Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2018 – Asia Pacific

Managed Service Provider (MSP)
Market Report – December 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

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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
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* Banking, financial services, and insurance

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RESEARCH

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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 12 MSP Asia Pacific 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
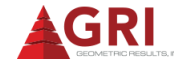 – MSP supplier partners by geography

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

Service providers covered in detail in the analyses

Agile1 · ALLEGIS GLOBAL SOLUTIONS · B · GRI GEOMETRIC RESULTS, INC. · HAYS Talent Solutions Intelligent Resourcing · IMPELLAM GROUP · pontoon · KELLYOCG OUTSOURCING & CONSULTING GROUP · PROUnlimited · randstad sourceright · TAPFIN ManpowerGroup Solutions · zerochaos

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

Overview and abbreviated summary of key messages

This report examines the dynamics of the Managed Service Provider (MSP) market in Asia pacific region. 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, 12 MSP Asia Pacific 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:

1

MSP PEAK Matrix 2017 – Asia Pacific

- 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 Asia Pacific PEAK Matrix, the 12 established MSP service providers evaluated are segmented into three categories (in alphabetical order within each category):
  - **Leaders:** Allegis Global Solutions and ManpowerGroup Solutions TAPFIN
  - **Major Contenders:** Hays Talent Solutions, Impellam Group, KellyOCG, Pontoon, PRO Unlimited, Randstad Sourceright, and ZeroChaos
  - **Aspirants:** AgileOne, Broadleaf Results, and Geometric Results
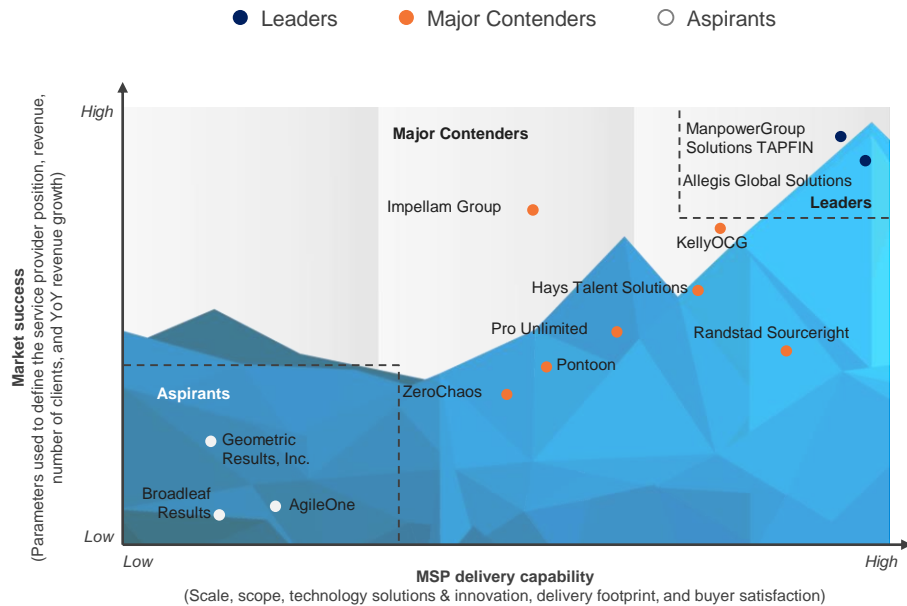
2

MSP service provider commentary

- Everest Group delineates each of the 12 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 contains two sections – Everest Group PEAK Matrix and remarks on each of the service providers; below are few exhibits that illustrate the depth of the report

Everest Group PEAK Matrix – 2017 MSP Asia Pacific market positions

● Leaders　● Major Contenders　○ Aspirants

Market success
(Parameters used to define the service provider position, revenue, number of clients, and YoY revenue growth)

High

Major Contenders

ManpowerGroup Solutions TAPFIN

Allegis Global Solutions

Leaders

Impellam Group

KellyOCG

Hays Talent Solutions

Pro Unlimited

Randstad Sourceright

Pontoon

ZeroChaos

Aspirants

Geometric Results, Inc.

Broadleaf Results

AgileOne

Low

Low　　　　　　　　　　　　　High

MSP delivery capability
(Scale, scope, technology solutions & innovation, delivery footprint, and buyer satisfaction)

Capability assessment

Service provider	Delivery capability					Market success
	Scale	Scope	Technology solutions and innovation	Delivery footprint	Overall	
Service Provider 1	◗	◕	◕	◔	●	◗
Service Provider 2	◗	◕	◗	◗	◕	◕
Service Provider 3	◕	◕	◕	◕	●	◕
Service Provider 4	◗	◕	◗	◔	●	◕
Service Provider 5	◗	●	◗	◕	◕	◗
Service Provider 6	◗	◔	◕	◔	◗	◔

Everest Group explains each service provider's strengths and areas of improvement

Delivery capability					Market success
Scale	Scope	Technology and innovation	Delivery footprint	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 region

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning in Asia Pacific
- 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

Source:　Everest Group (2017)

Research calendar – Managed Service Provider (MSP)

■ Published   ■ Planned   ⌐ ⌐ Current release

Flagship MSP reports	Release date
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	October 2017
Managed Service Provider (MSP) Annual Report 2018 – Towards the Next Frontier – Boldly Going Where Few Have Gone Before	December 2017
Managed Service Provider (MSP) - Service Provider Landscape with PEAK Matrix™ Assessment 2018 – Asia Pacific	**December 2017**
Services Procurement PEAK Matrix™ Assessment 2018	Q1 2018
Services Procurement Market Report 2018	Q2 2018

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
Freelancer Management	Q1 2018

Note: For a list of all MSP reports published by us, please refer to our website page

Additional MSP research references

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 2018 – Towards the Next Frontier – Boldly Going Where Few Have Gone Before** (EGR-2017-3-R-2471); 2017. The global Managed Service Provider (MSP) market continued to remain one of the fastest-growing single-process HRO markets. It is expected to pose a high growth rate of 9-11% in 2017, backed by ever-increasing demand for contingent workers, rise in adoption of Statement of Work (SOW), and the emergence of the gig economy, resulting in rapidly-increasing numbers of freelancers/ICs.

2. **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

3. **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

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

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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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