



# Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium

Human Resources Outsourcing (HRO)  
Market Report: September 2015 – Preview Deck

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## ▶ Transaction Intelligence

## Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

## Subscription information

- The full report is included in the following subscription(s)
  - **Human Resources Outsourcing (HRO)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**



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<sup>1</sup> Banking, financial services, and insurance

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# Everest Group's MCPO research is based on proprietary information from multiple sources

- 1
  - Everest Group's proprietary database of over **750 MCPO deals**
  - The database tracks the following elements of each MCPO deal:
    - Buyer details including industry, location, and headquarters
    - Deal details including TCV, ACV, term, start date, buyer employees served, pay slips processed, and the primary pricing structure
    - Scope of process coverage and geographic coverage (in terms of number of countries covered within each region)
    - Technology ownership and maintenance
    - Global sourcing
- 2
  - Everest Group's proprietary database of **operational capability of over 16 MCPO service providers**
  - The database tracks the following capability elements for each service provider:
    - Major MCPO clients and recent wins
    - Overall MCPO revenue, total clients, pay slips processed, and buyer employees served
    - Geographic coverage by employees and split of clients by industry, number of countries, and employee-size
    - MCPO services suite, delivery locations, and level of offshoring
    - Technology offerings within MCPO
    - Overall country coverage and partnerships
- 3
  - Ongoing interaction with buyers, both as a part of syndicated research relationships as well as custom research engagements

## Service providers covered in detail in the analyses



### The analyses in this report are presented on two levels:

- Comprehensive market analysis that highlights the overall market composition/dynamics
- The current market trends based on deal activities in the last three years

The sample size varies for different analyses based on the deal detail availability

1 Based on pre-acquisition 2014 data

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected is only presented back to the industry in an aggregated fashion

# ABC (page 1 of 5)

## MCPO service capability and strategy

**Company profile:** ABC is a focused MCPO provider specializing in technology and services for global workforce management and payroll delivery.

**Headquarters:** XX, YY

**Leadership:** XYZ, CEO

**Website:** [www.xx.com](http://www.xx.com)

Offshore <sup>1</sup>	Nearshore <sup>1</sup>	Onshore
XX	XX	XX
Total MCPO delivery FTEs = XX		

### Recent MCPO-related developments/announcements

- December 2014: XX
- June 2014: XX
- March 2014: XX

### Key partners

- XX
- XX

### Current MCPO market segment focus

- Buyer segment: xx
- Geography: xx

### Functional capabilities within key MCPO areas across regions

■ Coverage – self    
 ■ Through partners    
 ■ Not offered

Regions	North America	EMEA	Asia Pacific	Latin America
Payroll preparation	✓	✓	✓	✓
Payroll calculation	✓	✓	✓	✓
Payroll distribution	✓	✓	✓	✓
Reconciliation	✓	✓	✓	✓
Third-party payments	✓	✓	✓	✓
Payroll tax reporting	✓	✓	✓	✓
Vendor management	✓	✓	✓	✓
Contact center	✓	✓	✓	✓
Time and attendance	✓	✓	✓	✓
Expatriate payroll	✓	✓	✓	✓

### Technology solution(s) offered

Technology model	Offered	Name/details
Proprietary-platform model	✓	XX
Aggregated model		
Integrated-hybrid model		

1 FTEs in offshore (India, China, and Southeast Asia) or nearshore (Eastern Europe and Latin America) locations and delivering services to North America, Western Europe, Singapore, Australia, or New Zealand

Source: Everest Group (2015)

# ABC (page 2 of 5)

## MCPO client portfolio

**MCPO experience**

- Total number of current MCPO clients: XX
- Annual number of pay slips processed: XX

**Major MCPO clients**

XX

XX

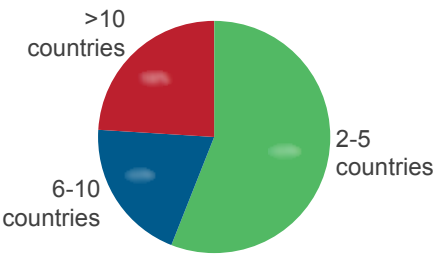
XX

XX

XX

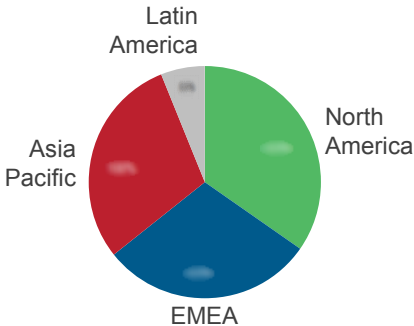
**MCPO deal spread by number of countries in scope**

100% = XX deals



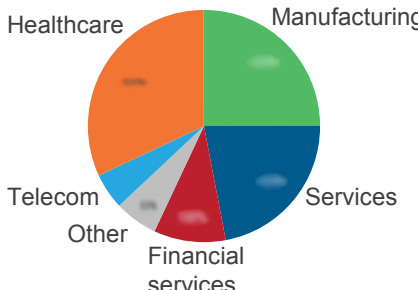
**Split of pay slips processed by geography**

100% = XX pay slips



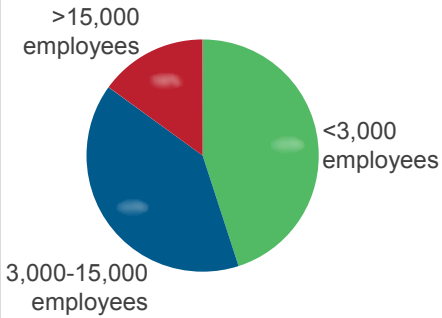
**Split of MCPO clients by industry**

100% = XX clients



**MCPO deal spread by employees covered**

100% = XX deals

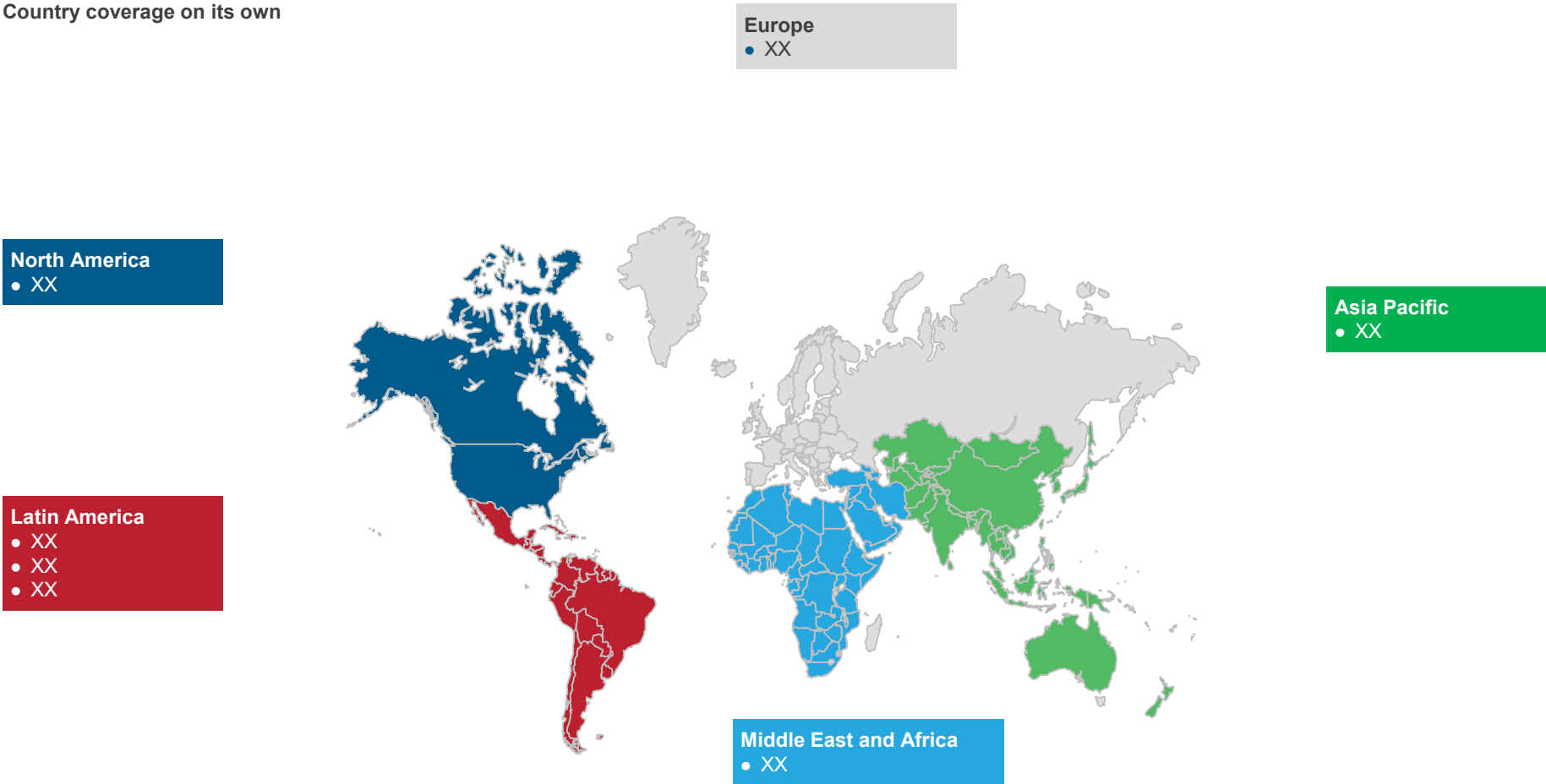


Source: Everest Group (2015)

# ABC (page 3 of 5)

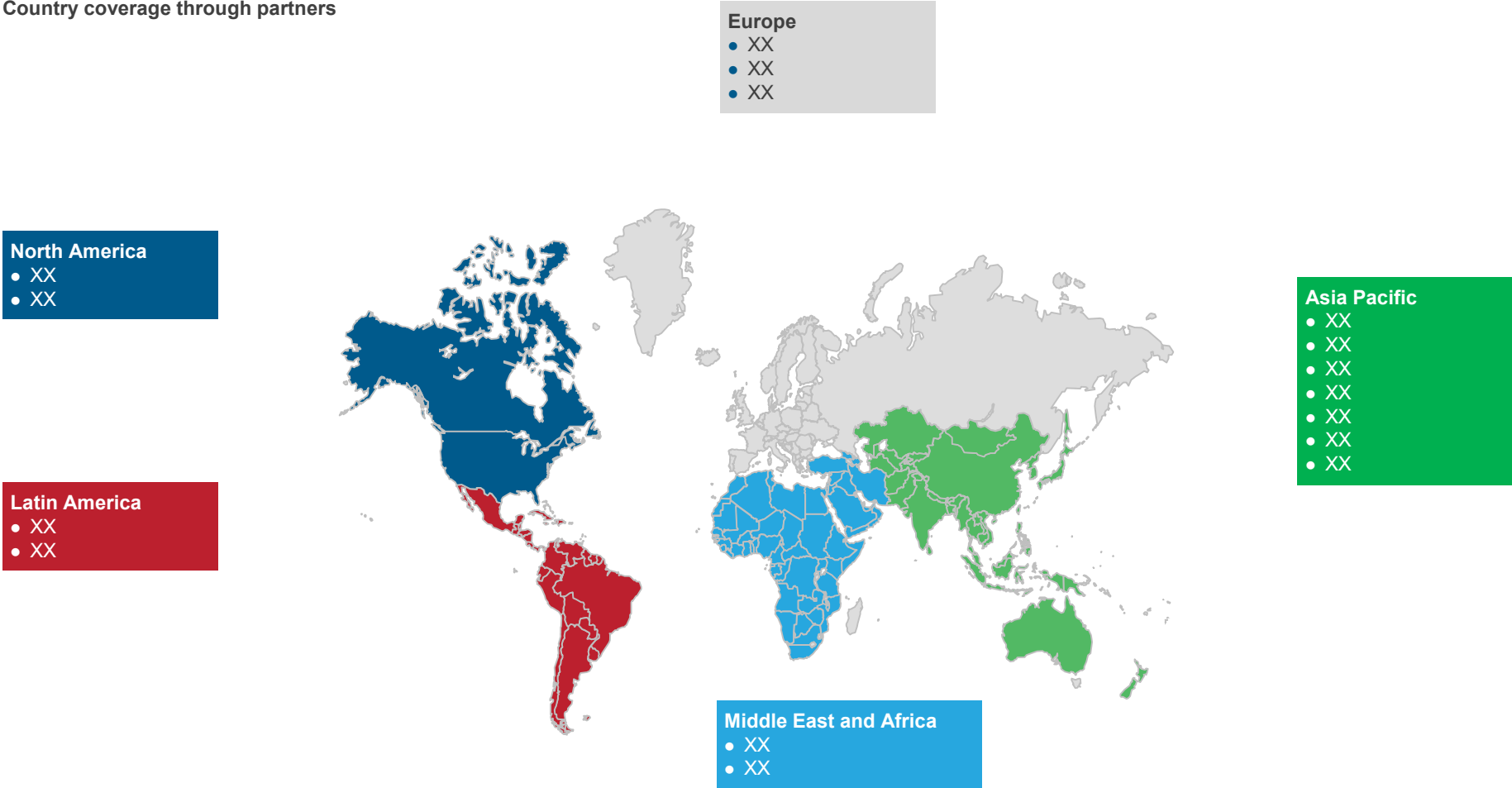
## MCPO country coverage by service provider on its own

Country coverage on its own



## MCPO country coverage through in-country partners

Country coverage through partners

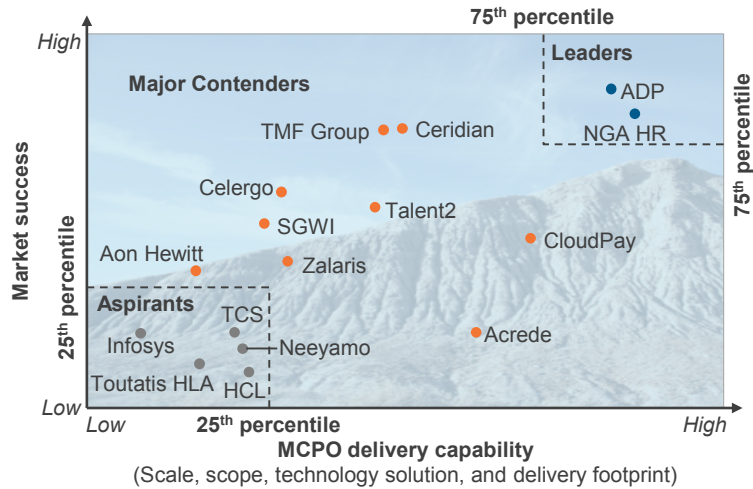




# ABC (page 5 of 5)

## Everest Group assessment

ABC is a Major Contender on Everest Group's PEAK Matrix for MCPO



### Overall remarks

- XX
- XX
- XX
- XX
- XX
- XX

### Delivery capability assessment

● High ○ Low

Assessment dimension	Rating	Remarks
Scale	○	XX
Scope	○	XX
Technology capability	●	XX
Delivery footprint	○	XX
<b>Overall</b>	○	

### Overall market success

Overall MCPO market share Percentage

2014



Source: Everest Group (2015)

# HRO research calendar

Published
  Current

Topic	Release date
MPHRO – Service Provider Profile Compendium 2014 .....	November 2014
Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2015 .....	November 2014
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2015 .....	March 2015
Reinventing Business Process Services (BPS) – Leveraging Technology to Deliver on New Expectations .....	March 2015
Rise of HR Outsourcing in Asia Pacific: Enabling HR to be Strategic .....	April 2015
Multi-Country Payroll Outsourcing (MCPO) – On the Verge of a Quantum Leap .....	June 2015
Technology in BPS –Service Provider Compendium 2015 .....	June 2015
Technology in Business Process Services (BPS) – The Pecking Order .....	August 2015
Multi-Process Human Resources Outsourcing (MPHRO) – Annual Report 2015 .....	September 2015
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2015 .....	September 2015
Benefits Administration Outsourcing (BAO) – Annual Report 2015 .....	Q3 2015
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix Assessment 2015 .....	Q3 2015
Benefits Administration Outsourcing (BAO) – Service Provider Landscape with PEAK Matrix Assessment 2015 .....	Q4 2015
Global HR Trends Handbook 2015 – Innovation, technology, outsourcing, and vendors .....	Q4 2015
MPHRO – Service Provider Profile Compendium 2015 .....	Q4 2015

# Additional HRO research references

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The following documents are recommended for additional insight into the topic covered in this report. The recommended documents provide either additional details on the topic or complementary content that may be of interest:

- 1. Multi-Country Payroll Outsourcing (MCPO) Annual Report 2015 – On the Verge of a Quantum Leap** ([EGR-2015-3-R-1441](#)); 2015. This report provides comprehensive coverage of the MCPO market and analyzes it across various dimensions such as market overview & key regional trends, buyer adoption & solution trends, and service provider landscape
- 2. Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2015** ([EGR-2015-3-R-1396](#)); 2015. This report gives an overview of the market and analyzes how the service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix, each of the 16 MCPO service providers are segmented into Leaders, Major Contenders, and Emerging Players. Additionally, this report provides key insights on the individual PEAK Matrix dimensions as well as service provider assessment and remarks about each of these providers
- 3. Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2014** ([EGR-2014-3-R-1192](#)); 2014. This report gives an overview of the provider landscape and analyzes how the service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix, each of the 18 MPHRO service providers are segmented into Leaders, Major Contenders, and Emerging Players. Additionally, this report identifies the 2014 MPHRO Star Performers and provides key insights on individual PEAK Matrix dimensions

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## About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at [www.everestgrp.com](http://www.everestgrp.com) and [research.everestgrp.com](http://research.everestgrp.com).

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