



Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2017

Human Resources Outsourcing (HRO)
Market Report – August 2017: Preview Deck

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

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▶ Service Optimization Technologies

▶ 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

- This report is included in the following subscription(s)
 - **Human Resources Outsourcing (HRO)**
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* Banking, financial services, and insurance



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

1

- Everest Group's proprietary database of over **800 MCPO deals**
- The database tracks the following elements of each MCPO deal:
 - Buyer details: Including industry, location, and headquarter region
 - Deal details: Including TCV, ACV, term, start date, buyer employees served, payslips processed, and the primary pricing structure
 - Scope: 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 13 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, payslips processed, and buyer employees served
 - Geographic coverage by employees and split of clients by industry, number of countries, and employee-size coverage
 - MCPO service suite, delivery locations, and level of offshoring
 - Technology offerings within MCPO
 - Overall country coverage and partnerships

3

- Ongoing interaction with buyers, both as part of syndicated research relationships as well as custom research engagements

Service providers covered in detail in the analyses¹

ADITRO

ADP

Ascender

CELERGO
GLOBAL PAYROLL

cloudpay

elanor

EXCELITY

NEEYAMO
HR Consulting | Technology | Operations

NGA Human Resources

SafeGuard
World International
Your Payroll In Safe Hands

sdworx
Result driven HR

TMF
GROUP

ZALARIS

The analyses in this report are presented at two levels:

- 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 Assessment for **Aditro, Ascender, Celergo, Elanor, and SD Worx** 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

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

This report provides comprehensive and fact-based snapshots of major MCPO service providers. Below are four charts to illustrate the depth of each profile

Service capability and strategy

Company profile: XXX 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.yyx.com

Recent MCPO-related developments/announcements

- April 2017: XX
- February 2017: XX
- January 2017: XX

Current MCPO market segment focus

- Buyer segment: XX
- Geography: XX

Technology solution(s) offered

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

	Offshore1	Nearshore1	Onshore
XX		XX	XX

Total MCPO delivery FTEs = XX

Key partners

- XXX
- XXX

Functional capabilities within key MCPO areas across regions

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	✓	✓	✓	✓

Client portfolio

MCPO experience

- Total number of current MCPO clients: XX
- Annual number of payslips processed: XX

Major MCPO clients

XX XX XX XX XX

MCPO deal spread by number of countries in scope

100% = XX deals

Split of payslips 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

Country coverage by service provider on its own

Country coverage on its own

Everest Group assessment | Leader

Measure of capability ● Best-in-class ● Very high ● High ● Medium high ● Medium ● Medium low ● Low ● Not mature

Delivery capability					
Scale	Scope	Technology & innovation	Delivery footprint	Overall	Market success
●	●	●	●	●	●

Strengths

- Service provider 1 is a Leader in MCPO PEAK matrix due to a steady growth of revenue on the back of seven new deals
- Service provider 1, is investing in expanding its delivery footprint and has also looked into increasing its geographic coverage by expanding its offerings to several new countries

Areas of improvement

- Service provider 1 market success in the fast-growing Asia Pacific space, is relatively low for a large global player, accentuating the need to adapt to this fast growing market
- Buyers highlight the highly contract driven nature of engagements as preventing a more flexible and agile implementation

HRO research calendar

■ Published ■ Planned □ Current release

Flagship HRO reports

Release date

Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2016	Q4 2016
Technology in BPS – Service Provider Profile Compendium 2016	Q1 2017
Workday-Based HR BPS – Service Provider Landscape with PEAK Matrix™ Assessment 2017	Q2 2017
Workday-Based Human Resources Business Process Services (HR BPS) – Market Report 2017	Q2 2017
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2017	Q2 2017
Multi-Country Payroll Outsourcing (MCPO) – Annual Report 2017 – Evolution of Drivers and Enablers in a Rapidly-growing Market	Q2 2017
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2017	Q3 2017
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2017	Q3 2017

Thematic HRO reports

Global HR Outsourcing Trends Handbook 2016	November 2016
The Impact of Technology on HR GICs – A Call to Action	January 2017
Aon Goes Back to its Roots; the (Re-) Birth of an HR Outsourcing Specialist	March 2017
Payroll Outsourcing in Asia Pacific: Climbing Up the Maturity Ladder	March 2017
Long-Tail HR Operations: Key Challenges and How to Overcome Them	March 2017

Note: For a list of all Human Resources Outsourcing reports published by us, please refer to our [website page](#)

Additional HRO research recommendations

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 2017 – Evolution of Drivers and Enablers in a Rapidly-growing Market** ([EGR-2017-3-R-2244](#)); 2017. This research provides a comprehensive coverage of the 2016 MCPO market and analyzes it across various dimensions such as market overview, buyer adoption trends, solution trends, and service provider landscape. Key insights into the outsourcing models prevalent in the market and the service provider delivery footprint have also been provided
2. **Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2017** ([EGR-2017-3-R-2225](#)); 2017. This report assesses the MCPO capabilities of different service providers and evaluates their positioning on the Everest Group PEAK Matrix. It provides insights into how 13 MCPO service providers are beefing up their capabilities and are differentiating themselves in this market. These providers have been segmented into Leaders, Major Contenders, and Aspirants on the Everest Group PEAK Matrix. The report also includes remarks on service providers, highlighting their key strengths and development areas
3. **Workday-Based Human Resources Business Process Services (HR BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2017** ([EGR-2017-3-R-2209](#)); 2017. This report assesses the Workday-based HR BPS capabilities of different service providers and evaluates their positioning on the Everest Group PEAK Matrix. It provides insights into how 10 service providers are beefing up their capabilities and are differentiating themselves in the light of these shifts. These providers have been segmented into Leaders, Major Contenders, and Aspirants on the Everest Group PEAK Matrix. The report also includes remarks on service providers, highlighting their key strengths and development areas

For more information on this and other researches 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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