



Service Provider Profiles – Preview Deck

Service Provider Intelligence

Everest Group's service provider profiles provide organizations with accurate, fact-based and comprehensive snapshots of individual service provider capabilities

Challenges involved in obtaining actionable service provider information

- Lack of reliable market data on service provider offerings and capabilities
- Rapidly evolving service provider capabilities
- Highly complex and time-consuming activity

Everest Group's multi-layered service provider profiles provide in-depth information and actionable insights on outsourcing and offshoring service providers. Our profiles are used by:

Buyers

- Understand and evaluate service provider capabilities to make critical service provider-related decisions
- Monitor developments driving opportunity and risk to existing service provider portfolio

Service Providers

- Track market activity and trends
- Understand capabilities and significant developments at key competitors

Types of available service provider profiles

1

Snapshot profiles: Profiles of overall service provider capabilities and information

2

Function-specific profiles: Profiles of a service provider's capabilities in a specific outsourcing function (e.g., IT, BPO, HRO)

Description of individual service provider profiles on subsequent pages

Snapshot profiles provide information and insights on a number of capability-related dimensions

1

Key dimensions covered

Company description

Key financials

Service offerings

Leadership

Locations

Client base

Business segments

Quality certifications

Credit rating

Transactions activity

Market developments

Partnerships and alliances

Snapshot profile

Corporate service provider profile
Company ABC

Company description: ABC is a global management consulting, technology services, and outsourcing organization. As a part of its outsourcing segment, Company offers both ITD and SPO services. It primarily serves industries like automotive, communications, electronics & high technology, and media & entertainment, among others.

Key leaders: William J. Green, Executive Chairman, Plains Partners; CEO: Jo DeGroot; COO: Pamela J. Craig; CFO: Walter G. Cole; Group Chief Executive - Technology: Michael J. Sakala; Group Chief Executive - SPO: [Name]

Headquarters: Dublin, Ireland

Service delivery capability: Global delivery centers across Europe, North America, Latin America, Africa, and Asia-Pacific

Major clients: AT&T, ST, Renault, Best Buy, Cable & Wireless, Electrolux, European Commission, Ghosla, Telecom Italia, Telefonica, Unilever, Whirlpool

Service offerings/capabilities: Analytics, application outsourcing, business process outsourcing, consulting, customer relationship management, finance and performance management, human resource management, infrastructure outsourcing, supply chain management

Market news:

- Mar 2012: ABC appointed Martin J. Cole as Chief Executive of the company's technology growth platform. Cole will also continue to serve as Chief Executive of ABC's Communications, Media & Technology operating group.
- Feb 2012: ABC opened its new R&D lab in Beijing, China. The new facility will enable ABC to monitor China's information technology (IT) needs and deliver solutions to meet the regional requirements.
- Jan 2012: ABC announced its partnership with RL group to launch a new multi-channel customer portal, which provides customers with an access to claim information via RL's website and through mobile devices.
- Jan 2012: ABC announced the release of 'ABC Connected Vehicle Integrated Solution'. The solution would help auto and truck manufacturers meet growing demand from consumers for vehicle technologies such as Wi-Fi access to the ability to process mobile payments for parking, insurance, and tolls.
- Jan 2012: ABC announced plans to hire ~60,000 employees in 2012, after closing with a global headcount of ~344,000 in 2011. The main objective ABC's aim to maintain its utilization rate at above 85% and growth in its backlog for the year 2012.
- Jan 2012: ABC announced the acquisition of First Africa Analytics, a Spain-based consulting firm specializing in optimization and predictive analytics, for an undisclosed amount.

1: FY ends August 31
2: As on February 2012
Source: Everest Group (EGR) public disclosures (last update: June 2012)

	FY 2011	FY 2010	FY 2009
Revenue ¹	1,042,627 M	1,042,103 M	1,042,177 M
Operating margins	13.8%	13.5%	12.2%
Employees	341,000 ²	354,000	331,000

Revenue services mix (2011): 15% Consulting, 41% outsourcing
Revenue regional mix (2011): 20% Products, 21% communications and high tech, 21% financial services, 18% resources, 15% health and public sector

Revenue geographical mix (2011): 44% Americas, 47% EMEA, 11% Asia-Pacific

Key reference locations: Argentina, Brazil, Chile, China, Czech Republic, Hong Kong, Hungary, India, Latvia, Malaysia, Mauritius, Mexico, Monaco, Philippines, Poland, Romania, Singapore, Slovakia, South Korea, Turkey

Quality certifications: CMMI 3, CMMI 5, ITIL, SAS 70, COC, ISO 9001, ISO 27001, ISO 18001

Credit rating: A- (S&P's)

Recent transactions:

- Mar 2012: Guinness Anchor Berhad (GAB), AD contract
- Mar 2012: USOP Department of Education and Communities - Australia, US\$ 95 M, 1 years, AD contract
- Mar 2012: Paragonix 1 years, AD contract
- Feb 2012: Norwegian National Police Directorate - Norway, AD contract
- Feb 2012: Rokkassjonehuset (Rokkassjonehuset), AD contract
- Feb 2012: Australian Department of Defense, 1 years, AD contract
- Feb 2012: Internal Revenue Service - United States, 10 years, AD contract
- Jan 2012: Directorate of Legal & Administrative Information - France, 3 years, AD contract
- Jan 2012: Federal Bureau of Investigation (FBI) - United States, 5 years, AD contract

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EGR-2012-5-SP-0001

Access our library of profiles at: <http://research.everestgrp.com/SupplierDirectory>

Function and location-specific service provider profiles are typically based on bottom-up, primary data and cover a large number of functions and countries

2

Key function-specific profiles available

BFSI BPO

Cloud Offering

Customer Relationship Management

Finance & Accounting Outsourcing (FAO)

Human Resources Outsourcing (HRO)

Information Technology (IT) Applications

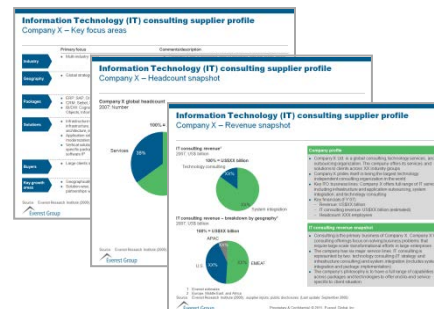
Order-to-cash

Procure-to-pay

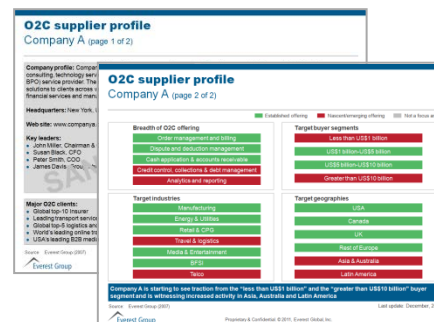
Procurement Outsourcing (PO)

IT-consulting profile

NOT EXHAUSTIVE



Order-to-Cash profile



Function and location-specific profiles typically vary from between one to three pages. Additional types of customized service provider profiles can be created on request

Note: Not all service provider profiles are available online

Service provider profiles for over 80 service providers are available

- 24/7 Customer
- Accenture
- Achievo
- Aditya Birla Minacs
- ADP
- ACS, a Xerox Company
- Ariba
- Arvato
- Atento
- Atos Origin
- Augmentum
- BearingPoint
- Bleum
- BT Global Services
- buyingTeam
- Capgemini
- Capita
- Ceridian
- CGI
- ClientLogic
- Cognizant
- CompuCom
- CSC
- Convergys
- Corbus
- Dell Services
- Dextrys
- Dimension Data
- ePLDT Ventus
- eTelecare
- ExcellerateHRO
- EXL Service
- Fidelity
- Firstsource
- Freeborders
- Fujitsu Services
- Genpact
- Getronics
- Global eProcure
- HCL Technologies
- Hewitt
- Hexaware
- HP Services
- Hubwoo
- IBM Global Services
- ICG Commerce
- I-flex
- iGate
- Infosys
- Keane
- L&T Infotech
- Logica
- Longtop International
- Mastek
- Mphasis
- NCO
- Neusoft
- NorthgateArinso
- OPI
- Patni
- Polaris
- Quattro
- SAIC
- Sapient
- Siemens
- Sitel
- Softtek
- Steria (formerly Xansa)
- Surestock
- Sutherland
- Sykes
- Syntel
- TCS
- Tech Mahindra
- Teleperformance
- TeleTech
- TELUS International
- Transcom
- T-Systems
- Unisys
- Vertex
- VWA
- West
- Wipro
- WNS
- Xchanging
- Zenta

NOT EXHAUSTIVE

- Most leading service providers have multiple types of service provider profiles
- The list of service providers is not exhaustive, and additional service provider profiles can be made available on request

Access our library of profiles at: <http://research.everestgrp.com/SupplierDirectory>

Note: Not all service provider profiles are available online

Everest Group's Service Provider Intelligence practice assists organizations with service provider-related decisions at all stages of the sourcing lifecycle

← Pre-outsourcing →

← Post-outsourcing →

Service Provider identification and profiles

Service Provider evaluation and short-listing

Service Provider risk tracking

Service Provider portfolio optimization

Service Provider landscape

This study focuses on eleven BPO service providers that meet our India centricity and scale criteria

Supplier	Comments on value proposition	Supplier	Comments on value proposition
Gen	Started as a captive for Cognizant but has been able to establish itself successfully as a third party supplier with a solid track record in the insurance sector.	SHR	Positioning themselves as a second generation outsourcing firm for clients who are looking for a cost-effective solution. Client specific IT, Localization and Communications technology services.
Indus	Formerly KCI's Onshore, it has grown organically as well as through acquisitions, increasing proportion of high end customer care and transaction processing in its services. Has a major win with the US insurance sector.	Indus	Rapidly growing through acquisitions. Focused on multiple segments. Has a major win with the US insurance sector.
GENPACT	Acquisition of Indian ITI's insurance division in 2012. Capable, fast and very successful BPO services in non-IT client areas.	Indus	Fully owned subsidiary of Aflac. Best Group, one of India's largest business houses. Stable financial health with no acquisition. Canada based firm.
FCCL	One of the early entrants through a large off-shore, which continues to be a large contributor. Increasing its focus on developing new services.	Indus	One of the first entrants with acquisition of Southshore. Currently well focused on operational efficiencies and high value work.
TSR	Formed by IBM's acquisition of Deltek in April 2004, has been able to scale up quickly. Proven offshore services support for large IBM clients, but also grows to market independently for primarily IBM and staff deals.	WNS	Started as a British Anvay company, WNS has developed over years into a fully owned, multi-nationality with a mix of vertical and manufacturing work.
Infysys	Started as an independent unit with a clear niche focus, but has evolved into a fully owned, multi-nationality with a mix of vertical and manufacturing work.		

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Evaluation framework

Service providers were evaluated across five main dimensions and qualitative commentary was also provided

Service Provider	Scale	AD&M	Insurance	Location	Quality	Overall	Comments
Service provider 1	High	High	High	High	High	High	Significant AD&M-related record. 4,500 employees focused on providing IT and BPO services to clients in the insurance sector. Experience in working with 12 of the top 10 largest insurance companies. Insurance Center of Excellence and capabilities foundation based office automation, policy administration and claims.
Service provider 2	High	High	High	High	High	High	In-depth insurance experience with 1,000 employees serving insurance clients. State of operation services for life and P&C. Clearly makes it a top supplier in the insurance vertical.
Service provider 3	High	High	High	High	High	High	10,000 employees serving insurance clients. Has significant experience in multiple insurance products, and operates end-to-end services in global markets.
Service provider 4	High	High	High	High	High	High	Limited outsourcing experience for AD&M. Ratings do not reflect recent reputation of OSC.
Service provider 5	High	High	High	High	High	High	The largest supplier across the group. SF # has the best reputation across all aspects of AD&M and insurance. The insurance group with over 9,000 employees, investment in technology and solid track record.
Service provider 6	High	High	High	High	High	High	

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Portfolio developments

Service provider risk dashboard

Key developments in the quarter that warranted increasing the level of governance:

- Infysys:** Concerns regarding Infysys' extremely high attrition rate which resulted in an off-invoice called Place (Infysys Risk and Career Enhancement) called out for audit. It is reported that Infysys has 4,000 employees working in the main outsourcing manager roles in the month of February alone.
- Wipro:** A 100% employee in Finance function announced approximately \$204 million from company's funds by getting access to a colleague's password. The fund, believed to be for three years, was discovered only in December 2009 raising concerns among clients over such an incident going unnoticed for a long period. Given that three of the six strategies for Wipro are now at "marginal" risk, we downgraded the overall Wipro enterprise to "marginal" risk.

Updated enterprise ratings at the end of the current period:

Account	Overall rating	Operational aspects	Financial aspects	Business practices	Human resources	Legal/ethics	Overall assessment
Accenture	High	High	High	High	High	High	High
IBM	High	High	High	High	High	High	High
Infysys	High	High	High	High	High	High	High
TCS	High	High	High	High	High	High	High
Wipro	High	High	High	High	High	High	High

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Value proposition analysis

Scenario evaluation

Scenario	Service provider (SP) portfolio	Assessment dimension	Back-up feasibility	Flexibility for future needs
1. Number of redundancies to be an offset as possible	Service provider #1, #2, #3, #4, #5, #6, #7, #8, #9, #10, #11	Number of redundancies	High	High
2. Desired back-up feasibility	Service provider #1, #2, #3, #4, #5, #6, #7, #8, #9, #10, #11	Back-up feasibility	High	High
3. Desired flexibility for future needs	Service provider #1, #2, #3, #4, #5, #6, #7, #8, #9, #10, #11	Flexibility for future needs	High	High

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Service Provider profiles

All 21 service providers were profiled in detail to exhibit their AD&M capability and their insurance expertise

Revenue	2009	2010	2011	Revenue from AD&M	2009	2010	2011
Revenue growth	15.0%	17.0%	18.0%	Revenue from Insurance	10.0%	12.0%	14.0%
Operating margin	10.0%	11.0%	12.0%	Revenue from Financial services	5.0%	6.0%	7.0%
EBITDA margin	15.0%	16.0%	17.0%	Revenue from Other services	3.0%	4.0%	5.0%
Operating leverage	1.2x	1.3x	1.4x	Revenue from Other services	2.0%	3.0%	4.0%

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Evaluation results

An initial filtering was done of the service provider universe to arrive at a long list of service providers with the ability to offer services that were of interest to the client

Supplier universe → 1st stage screening criteria → 1st down-select → 2nd stage screening criteria → 2nd down-select → Final selection criteria → Selected supplier

REPRESENTATIVE

Supplier 1, Supplier 2, Supplier 3, Supplier 4, Supplier 5, Supplier 6, Supplier 7, Supplier 8, Supplier 9, Supplier 10, Supplier 11, Supplier 12, Supplier 13, Supplier 14, Supplier 15, Supplier 16, Supplier 17, Supplier 18, Supplier 19, Supplier 20, Supplier 21

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Service Provider developments

Q1 2010 | Supplier risk dashboard

Wipro (page 2 of 3)

Key developments:

- Wipro's market reputation suffered a setback with a recent case of embezzlement by an employee. The employee was reported to have stolen \$100,000 from the company's funds. The incident was reported to the media and resulted in a significant loss of trust among clients.
- Wipro's employee responsible for the theft has been identified and is currently on leave. The company has implemented additional security measures to prevent such incidents from recurring.
- Wipro's overall risk rating remains "High" due to the nature of the incident and the potential for further losses.

Implications for client X:

- Client X should consider the risk of embezzlement when evaluating Wipro's services.
- Client X should consider the risk of reputational damage if the incident is widely publicized.
- Client X should consider the risk of financial loss if the employee's actions result in a significant loss of business.

Current assessment:

High

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Service Provider positioning

A summary assessment of the insurance vs. AD&M capability was also shown

Insurance capability vs. AD&M capability

Service Provider	Insurance capability	AD&M capability
Service provider 1	High	High
Service provider 2	High	High
Service provider 3	High	High
Service provider 4	High	High
Service provider 5	High	High
Service provider 6	High	High
Service provider 7	High	High
Service provider 8	High	High
Service provider 9	High	High
Service provider 10	High	High
Service provider 11	High	High

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Can be tailored for any function or location

Customised approach to meet individual needs

Ability to track a wide array of service providers

Applicable to simple as well as large, complex portfolios

In addition to service provider profiles, we helps companies with service provider evaluation and short-listing efforts

Objectives

- To assist buyers in identifying and short-listing service providers, and providing information and insights on service providers in established and new markets
- To assist service providers in identifying and prioritizing potential acquisition or partnership targets in emerging markets

Key issues involved in service provider short-listing

- Rapidly evolving service provider landscape
- Increasing number of credible service provider options (50+ credible service providers serving Fortune 500 clients in India alone)
- Perceived lack of differentiation between similar service provider groups
- Increasing risk on account of ongoing service provider consolidation
- Lack of reliable market data on service provider offerings and capabilities

Service provider selection requires a thorough evaluation of quantitative and qualitative parameters

Quantitative parameters

Scale

Financial stability

Process expertise

Industry expertise

Global delivery

Situation-specific criteria

Qualitative parameters

Everest Group experience

Cultural fit

Alignment of interests

Value proposition

Existing relationships

Situation-specific criteria

Our service provider short-listing experience spans a wide array of functions and geographies and can be tailored to meet individual client requirements

Service provider landscapes

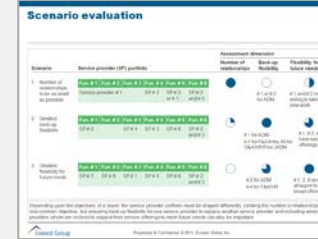
Service provider segments



Service provider landscape



Value proposition assessment



Can be tailored for any function or location

Service provider evaluation

Evaluation framework

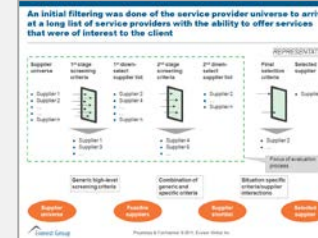
The evaluation ratings were based on the following set of criteria

Criteria	Weight	Score	Rating
Financial strength	15%	85.118	A
Operational excellence	25%	88.118	A
Customer satisfaction	20%	88.118	A
Employee satisfaction	15%	88.118	A
ESG (Environmental, Social, Governance)	25%	88.118	A

Multi-dimension evaluation



Screening process



Approach can be customized to meet individual needs

Service provider short-list/results

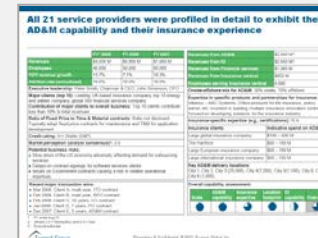
Service provider positioning



Service provider prioritization



Custom profile



Recommends best-fit Service providers depending on the situation

Contact us to better understand how we can best assist you

Everest Group uses its deep expertise and understanding of service providers to provide you with:

- Comprehensive capability profiles for leading service providers
- An extensive directory of service providers spanning multiple functions, industries and geographies
- Fact-based and practical assistance with short-listing of service providers
- Framework for optimizing and rationalizing service provider portfolios

Everest Group has been designed to meet the specific needs of your organization. Whether it be published or custom research, actionable tools, or even one-to-one interaction, we can develop a solution that applies to your particular scenario.

For more information about the Institute or to find out how we can assist you please contact us:

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Everest Group

Leading clients from **insight** to **action**

Everest Group is an advisor to business leaders on the next generation of global services with a worldwide reputation for helping Global 1000 firms dramatically improve their performance by optimizing their back- and middle-office business services. With a fact-based approach driving outcomes, Everest Group counsels organizations with complex challenges related to the use and delivery of global services in their pursuits to balance short-term needs with long-term goals. Through its practical consulting, original research, and industry resource services, Everest Group helps clients maximize value from delivery strategies, talent and sourcing models, technologies, and management approaches. Established in 1991, Everest Group serves users of global services, providers of services, country organizations, and private equity firms in six continents across all industry categories. For more information, please visit www.everestgrp.com and research.everestgrp.com.

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