



Managed Service Provider (MSP) – Service Provider Profile Compendium 2017

Managed Service Provider (MSP)
Market Report – November 2017: 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

Subscription information

- This 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



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

- 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
- 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
- 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

Service providers covered in detail in the analyses



The analyses in this report are presented at two levels:

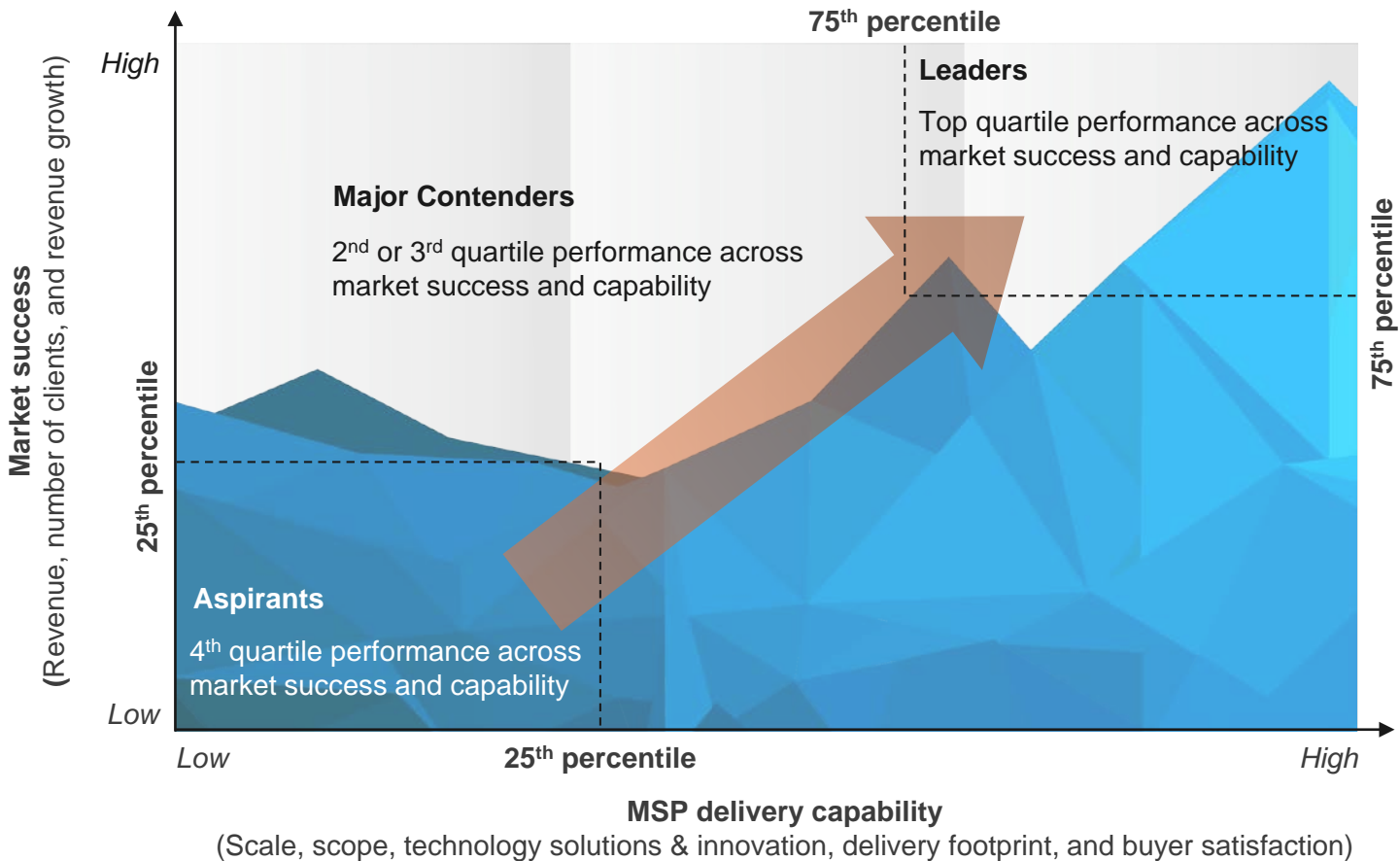
- Overall market analysis that highlights the market composition/dynamics
- The current market trends based on deal activities in the last five years

The sample size varies for different analyses based on the deal detail availability

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 PEAK Matrix™ is a proprietary framework for assessment of a service provider's capability

Everest Group PEAK Matrix for MSP



Everest Group's PEAK Matrix is a composite index of a range of distinct metrics related to a service provider's scale, scope, technology/domain investments, delivery footprint, and resultant market success in the context of a given services function.

This study provides a deep dive into key aspects of the MSP market; below are four charts to illustrate the depth of the report

Service capability and strategy

Company profile

XYZ is the outsourcing and consulting group of workforce solutions provider, XYZ, Inc. It is an MSP provider of solutions in the areas of recruitment process outsourcing, business process outsourcing, and contingent workforce outsourcing.
 Headquarters: State, the United States of America
 Leadership: Name, SVP & GM; Name, VP & MD
 Ownership: Public
 Parent company: XYZ
 Stock exchange/symbol: NASDAQ:XYZ
 Website: <http://www.xyz.com>

MSP experience

- Total managed spend: US\$XX billion
- Total number of current MSP clients: XX
- Total number of contingent workers managed: XX

Technology strategy

Proprietary Vendor Management System (VMS)
 Name: N/A
 Number of current deployments: N/A
 Technology partnerships
 VMS: XX
 Others: XX
 Number of technology-related FTEs: XX

Geography focus

As percentage of managed spend

MSP engagement model¹

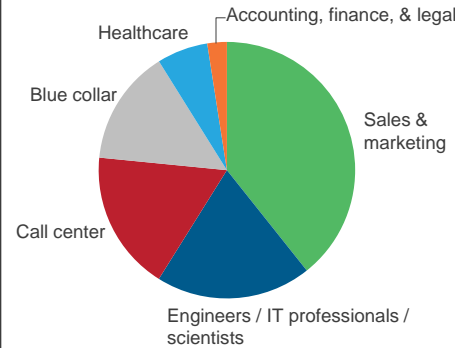
As percentage of managed spend

Global sourcing²

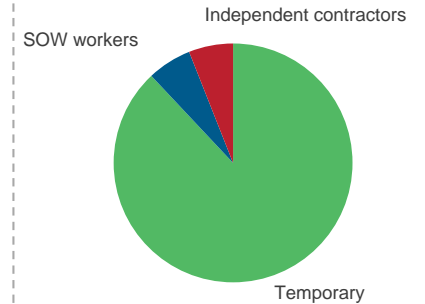
Total MSP delivery FTEs = XX

Portfolio

Managed spend split by job family



Managed spend split by type of worker



Key delivery locations



Everest Group's remarks on service providers

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

Delivery capability ¹					Market success
Scale	Scope	Technology and innovation	Delivery footprint	Overall	
●	●	●	●	●	●
Strengths			Areas of improvement		
<ul style="list-style-type: none"> XYZ is the outsourcing and consulting arm of XYZ, an American temporary staffing firm. It has strong capabilities in North America and provides a range of services including RPO, MSP, and executive search It has good presence across all major industries and provides MSP services across all major job families. It has the ability and experience to handle the diverse needs of all buyer sizes XYZ is leveraging automation to optimize its internal operations and is also advising clients on how to adapt their workforce strategy to leverage automation and reap benefits XYZ has developed an innovative engagement model, which is expected to provide it a significant competitive advantage 			<ul style="list-style-type: none"> XYZ has created a talent supply chain management approach to support the total workforce requirements. While it has seen some activity in the total talent acquisition space, it needs to better market these capabilities to taste significant success While XYZ has been praised by buyers for being proactive in bringing in new ideas and identifying areas of improvement in the contingent workforce program, it needs to be more responsive in managing escalations and handling time sensitive issues 		

¹ Based on contractual and operational information as of 2016
 Source: Everest Group (2017)

Source: Everest Group (year)

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
Managed Service Provider (MSP) – Service Provider Profile Compendium 2017	November 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 posted 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. **Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2017**([EGR-2017-3-R-2354](#)); 2017. In an age of rapid economic, demographic, and digital & technological evolution, the MSP market is undergoing transformative changes as well. Providers investing substantially and continuously in innovation over the next few months will be able to meet the upcoming challenges most effectively and surge ahead of competition

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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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