Services Procurement – Service Provider Landscape with PEAK Matrix™ Assessment 2018

Managed Service Provider (MSP)
Market Report – December 2018: Complimentary Abstract / Table of Contents

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MATRIX™

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Membership information

- This report is included in the following research program(s)
  – **Managed Service Provider (MSP)**
- **If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com, unitedkingdom@everestgrp.com, or india@everestgrp.com**

More about membership

In addition to a suite of published research, a membership may include

- Price book
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- Workshops

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

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Everest Group's services procurement research is based on three key sources of proprietary information

1
- Everest Group's proprietary database of over **800 MSP deals** (updated annually)
- The database tracks the following elements of each MSP deal:
  - Buyer details including industry, size, location, and signing region
  - Deal details including ACV, term, start date, spend managed, primary pricing structure, process coverage, and geographic coverage (at country level)
  - Technology ownership and maintenance
  - Global sourcing

2
- Everest Group's proprietary database of **operational capability of 14 MSP service providers** (updated annually)
- The database tracks the following capability elements for each service provider:
  - Services procurement managed spend
  - Services procurement clients and service suite
  - Recent services procurement-related developments (investments and partnerships)
  - Services procurement spend split by geography and category
  - Services procurement technologies leveraged
  - Services procurement process coverage

3
- Ongoing buyer surveys and interactions
  - Everest Group's **executive interviews and data collection** from **MSP buyers**
  - The data contains the following detailed buyer perspective about MSP deals:
    - Drivers for adopting MSP and buyer-provider relationships
    - The level of buyer satisfaction and the underlying reasons

Service providers covered in detail in the analysis

AgileOne • ALLEGIS GLOBAL SOLUTIONS • Brainnet • GRI • guidant global • HAYS Talent Solutions Intelligent Resourcing • HCMWORKS • KELLYOCG • pontoon • PRO Unlimited • randstad sourceright • TAPFIN ManpowerGroup Solutions • VOLT Consulting Group • zerochaos

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The analysis in this report is presented at two levels:
- Overall market analysis that highlights the market composition/dynamics
- The current market trends based on deal activities in the last five years

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

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Overview and abbreviated summary of key messages

This report examines the services procurement provider landscape market. It provides a deep-dive analysis of how the service providers shape up in terms of their market impact, and vision & capability. Based on the comprehensive Everest Group PEAK Matrix, 14 services procurement providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group's remarks on each service provider's strengths and areas of improvement.

Some of the findings in this report, among others, are:

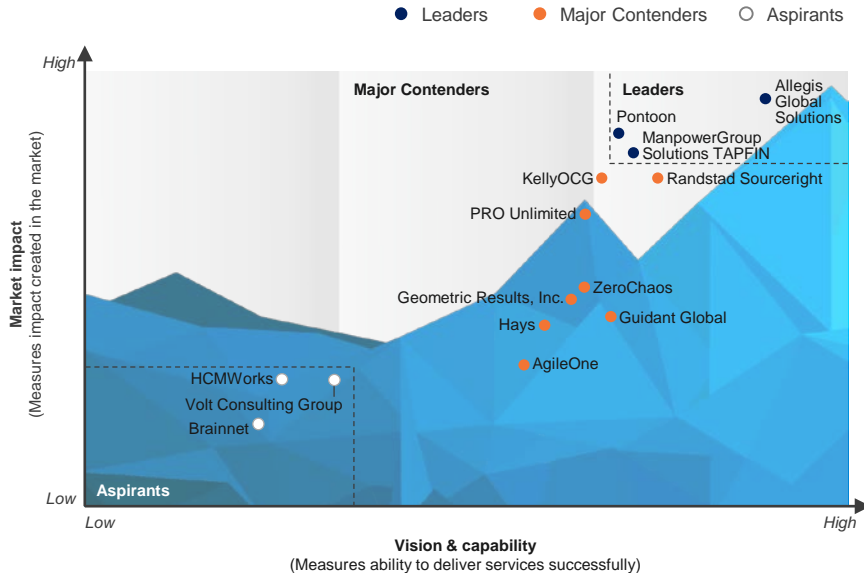**Services procurement PEAK Matrix 2018**

- Everest Group classifies services procurement service providers based on the Everest Group PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 14 established services procurement service providers evaluated are segmented into three categories (in alphabetical order within each category):
  - **Leaders:** Allegis Global Solutions, ManpowerGroup Solutions TAPFIN, and Pontoon
  - **Major Contenders:** AgileOne, Geometric Results, Inc., Guidant Global, Hays, KellyOCG, PRO Unlimited, Randstad Sourceright, and ZeroChaos
  - **Aspirants:** Brainnet, HCMWorks, and Volt Consulting Group

Service procurement service provider commentary

- Everest Group delineates each of the 14 service providers' strengths and areas of improvement
- The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

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This study offers three distinct chapters providing a deep dive into key aspects of the services procurement market; below are three charts to illustrate the depth of the report

Everest Group PEAK Matrix™ for Services Procurement 2018

Legend: ● Leaders ● Major Contenders ○ Aspirants

Major Contenders

Leaders

- Allegis Global Solutions
- Pontoon
- ManpowerGroup Solutions TAPFIN
- KellyOCG
- Randstad Sourceright
- PRO Unlimited
- Geometric Results, Inc.
- ZeroChaos
- Hays
- Guidant Global
- AgileOne
- HCMWorks
- Volt Consulting Group
- Brainnet

Aspirants

Y-axis: Market impact (Measures impact created in the market) — Low to High

X-axis: Vision & capability (Measures ability to deliver services successfully) — Low to High

Note 1: Amongst Leaders, Pontoon did not participate in the study. Amongst Aspirants and Major Contenders, Guidant Global, KellyOCG, Hays and Randstad Sourceright participated. For other providers, inputs are based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage & public disclosures, and interaction with buyers

Note 2: For a detailed service provider profile, please refer to the MSP – Service Provider Profile Compendium 2018 report

Source: Everest Group (2018)

Capability assessment

Measure of capability: ● High ◔ Low

Service provider	Market impact			Vision & capability				
	Market adoption	Portfolio mix	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1	◔	◔	◑	◔	◔	◑	◑	◑
Service provider 2	◔	◑	◑	◔	◑	●	●	◑
Service provider 3	◔	◑	◑	●	◑	◑	◑	◑
Service provider 4	◔	◑	◑	●	◑	●	◑	◑
Service provider 5	◔	◑	◑	◑	◑	◑	◑	◑
Service provider 6	◔	◑	◑	◑	◔	◑	◑	◑
Service provider 7	◑	◑	◑	◑	◑	●	◑	◑
Service provider 8	◑	◔	◑	◑	◑	◑	◑	◑
Service provider 9	◔	◑	◑	◔	◔	◑	◑	◑

Everest Group's remarks on service providers

Measure of capability: ● High ◔ Low

Market impact			Vision & capability				
Market adoption	Portfolio mix	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
◔	◔	●	●	◔	◑	◑	●

Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

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Research calendar – Managed Service Provider (MSP)

| ■ Published | ■ Planned | ⬚ Current release |

Flagship MSP reports	Release date
Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2017	September 2017
Managed Service Provider (MSP) Service Provider Profile Compendium 2017	October 2017
Managed Service Provider (MSP) Annual Report 2018 – Towards the Next Frontier – Boldly Going Where Few Have Gone Before	December 2017
Managed Service Provider (MSP) - Service Provider Landscape with PEAK Matrix™ Assessment 2018 – Asia Pacific	December 2017
Managed Service Provider (MSP) - Buyer Report 2018	August 2018
Managed Service Provider (MSP) - Service Provider Landscape with PEAK Matrix™ Assessment 2018	September 2018
Services Procurement – Service Provider Landscape with PEAK Matrix™ Assessment 2018	**December 2018**
Managed Service Provider (MSP) Annual Report 2019	Q4 2018

Thematic MSP reports	
Digital Technologies: The Next Frontier in Talent Acquisition	December 2017
Managed Service Provider (MSP): A Peek into the Buyer's Mind – Continuous Innovation is the Key to Buyer Delight	February 2017
Reimagining Talent Acquisition in a Digital-First Era	March 2018
Startups Redefining Talent Acquisition (TA) – Trailblazers	October 2018
The Clash of MSP and PO	Q1 2019

Note: For a list of all of our published MSP reports, please refer to our website page

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Additional MSP research recommendations

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

1. **Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2018** (EGR-2018-25-R-2775); 2018. This report examines the dynamics of the MSP service provider landscape and its impact on the MSP market. Based on the comprehensive Everest Group PEAK Matrix, each of the MSP service providers are segmented into Leaders, Major Contenders, and Aspirants.
The report also provides key insights into the capabilities of various service providers. It will assist key stakeholders (service providers, buyers, and technology providers) understand the current state of the regional MSP service provider landscape

2. **Managed Service Provider (MSP): A Peek into the Buyer's Mind – Digital and Futuristic Outlook is the Key to Buyer Delight** (EGR-2018-25-R-2753); 2018. This report aims to provide an insight into the key factors driving MSP adoption among buyers, in addition to providing an overview of the buyers' perception of aggregate service provider performance. The analysis in this report is presented at three levels: key factors driving MSP adoption among buyers, MSP provider performance, and evolving buyer requirements

3. **Reimagining Talent Acquisition in a Digital-First Era** (EGR-2018-26-R-2564); 2018. The global Talent Acquisition (TA) industry is undergoing a tremendous change, driven by an influx of tools and technologies built on the emerging digital technology landscape. "Reimagining Talent Acquisition in a Digital-First Era" is the second of a three-part series of reports outlining Everest Group's take on the impact of emerging digital technologies in the TA space. This paper is essentially a deep dive into the digitalization potential of various TA processes leveraging the next-generation technology levers

For more information on this and other research published by Everest Group, please contact us:

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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 empower 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.

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