



Multi- Country Payroll Outsourcing (MCPO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018

Human Resource Outsourcing(HRO)

Market Report – September 2018: 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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Everest Group's MCPO research is based on multiple sources of proprietary information

- Everest Group's proprietary database of over **1,000 MCPO deals**
- The database tracks the following elements of each MCPO deal:
 - Buyer details: Industry and location including facilities and headquarters
 - Deal details: Including TCV, ACV, term, start date, buyer employees served, pay-slips 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

- Everest Group's proprietary database of **operational capability of over 15 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, pay-slips 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

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

The analyses in this report are presented at two levels:

- Overall 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

Service providers covered in detail in the analyses¹



Ascender



EXCELITY



¹ Assessment for **activpayroll, Elanor, PaySpace, 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 interactions 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

Overview and abbreviated summary of key messages

This report examines the global Multi-Country Payroll Outsourcing (MCPO) market and its service provider landscape. It provides a deep-dive analysis of how the service providers shape up in terms of their market impact and vision & capability. Based on the comprehensive Everest Group PEAK Matrix, 15 MCPO 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, among others, are:

Everest Group PEAK Matrix for MCPO services

- Everest Group classified 15 MCPO service providers on the Everest Group PEAK Matrix into three categories of Leaders, Major Contenders, and Aspirants
- The 2018 R&R Outsourcing services PEAK Matrix positioning is as follows:
 - **Leaders:** ADP, NGA Human Resources, and TMF Group
 - **Major Contenders:** activpayroll, Ascender, CloudPay, Excelity, iiPay, Neeyamo, SD Worx, Safeguard Global, and Zalaris
 - **Aspirants:** Blue Marble payroll, Elanor, and PaySpace

MCPO market overview

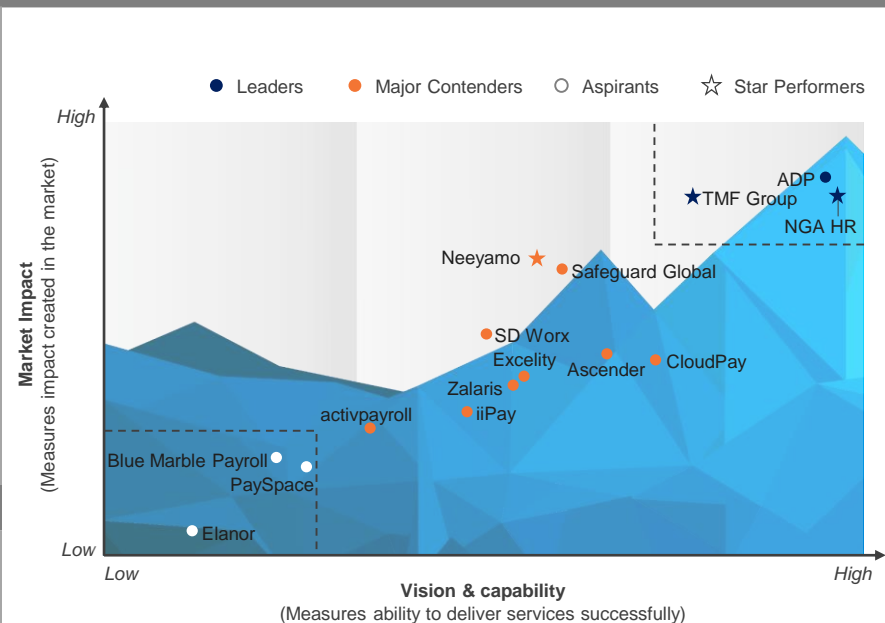
This section provides the MCPO service provider landscape in terms of revenue, active deals, along with geographically dominant service providers

MCPO service provider commentary

- Everest Group delineates each of the 15 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 four distinct chapters providing a deep dive into key aspects of MCPO market; below are the charts to illustrate the depth of the report

Everest Group PEAK Matrix™ for MCPO services



- Note 1: Service providers scored using Everest Group's proprietary scoring methodology given on page 12 in its main report
- Note 2: This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service provider public disclosures, and interaction with buyers. It has also taken inputs through RFIs from all providers except four (activpayroll, Elanor, SD Worx, PaySpace)
- Note 3: ADP's evaluation does not include the Celergo acquisition

Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1	●	○	●	●	●	○	●	●	○
Service provider 2	○	○	○	○	○	○	○	○	○
Service provider 3	○	●	○	○	○	○	○	○	○
Service provider 4	○	○	○	○	●	○	○	○	○
Service provider 5	●	●	○	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	○	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
●	●	●	●	●	○	○	○	○

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

Research calendar – Human Resources Outsourcing (HRO)

■ Published ■ Planned ▭ Current release

Flagship HRO reports

Release date

Multi-Process Human Resources Outsourcing (MPHRO) – Buyer Satisfaction Report 2018	March 2018
Heath and Welfare (H&W) Benefits Administration Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2018	March 2018
SuccessFactors-Based Human Resources Business Process Services (HR BPS) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018	June 2018
Heath and Welfare (H&W) Benefits Administration Outsourcing – Market Report 2018	June 2018
Heath and Welfare (H&W) Benefits Administration Outsourcing – Service Provider Profile Compendium 2018	June 2018
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2018	September 2018
Multi-Country Payroll Outsourcing (MCPO) – Annual Report 2018	Q3 2018
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2018	Q3 2018
Multi-Country Payroll Platform (MCPP) – Service Provider Landscape with PEAK Matrix™ Assessment 2018	September 2018

Thematic HRO reports

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
The Future of HR Services – An Employee-Centric, Digital-First Approach	September 2017

Note: For a list of all of our published HRO reports, 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. Heath and Welfare (H&W) Benefits Administration Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2018** ([EGR-2018-24-R-2678](#)); 2018. This report examines the dynamics of the global H&W BAO service provider landscape and its impact on the H&W BAO market. Based on the comprehensive Everest Group PEAK Matrix, each of the 11 H&W BAO service providers are segmented into Leaders, Major Contenders, and Aspirants. The report presents some key findings on the performance of different service provider categories. Additionally, it provides insights into the strengths and areas of improvements of each service provider.
- 2. SuccessFactors-Based Human Resources Business Process Services (HR BPS) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018** ([EGR-2018-24-R-2675](#)); 2018. This research provides comprehensive coverage of the 2017 SuccessFactors-based HR BPS market and analyzes it across various dimensions such as market overview, buyer adoption trends, solution trends, and service provider landscape. Based on the comprehensive Everest Group PEAK Matrix assessment, in this report 11 service providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report also contains Everest Group's remarks on each of the 11 service providers' strengths and areas of improvement.
- 3. Heath and Welfare (H&W) Benefits Administration Outsourcing Market Report 2018 - Unlocking Value Through Improved Employee Experience** ([EGR-2018-24-R-2719](#)); 2018. Health and Welfare Benefits Administration Outsourcing (H&W BAO) is one of the most compliance-driven markets in the HRO space. This research report provides a comprehensive coverage of the 2017 H&W BAO market and analyzes it across various dimensions such as market overview, buyer adoption trends, solution & transaction trends, and service provider landscape.

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

Anil Vijayan, Practice Director:

anil.vijayan@everestgrp.com

Amitesh Rawat, Senior Analyst:

amitesh.rawat@everestgrp.com

Priyanka Mitra, Senior Analyst:

priyanka.mitra@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
+91 806-781-9999

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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