



Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2017

Managed Service Provider (MSP)
Market Report – September 2017: Complimentary Abstract / Table of Contents

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Subscription information

- The full report is included in the following subscription(s)
 - **Managed Service Provider (MSP)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**

* Banking, financial services, and insurance

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



Corporate Headquarters

Office: +1-214-451-3000

info@everestgrp.com



European Headquarters

Office: +44-207-129-1318

unitedkingdom@everestgrp.com



Delhi Office

Office: +91-124-284-1000

india@everestgrp.com

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

1

- Everest Group's proprietary database of over **600 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 17 MSP service providers** (updated annually)
- The database tracks the following capability elements for each service provider:
 - MSP clients, revenue, service suite, and employees
 - Recent MSP-related developments (investments and partnerships)
 - MSP clients split by geography, industry, scope, and buyer size
 - MSP spend split by geography, source of hires, and type of sourcing model
 - MSP delivery locations and level of offshoring
 - MSP supplier partners by geography

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

The analyses in this report are 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 analyses based on the deal detail availability

Service providers covered in detail in the analyses



CAPITA RESOURCING



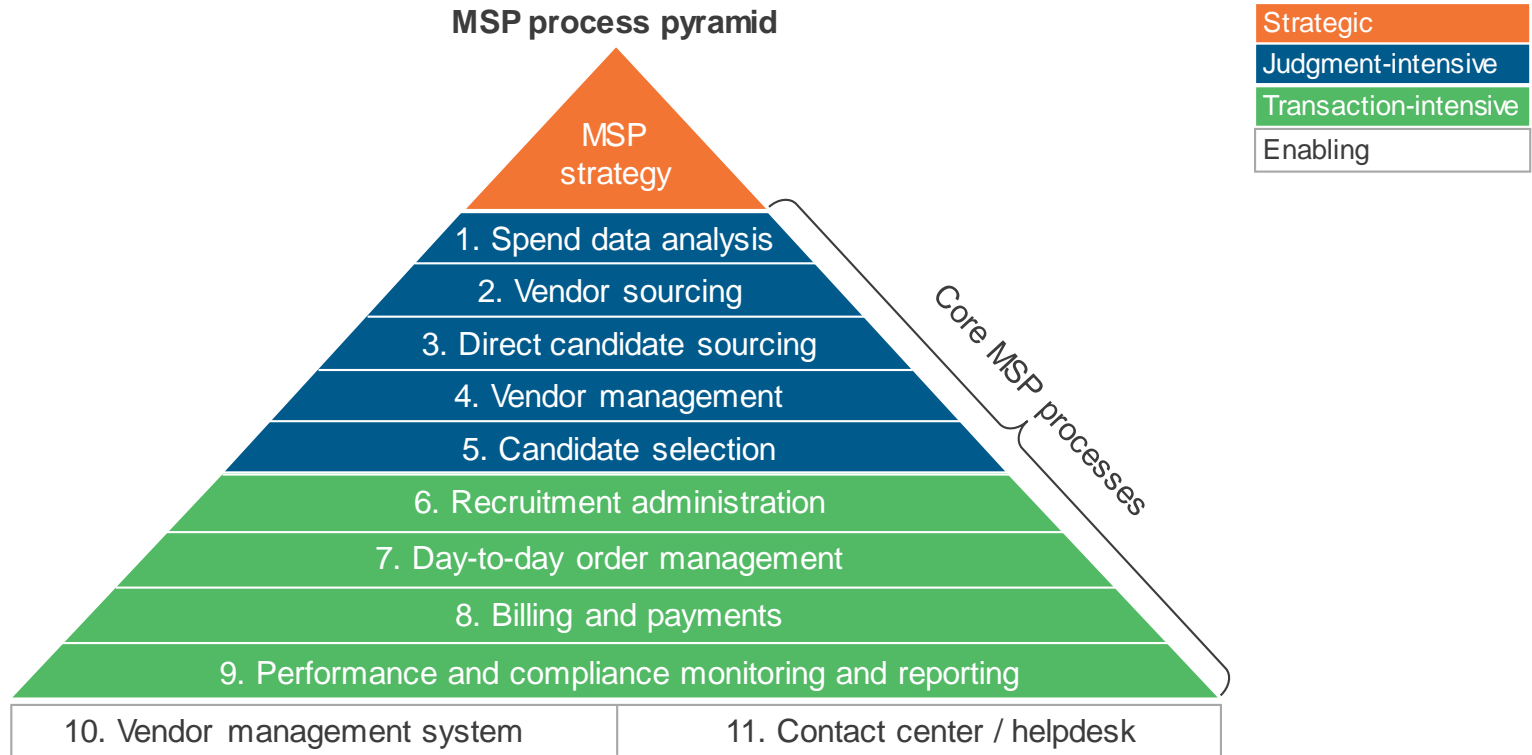
pontoon

PROUnlimited



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

Everest Group defines MSP as the transfer of ownership of all or part of the management of an organization's contingent/temporary staffing activities on an ongoing basis



Everest Group defines MSP deals as ones which satisfy the following key characteristics:

- A minimum of four core processes are included
- A minimum contract term of one year
- Scope of hires includes temporary/contingent hires, SOW consultants¹, and independent contractors

¹ Statement of Work (SOW) consultants are contracted for project-based work with pre-determined deliverables (as specified in the SoW) to be completed within a fixed amount of time. They are often paid on the basis of the final outcome/deliverable, but may be paid on an hourly basis as well

Source: Everest Group (2017)

Overview and abbreviated summary of key messages

This report examines the dynamics of the Managed Service Provider (MSP) market. It provides a deep-dive analysis of how the service providers shape up in terms of their market success and delivery capability. Based on the comprehensive Everest Group PEAK Matrix, 17 MSP 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 are:

MSP PEAK Matrix 2017

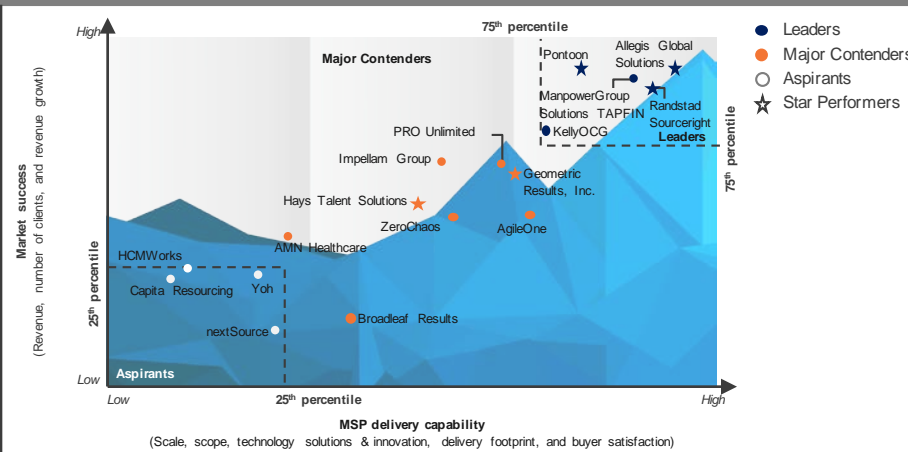
- Everest Group's PEAK Matrix categorizes MSP service providers into Leaders, Major Contenders, and Aspirants, based on their market success and overall MSP delivery capability
- Based on Everest Group's 2017 MSP PEAK Matrix, the 17 established MSP service providers evaluated are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** Allegis Global Solutions, KellyOCG, ManpowerGroup Solutions TAPFIN, Pontoon, and Randstad Sourceright
 - **Major Contenders:** AgileOne, AMN Healthcare, Broadleaf Results, Geometric Results, Hays Talent Solutions, Impellam Group, PRO Unlimited, and ZeroChaos
 - **Aspirants:** Capita Resourcing, HCMWorks, nextSource, and Yoh

MSP service provider commentary

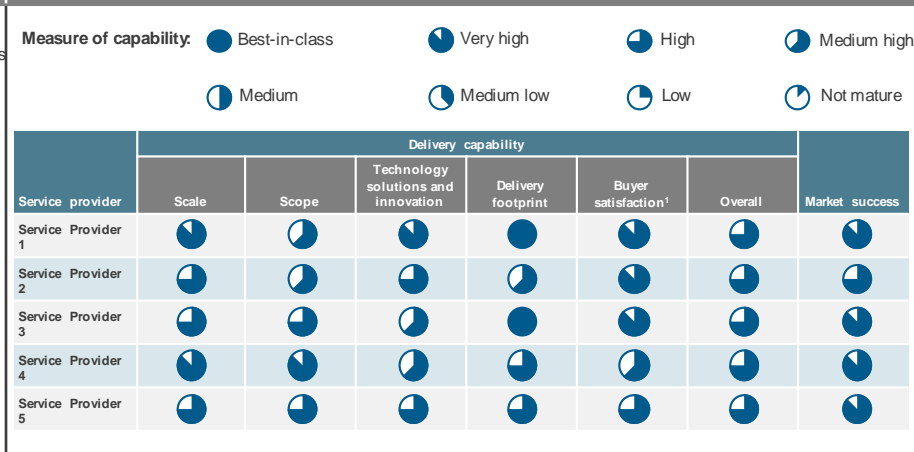
- Everest Group delineates each of the 17 service provider's strengths and areas of improvement
- The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

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

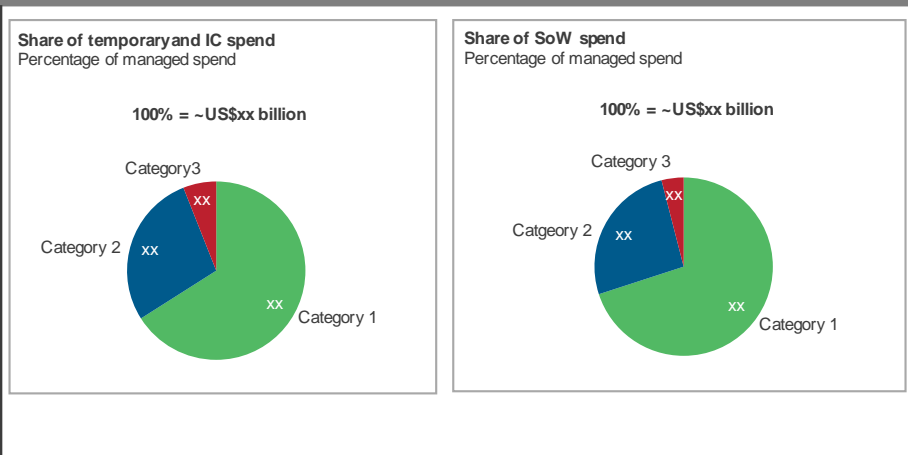
Everest Group PEAK Matrix™ for MSP



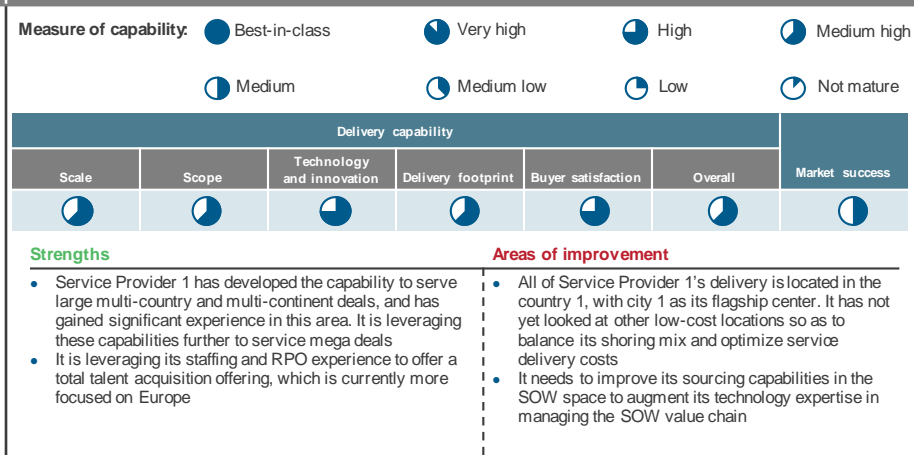
Service Providers' MSP market success & delivery capabilities



Key insight into MSP PEAK Matrix



Everest Group assessment of Service Provider 1



Source: Everest Group (2017)

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 2016 | December 2016 |
| Managed Service Provider (MSP) Service Provider Profile Compendium 2016 | December 2016 |
| Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2016 – Europe | January 2017 |
| Managed Service Provider (MSP) Annual Report 2016 – Embracing the New Talent Landscape | June 2017 |
| Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2017 | September 2017 |
| MSP Service Provider Landscape in Asia Pacific with PEAK Matrix | Q4 2017 |
| MSP Annual Report 2017 | Q4 2017 |

Thematic MSP reports

Release date

| | |
|--|---------------|
| Offshoring in MSP: A Scenario-Based Analysis of Potential Savings | October 2016 |
| Managed Service Provider (MSP): A Peek into the Buyer's Mind – Continuous Innovation is the Key to Buyer Delight | February 2017 |
| The Clash of MSP and PO | Q4 2017 |
| Freelancer Management | Q4 2017 |

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

Additional MSP related 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) Annual Report 2016 – Embracing the New Talent Landscape** ([EGR-2017-3-R-2212](#)); 2017. The global Managed Service Provider (MSP) market continued to remain one of the fastest growing single-process HRO markets. It posed a strong growth rate of 12% in 2016, backed by strong growth in the emerging markets of Asia Pacific and Latin America. The market is also undergoing a significant change as other service providers from the BPO and PO areas make inroads in what was earlier the exclusive domain of traditional MSP providers
2. **Talent Acquisition in Asia Pacific: Diverse Demands Ensuring Growth** ([EGR-2016-3-R-1764](#)); 2016. The concept of Recruitment Process Outsourcing (RPO) and Managed Service Provider (MSP) is picking up pace in Asia Pacific. Historically pioneered by West-headquartered organizations that had a presence in Asia Pacific, the RPO and MSP markets have reached a tipping point where many locally-headquartered buyers have started embracing these solutions
3. **MSP in Europe: A Homogenous Solution for a Heterogeneous Market?** ([EGR-2016-3-R-1698](#)); 2016. This report provides an overview of the MSP market in Europe, detailing the various heterogeneities in the market. Historically pioneered by U.S.-headquartered organizations that had a presence in Europe, the MSP market in Europe has reached a tipping point where many locally headquartered buyers have started embracing MSP solutions. This is further fueling the growth engine and resulting in double-digit growth in many European countries

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

Arkadev Basak, Practice Director:

arkadev.basak@everestgrp.com

Ankaj Mohindroo, Senior Analyst:

ankaj.mohindroo@everestgrp.com

Nisarga Vichare, Senior Analyst:

nisarga.vichare@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



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.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-804-276-4533

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

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