continuing success story.



**Customer experience
and sales**



Finance and accounting



**HR, payroll
and procurement**



Legal services



Digital technologies



Analytics



Multilingual



Industry expertise





SCOTLAND'S OPPORTUNITY

Scotland is a key nearshore location for servicing the UK and Europe. Our workforce has expertise across several industries and offers a cultural affinity with customers allowing for more complex issues to be serviced.

TAKE ADVANTAGE OF OUR AI AND RPA CENTRES OF EXCELLENCE

Scotland has the talent and the academic expertise to help you develop innovative solutions for your business and customers. Our GBS sector is making significant efficiency improvements by using RPA to automate standardised processes, with the potential to make significant cost reductions.

FIND A HOME FOR YOUR CYBER SECURITY OPERATIONS

Scotland is an ideal location for state-of-the-art cyber security operations. Academic expertise, a pool of experienced cyber professionals and a supply of graduates and apprentices provide the talent you need.

ACCESS THE RIGHT TALENT FOR YOUR CUSTOMER EXPERIENCE CENTRES

Our customer services sector provides access to experienced people with in-depth knowledge of products and services across a range of industries. Here you can recruit people with the necessary language skills and affinity with your customers across the UK, Europe and further afield to provide world-class service that adds value to your business.

TRANSFORM YOUR FINANCE OPERATIONS INTO CENTRES OF EXCELLENCE

Finance centres across Scotland have transformed in recent years from delivering transactional services to providing complex finance and accounting services such as tax and treasury services. Many centres are examples of best practice within their global businesses and utilise multilingual finance talent to be regional centres of excellence for Europe.

BE PART OF A FORWARD-THINKING COMMUNITY

Scotland has ambitious policy objectives for delivering on key areas such as a low carbon economy and health and wellbeing. Here you will be able to implement corporate policies which benefit not only your business and employees but society too. From introducing flexible working policies to getting involved with local schools and communities, companies across Scotland are making a real contribution.

REASONS TO INVEST



ACCESS TO TALENT

There are over 142,000 people employed in Scotland's global business services sector, and around 76,000 in technology. Our 19 universities and higher education institutions produce over 101,000 graduates annually, and four of our universities are ranked in the world's top 250 institutions.



CHOICE OF LOCATIONS

Scotland offers a range of locations to suit your requirements. Glasgow and Edinburgh are our two biggest cities but places outside the central belt are also attractive such as Inverness in the Highlands, where Capgemini chose their base. Our excellent broadband infrastructure supports homeworking so you can get access to the best talent across the country.



COMPETITIVE COSTS

You can access quality talent at a lower cost compared to other major cities. On average, salaries and property costs can be significantly lower than London.



CONNECTED TO THE WORLD

Scotland is easily accessible by air, rail and road and offers a low-risk environment for delivering your services. We have a convenient time zone that enables workflow to pass between offices in different geographies to increase responsiveness to customers.



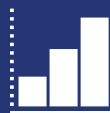
DIGITAL TRANSFORMATION

Scotland offers access to world-class tech talent and academic excellence across data, AI, blockchain, IoT and cyber security.



TRACK RECORD OF SUCCESS

Companies of all sizes and from all sectors have chosen Scotland to deliver their services, including some of the world's leading organisations like Amazon, Barclays, JP Morgan, Morgan Stanley, Sky, Tesco, Dell, Wipro and Capgemini.



GROW YOUR BUSINESS

You can service your customer base in the UK, Europe and globally from Scotland. We also have vibrant and growing sectors such as financial services, renewable energy, life sciences and healthcare.



THE RIGHT TALENT FOR YOUR BUSINESS

**Want to attract and retain the right talent to maintain your competitive edge?
Come in – we've been waiting for you.**

Scotland offers access to a high-quality, experienced and diverse workforce across a range of business functions including digital technologies, customer experience, sales, tech support, finance, HR, procurement, payroll and legal services. Your company will benefit from hard-working and dependable staff, creating stability and reassurance for your business.



Over 142,000 people are employed in Scotland's global business services sector with over 105,000 employed in customer experience centres and over 35,000 in shared service centres.



You can recruit talent fluent in most languages and with experience across many sectors and functions. One in six global business services operations in Scotland deliver multilingual services and some in over 30 different languages.



You can access expertise in delivering services across financial services, communications, healthcare, utilities and the public sector.



Scotland offers over 100 types of apprenticeships that enable businesses to develop a robust recruitment and talent pipeline from school to senior personnel. Over 12,000 Scottish-based businesses are already benefitting from apprentices honing skills such as customer service, accountancy and technology, in turn boosting productivity, morale, staff retention and quality of service.



Scotland has a thriving digital technology sector with around **76,000 people employed and expertise in data, AI and cyber.**



Our workforce is the best educated in Europe with around 50% of people obtaining a tertiary qualification or higher.



With over 20,000 university and HEI graduates per year from business-related courses and around 15,000 in computer sciences and technology, you can be assured of a steady stream of talent to support your business. Did you know Scotland also has the highest ratio of foreign to home students in the UK with around **74,000** outside the UK choosing to study here?



Our skills academies are established across key sectors, to ensure Scotland is prepared and equipped to produce the skills of tomorrow. Innovative programmes deliver acclaimed intensive courses in data analysis and software development.

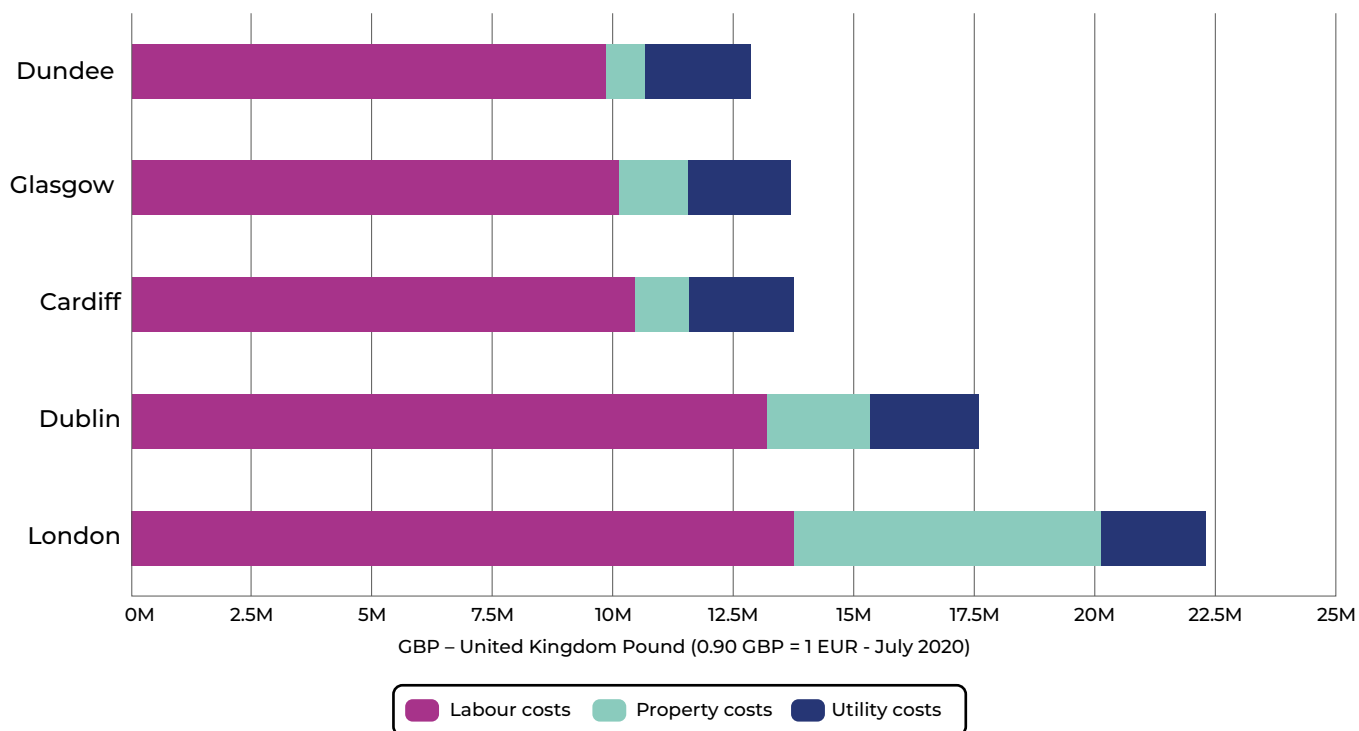


Our higher education institutions produce over **3,700 language graduates each year.**

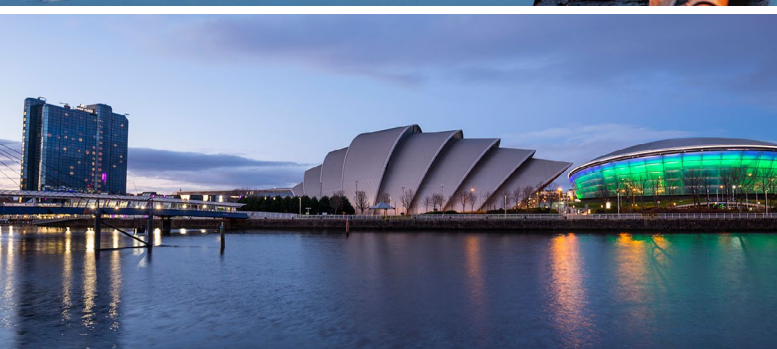
COMPETITIVE COST BASE

In Scotland, you'll have access to world-class talent and infrastructure at a competitive cost.

Dundee and Glasgow have lower operating costs compared to London. Dundee also represents outstanding value in property while Glasgow has attractive labour costs compared to major competitors.



Source: FDI Benchmark. Total operating costs (per annum) based on operating a 350-seat customer support centre.



DIGITAL TECHNOLOGIES AND INNOVATION

Scotland is at the forefront of the digital revolution in global business services. We have a rich history of innovation and companies can attract world-class expertise and work in collaboration with our world-leading institutions.

Our technology sector is flourishing, with around 76,000 people working across a range of areas. From application development, cyber security and data analytics, to robotic process automation and AI, you can be assured that Scotland has the skills and expertise to support you.

Barclays, JP Morgan, Amazon, Sky and Morgan Stanley are just a few examples of some of the leading companies which have already established technology centres in Scotland.

This wealth of experience within the technology sector, along with a thriving fintech ecosystem, provides companies big and small with partnering and investment opportunities. It has also created an ideal environment for successful start-ups, which are involved in developing new and transformative technologies that have increased our international reputation. Skyscanner is a prime example, having flourished from a Scottish start-up to an internationally renowned brand.

We have many examples of innovative partnerships drawing on world-leading research and expertise to develop, design and deploy new processes and technologies across the sector.



Data

Our data research strength comes from a skilled workforce, research-driven universities, advanced digital infrastructure and an established network of enabling technology companies. This can benefit your company both in terms of the emerging cluster of associated early stage technology businesses and for collaborative research with recognised global industry leaders.



Blockchain

An increasing number of large firms and start-ups are looking at blockchain and its applications. Our Blockchain Technology Lab at the University of Edinburgh focuses on industry inspired challenges, studying topics such as cryptography, regulation and compliance, business and law.



Cyber Security

Abertay University in Dundee was the world's first university to offer an ethical hacking degree and is leading on the creation of the CyberQuarter, a research and development centre. The University of Edinburgh is also a UK Government approved Centre of Excellence for cyber security research.



Artificial Intelligence

Amazon selected Edinburgh as the location of its first global development centre outside of North America, where machine learning and NLP talent helps to develop new innovative products.

A GREAT CHOICE OF LOCATIONS

Scotland offers an array of location options where you will find high-quality talent. Scottish Development International (SDI) will help you identify the most suitable location for your investment and connect you with local agencies and institutions.

As well as having a choice of locations throughout Scotland, there is an opportunity to recruit for homeworkers. Many companies have looked to Scotland for homeworking projects which can provide experienced talent and provide flexibility in response to increased demand of services.

1. Highlands & Islands (HIE)

The region covers a diverse geography. It has become known for delivering high-value activities with Atos and Capgemini having development centres.

Homeworking projects can also be supported by the talented and experienced population.

2. North and South Lanarkshire

The region offers access to large local talent pools with experience across customer service, financial services and utilities.

Major employers include HSBC, First Direct, Unisono, Ascensos, Sitel and BMI Healthcare.

3. Inverclyde and Ayrshire

The region offers access to a local talent pool across customer experience, HR and payroll.

It is home to major employers including RBS, EE, Cigna, Webhelp, Teleperformance and Concentrix.

4. Glasgow

Glasgow is Scotland's largest centre for Global Business Services with specialisms across all parts of the sector.

It is home to major centres for JP Morgan, Morgan Stanley, Barclays, Teleperformance, Capita, Atos, CGI, Cognizant and many more.

5. South of Scotland

The region offers access to a local talent pool with expertise in customer services.

Major employers include HGS, CGI and Sykes.

6. Tayside

The area offers access to talent across customer experience, finance, technology development and cyber security.

It is home to BT, Tesco plc, Aviva, Dover Corporation, NCR and FNZ.

7. Fife

The region is home to several financial services companies and BPOs. Customer services, finance and technology operations are delivered from the region.

It's home to Sainsbury's Bank, Nationwide, Sky plc, Pay Wizard, Atos and Vericall.

8. Edinburgh

Edinburgh has a range of global business services functions with a focus on financial services and technology.

It's home to major centres for Amazon, RBS, ABRDN, Aegon UK, Sykes, Computershare and many more.





A SUPPORTIVE BUSINESS ENVIRONMENT

Scotland: small enough to care, big enough to matter.

Come to Scotland and you'll become part of one of the world's most supportive and accessible business environments for global business services.

You can call on a network of specialist advisors on stand-by to support you as you settle in Scotland. Most of the world's large professional services firms have offices in Scotland and you can access Scottish, UK and international law firms, offering business sector expertise 'on the ground'.

You'll also be supported by professional and industry bodies which make valuable connections between companies and the relevant professions in Scotland.

CCA GLOBAL

Headquartered in Glasgow, CCA Global is the independent professional body for customer service experience in the UK. They lead the way as a trusted source of research, analysis and expertise, as well as working with operators, BPOs and shared service providers and vendors.

SCOTLANDIS

ScotlandIS represents the digital technology industry in Scotland, from multinationals with a Scottish base to start-ups. The trade body has strong links across industry, helping companies to network and build their supply chains via access to innovative companies. ScotlandIS also gives members a voice, working with government to shape policy on issues affecting the industry, such as skills, connectivity and infrastructure improvements. They employ data and cyber cluster managers to provide focus on connecting and supporting companies within these areas.

SHARED SERVICES FORUM SCOTLAND

Shared Services Forum Scotland is a membership community for knowledge sharing, thought leadership and best practice. Here, you'll find like minds with a willingness to collaborate, exchange ideas and discuss the latest industry trends and issues.

THRIVE IN SCOTLAND WITH ONGOING BUSINESS SUPPORT

Connected business support from Scotland's enterprise agencies will ensure that you are supported before, during and after you locate in Scotland.

Locating to a new area can be a daunting task but we can make it quick and easy for your business to settle in Scotland.

We'll be with you every step of the way and can assist you with:



PROPERTY SEARCHES AND ADVICE

We can help you find the right office and lab facilities fast, and get help with feasibility studies.



FUNDING, GRANTS AND SUPPORT

Your business could benefit from a range of attractive incentives to help you upskill your staff, develop new products and services and access growth capital.



CONNECTIONS

We can introduce you to our university and supply-chain contacts, enabling you to access cutting-edge research and exceptional talent.



TALENT

We will listen to your business, giving you the opportunity to influence skills, education and training provision to maximise your human capital.



PROFESSIONAL ADVICE

We can connect you to expert advice on pressing issues like visas and contracts, to help you get up and running in Scotland.

And the support doesn't end when you make the move. We are committed to your growth in Scotland, by taking the time to understand your needs now and in the future. We have the tools to take your business to the next level, whether it's identifying investment, developing your business strategy, upskilling your staff or improving your business processes.

CONNECTED TO THE WORLD

INVEST IN SCOTLAND AND YOU'LL BE CLOSE TO SOME HUGE MARKETS. WHETHER YOU'RE HEADING TO LONDON, EUROPE OR THE REST OF THE WORLD, SCOTLAND IS WELL-CONNECTED FOR BUSINESS TRAVEL.



6 AIRPORTS connecting Europe, Middle East and North America



FAST AND FREQUENT rail links to all parts of the UK



Daily **DIRECT FLIGHTS TO 150 DESTINATIONS** worldwide



130 FLIGHTS PER DAY TO LONDON with a 1hr flight time *



44 MINS journey time **BETWEEN GLASGOW AND EDINBURGH** by train

Our **INTERNET OF THINGS NETWORK** has reached almost **100 PER CENT COVERAGE** in Glasgow and Edinburgh, offering businesses access to smart technologies.

95 PER CENT FIBRE BROADBAND COVERAGE, including all major cities in Scotland.

Our future-proofed fibre network makes Scotland one of the **BEST-CONNECTED PLACES** anywhere in Europe.

Scotland is ranked among the **TOP 30 COUNTRIES** and cities for digital connectivity.



GET IN TOUCH

WE'D LOVE TO WELCOME YOU

We will make it quick and easy for your business to settle in Scotland so we will help you to identify premises, academic partners and investment opportunities, recruit staff and access funding to upskill your staff, develop new products and services and access growth capital.

Working together, everyone from national government and local authorities to universities and advisors will make the connections which ensure your investment goes smoothly, so that you can focus on growing your business.

To find out why **#SCOTLANDISNOW** for your company or to find out more about how you can experience Scotland for yourself, get in touch and we will be happy to help.

NOW IS THE TIME TO INVEST IN SCOTLAND.
WE'D LOVE TO WELCOME YOU.



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