



Services Procurement – Service Provider Landscape with PEAK Matrix™ Assessment 2019

Managed Service Provider (MSP)

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

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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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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, 15 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 2019

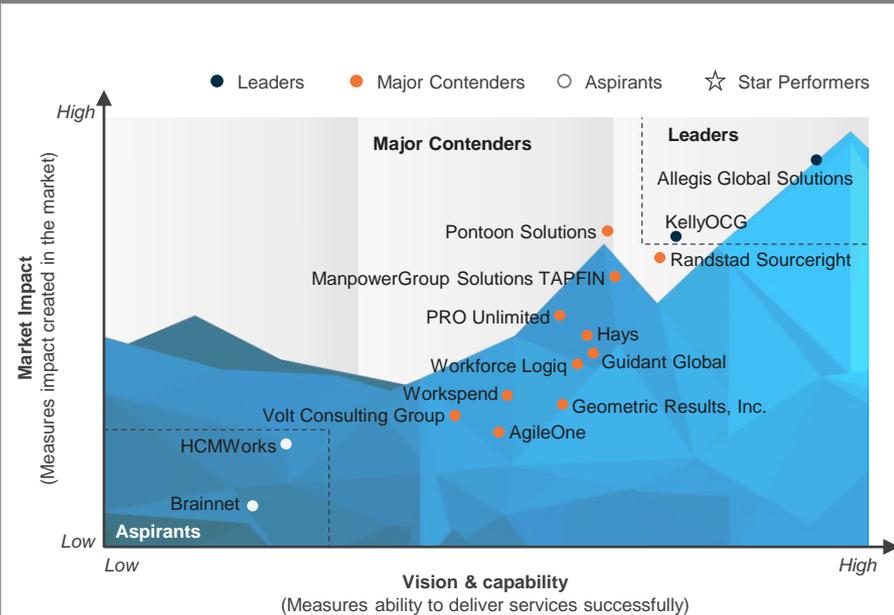
- Everest Group classifies services procurement service providers based on the Everest Group PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 14 established services procurement service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

Services procurement service provider commentary

- Everest Group delineates each of the 15 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

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 2019



Note 1: Assessment for Aspirants and AgileOne, Geometric Results, Inc., PRO Unlimited, and Workforce Logiq (among Major Contenders) is based on Everest Group estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage & public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete

Note 2: For a detailed service provider profile, please refer to the MSP – Service Provider Profile Compendium 2019 report

Capability assessment

Illustrative example

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

Illustrative example

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

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 2018	September 2018
Managed Service Provider (MSP) Service Provider Compendium 2019	December 2018
Managed Service Provider (MSP) Annual Report 2019 – Navigating through uncharted territories: Is the industry compass ready?	December 2018
Managed Service Provider (MSP) – Buyer Report	March 2019
Managed Service Provider (MSP) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019	June 2019
Managed Service Provider (MSP) Service Provider Compendium	August 2019
Services Procurement – Service Provider Landscape with PEAK Matrix™ Assessment 2019	October 2019
Managed Service Provider (MSP) Annual Report	Q4 2019

Thematic MSP reports

Reimagining Talent Acquisition in a Digital – First Era	March 2018
MSP: A peek into Buyers' mind – Digital and Futuristic Outlook is the Key to Buyers' Delight	August 2018
Digital startups in Talent Acquisition (Part 3 of 3)	October 2018
Managed Service Provider : A Peek Into the Buyers' Mind	March 2019
Clash of MSP and PO Markets	March 2019
Insights – Best in Class MSP Programs	Q4 2019

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

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 2019** ([EGR-2019-25-R-3207](#)); 2019. 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) Annual Report 2019 – Navigating Through Uncharted Territories: Is the Industry Compass-Ready?** ([EGR-2018-25-R-2894](#)); 2018. The global Managed Service Provider (MSP) market is growing steadily on the back of rising demand for contingent workforce across geographies and industries. It is expected to witness a growth rate of 10-12% in 2018, backed by ever-increasing demand for temporary workers, rise in adoption of services procurement, and the emergence of the gig economy, resulting in rapidly-increasing numbers of freelancers/ICs
- 3. Services Procurement – Service Provider Landscape with PEAK Matrix™ Assessment 2018** ([EGR-2018-25-R-2888](#)); 2018. In this research, we analyze the services procurement service provider landscape across the following dimensions: Services procurement PEAK Matrix for 2018 and Service provider delivery capability assessment
- 4. 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

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