



Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019

Human Resources Outsourcing (HRO)

Market Report – January 2019: Complimentary Abstract / Table of Contents

Our research offerings for global services

▶ Market Vista™

Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

▶ Application Services

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▶ BPS | Healthcare & Life Sciences

▶ BPS | Insurance

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▶ PricePoint™

▶ Procurement

▶ Recruitment & Talent Acquisition

▶ Service Optimization Technologies

More about membership

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

- Price book
- Accelerators™
- Data cuts
- Analyst access
- Virtual Roundtables
- 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

Membership information

- This report is included in the following research program(s)
 - **Human Resources Outsourcing (HRO)**
- 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

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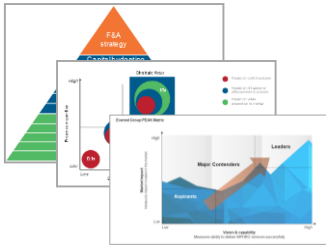
Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

1

Robust definitions and frameworks

(Function-specific pyramids, Total value equation, PEAK Matrix, and market maturity)



2

Primary sources of information

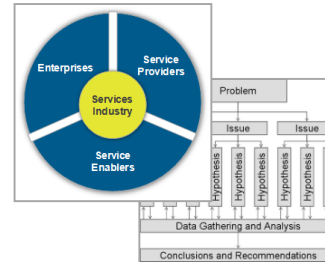
(Annual contractual and operational RFIs, service provider briefings & buyer interviews, and web-based surveys)



3

Diverse set of market touchpoints

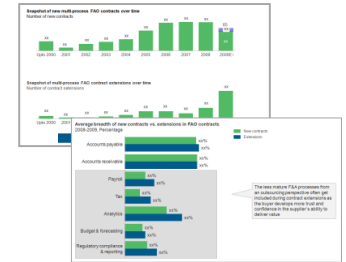
(Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership)



4

Fact-based research

(Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers)



- Proprietary contractual database of 1,400+ MPHRO contracts (updated annually)
- Year-round tracking of 20+ MPHRO service providers
- Large repository of existing research in HRO
- Dedicated team for multiple areas within HRO research, spread over two continents
- Over 20 years' experience of advising clients on HRO-related decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

This report is based on two key sources of proprietary information

- Everest Group's proprietary database of **1400+ MPHRO deals** (updated annually)
- The database tracks the following elements of each MPHRO deal:
 - Buyer details including industry, location, and signing region
 - Deal details including TCV, ACV, contract term, start date, buyer employees served, and primary pricing structure
 - Scope: Process coverage and geographic coverage (employees covered by each region)
 - Technology ownership and maintenance
 - Global sourcing

- Proprietary database of 20+ MPHRO service providers (updated annually)
- The database tracks the following for each service provider:
 - Revenue and number of FTEs
 - Revenue split by region
 - Number of clients and buyer employees
 - Location and size of delivery centers
 - Recent HRO-related developments
 - Technology offerings within MPHRO

- **Service provider briefings**
 - Vision and strategy
 - Key strengths and improvement areas
 - Annual performance and future outlook
 - Emerging areas of investment

- **Buyer reference interviews, ongoing buyer surveys, and interactions**
 - Drivers and challenges for adopting workplace services
 - Assessment of service provider performance
 - Emerging priorities
 - Lessons learnt and best practices

Service providers assessed¹

accenture

ADP

alight

Capgemini

CAPITA

CONDUENT

CGI

DXC.technology

Hexaware
TECHNOLOGIES

IBM

Infosys

MHR

NEEYAMO

NGA
Human
Resources

onesource
VIRTUAL

TATA CONSULTANCY SERVICES

Toutatis

wipro

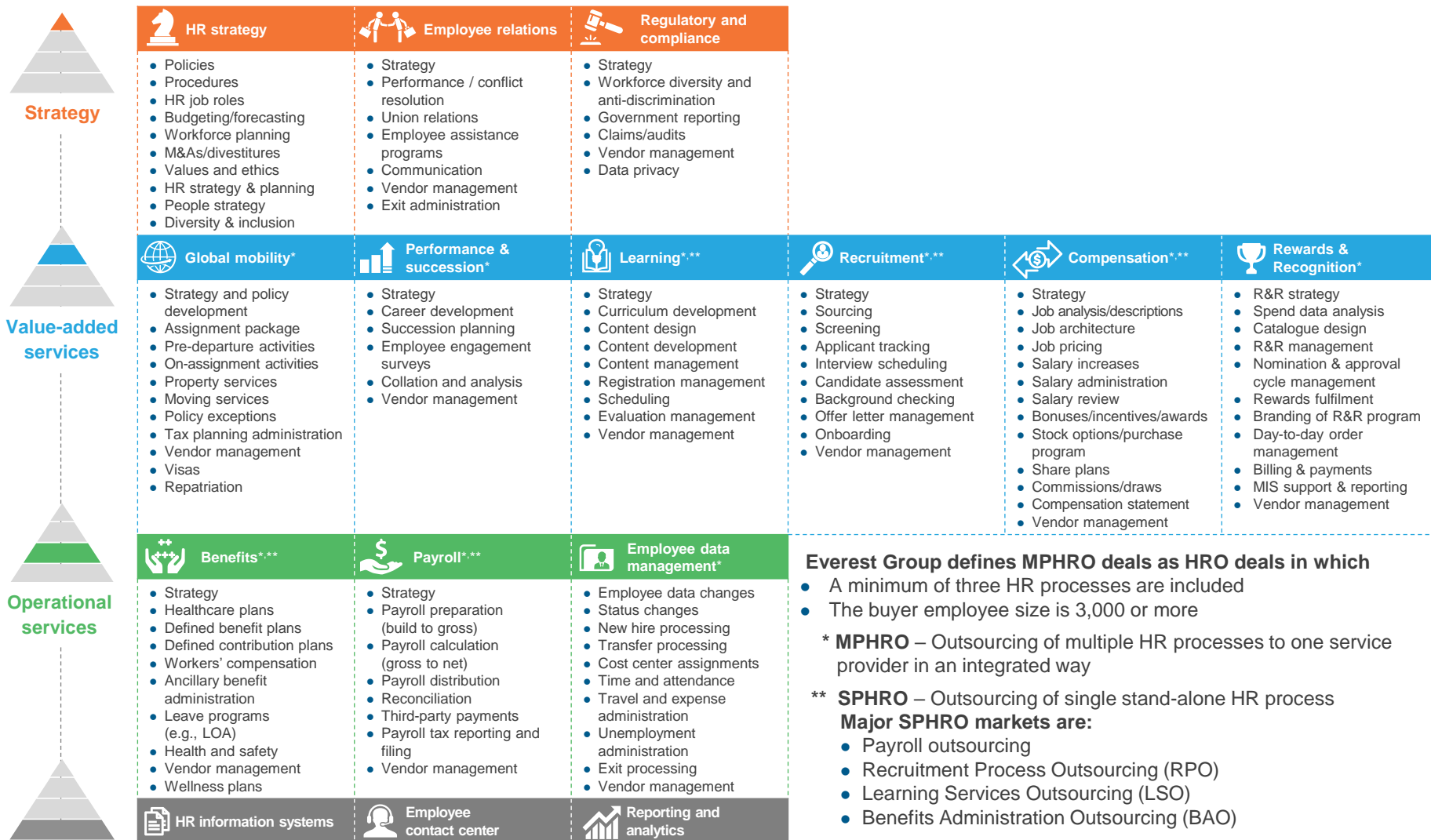
WNS
Extending Your Enterprise

ZALARIS

¹ Assessment for Capita, CGI, Hexaware, MHR, Toutatis, and Wipro excludes service provider inputs on this particular study, and is based on Everest Group's estimates which leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage, the service provider's public disclosures, and interaction with buyers
The source of all content is Everest Group, unless otherwise specified

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

Everest Group HRO process map



Overview and abbreviated summary of key messages

This report examines the dynamics of the Multi-Process Human Resources Outsourcing (MPHRO) service provider landscape. It provides a deep-dive analysis of how the service providers shape up in terms of their market success and vision & capability. Based on the comprehensive Everest Group PEAK Matrix, 20 MPHRO service 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:

MPHRO PEAK Matrix™ 2019

- Everest Group classifies 20 MPHRO service providers on the Everest Group PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants
- Based on the 2019 MPHRO PEAK Matrix, the segmentation of service providers is as follows (in alphabetical order within each category):
 - **Leaders:** Accenture, ADP, Alight Solutions, IBM, and NGA Human Resources (NGA)
 - **Major Contenders:** Capgemini, CGI, Conduent, DXC Technology, Hexaware, Infosys, Neeyamo, OneSource Virtual, TCS, Wipro, WNS, and Zalaris
 - **Aspirants:** Capita, MHR, and Toutatis
- Based on the relative Year-on-Year (YOY) movement of service providers on the PEAK Matrix, Everest Group identified three service providers as the “2019 MPHRO Market Star Performers” – ADP, TCS, and Zalaris

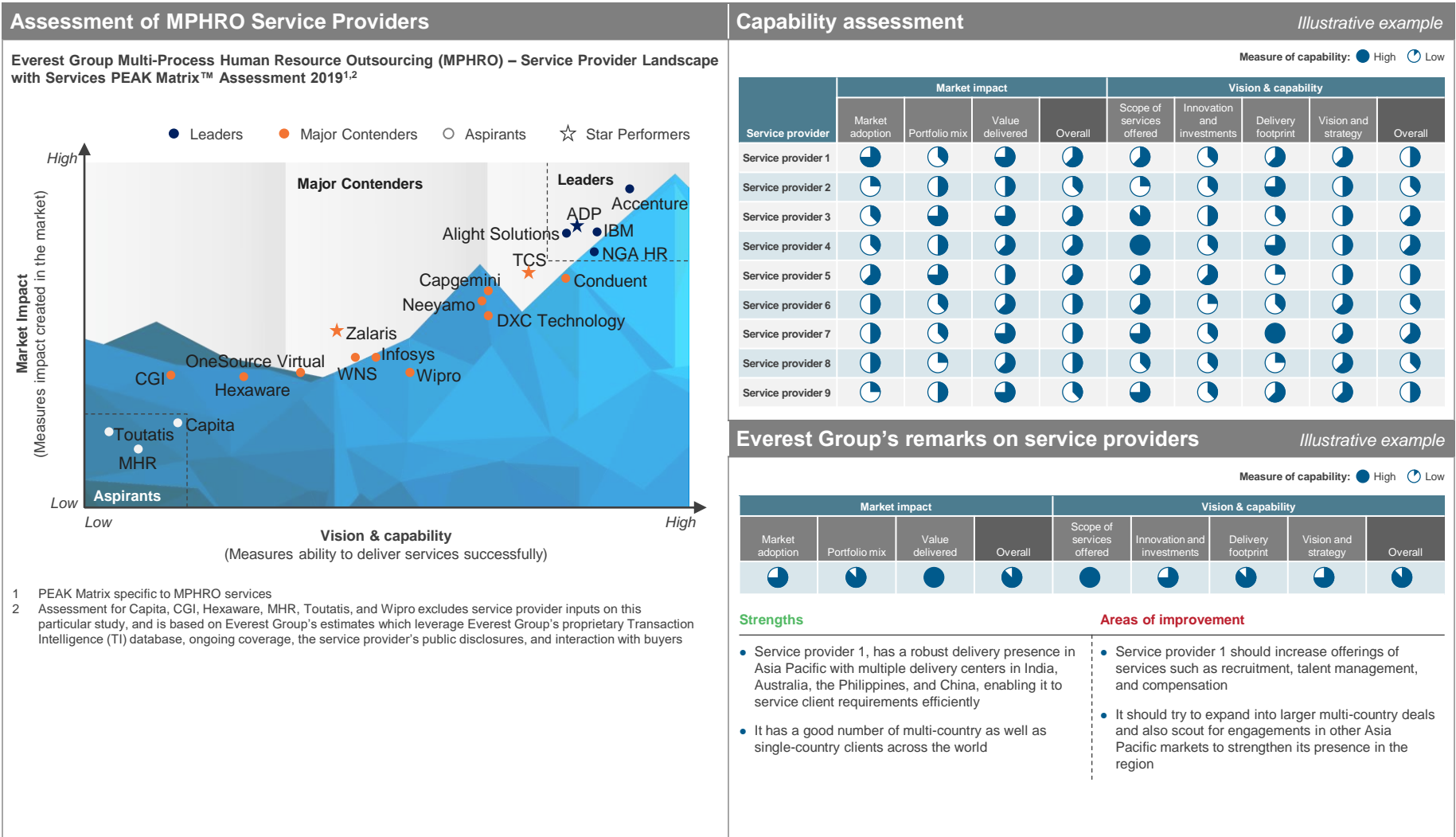
Comparison of service provider categories

- This section compares the various service provider categories at an aggregate level across various parameters
- The section highlights the key areas where the Leaders have been able to differentiate themselves from other service providers

MPHRO service provider commentary

- Everest Group delineates each of the 20 service provider's 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

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



Research calendar – Human Resources Outsourcing (HRO)

Published
 Planned
 Current release

Flagship HRO reports

Release date

Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2018	September 2018
Rewards and Recognition (R&R) Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2018	September 2018
Multi-Country Payroll Outsourcing (MCPO) – Annual Report 2019	October 2018
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2019	October 2018
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2019	January 2019
Multi-Country Payroll Platform- Provider Landscape with PEAK Matrix™ Assessment 2019	Q1 2019
Multi-Process Human Resources Outsourcing (MPHRO) – Annual Report 2019	Q1 2019
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2019	Q1 2019
Workday-based Human Resource Business Process Services (HR BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2019 ...	Q2 2019
Workday-based Human Resource Business Process Services (HR BPS) – Market Report 2019	Q2 2019

Thematic HRO reports

Re-imagining Payroll in a Digital-First World	July 2018
Key Ingredients for a Successful Digital-First HR Transformation	October 2018
The Mid-Market HCM Landscape in Asia Pacific	Q1 2019
Achieving Employee Experience – a “How-to Guide” for Enterprises (1 of 3)	Q1 2019
Learning function of the future	Q1 2019
Employee Engagement Suites – Evolution of next-generation HR products (2 of 3)	Q2 2019

Note: For a list of all of our published HRO reports, please refer to our [website page](#)

Additional HRO research references

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

1. **Key Ingredients for a Digital-First HR Transformation** ([EGR-2018-24-R-2830](#)); 2018. The HR function is facing a wave of transformation. There is a need to move away from the traditional ways of managing workforce to a flexible, fluid and integrated HR operating model. This report provides a comprehensive analysis of the key transformation levers for a successful digital-first HR transformation. It also highlights the advantages of the levers and their current adoption in HRO deals. The report mentions some HR specific use-cases for which the transformation levers can be effectively leveraged
2. **SuccessFactors-Based Human Resources Business Process Services (HR BPS) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018** ([EGR-2018-24-R-2675](#)); 2018. This research provides comprehensive coverage of the 2017 SuccessFactors-based HR BPS market and analyzes it across various dimensions such as market overview, buyer adoption trends, solution trends, and service provider landscape. Based on the comprehensive Everest Group PEAK Matrix, each of the 11 service providers are segmented into Leaders, Major Contenders, and Aspirants. This report also contains Everest Group's remarks on each of the 11 service providers' strengths and areas of improvement.
3. **Multi-Country Payroll Outsourcing (MCPO) Annual Report 2019 – Persistent Growth Amidst Evolving Propositions** ([EGR-2018-24-R-2820](#)); 2018. This research focuses on one of the fastest growing markets in the HR outsourcing space – Multi-Country Payroll Outsourcing (MCPO) market. The MCPO market grew rapidly at a rate of ~20% from 2016 to 2017. With growing awareness of the MCPO value proposition and increasing provider maturity, this momentum is likely to continue for the next couple of years. This report provides a comprehensive coverage of the 2018 MCPO market and analyzes it across various dimensions such as market overview, buyer adoption trends, solution & transaction trends, and service provider landscape.

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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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