



# **Multi-Country Payroll Platform (MCP) PEAK Matrix™ Assessment and Service Provider Landscape 2019**

Human Resources Outsourcing (HRO)

Market Report – January 2019: 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

## Membership information

- This report is included in the following research program(s)
  - **Human Resources Outsourcing (HRO)**
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at [info@everestgrp.com](mailto:info@everestgrp.com), [unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com), or [india@everestgrp.com](mailto:india@everestgrp.com)

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# Everest Group's MCPP research is based on the below sources of proprietary information

- Everest Group's proprietary knowledge base of **capability of over 11 MCPP providers**
- Regular platform demonstrations with providers as part of syndicated research relationships along with ongoing interaction with buyers, both as part of syndicated research relationships as well as custom research engagements helps form the knowledge base
- The knowledge base tracks the following capability elements for each provider:
  - Major clients and recent wins on the platforms
  - Overall 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
  - Overall country coverage and partnerships
  - Key features and functionalities of the platform
  - Key investments and future roadmap for the platform

## Service providers covered in detail in the analyses<sup>1</sup>



<sup>1</sup> Assessment for **Blue Marble Payroll and CloudPay** excludes service provider inputs on this particular study, and is based on Everest Group's estimates, which leverages its knowledge base, 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 Platform (MCPD) market and its provider landscape. It gives a deep-dive analysis of how the providers shape up in terms of their market impact and vision & capability. Based on the comprehensive Everest Group PEAK Matrix™, 11 MCPD providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group's remarks on each provider's strengths and areas of improvement.

Some of the findings in this report, among others, are:

## Everest Group PEAK Matrix for MCPD providers

- Everest Group classified 11 MCPD providers on the Everest Group PEAK Matrix into three categories of Leaders, Major Contenders, and Aspirants
- The 2019 MCPD PEAK Matrix positioning is as follows:
  - **Leaders:** ADP and NGA HR
  - **Major Contenders:** Ascender, CloudPay, Excelity, Neeyamo, Ramco, Safeguard Global, and Zalaris
  - **Aspirants:** Blue Marble payroll and iiPay

## MCPD geographic market overview

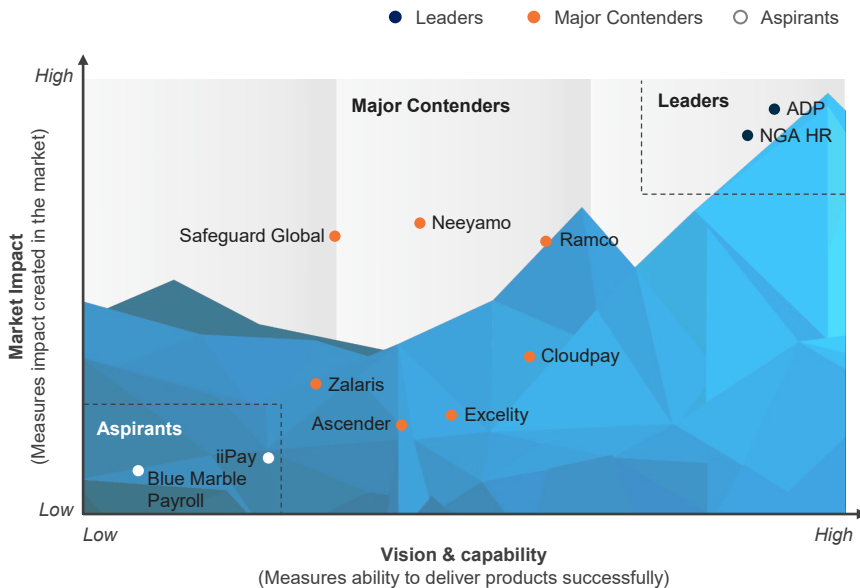
This section provides a geographic overview of the MCPD provider landscape in terms of revenue, self coverage, in-country partners and regional languages covered across different regions

## MCPD provider commentary

- Everest Group delineates each of the 11 provider's strengths and areas of improvement
- The in-depth commentary is intended to help providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

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

## Everest Group PEAK Matrix™ for MCPP providers



1 Assessment for Blue Marble Payroll and CloudPay excludes service provider inputs on this particular study, and is based on Everest Group's estimates that leverage its proprietary knowledge base, service providers' ongoing coverage & public disclosures, and interaction with buyers

## Capability assessment

## Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact			Vision & capability					
	Market adoption	Portfolio mix	Overall	Vision & strategy	Technology capability	Flexibility and ease of deployment	Engagement model	Support	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 providers

## Illustrative example

Measure of capability: ● High ○ Low

Market impact			Vision & capability					
Market adoption	Portfolio mix	Overall	Vision & strategy	Technology capability	Flexibility and ease of deployment	Engagement model	Support	Overall
●	●	●	●	●	○	○	○	○

### Strengths

- Service provider 1 is a Leader in MCPP 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-Country Payroll Outsourcing (MCPO) – Service Provider Landscape with PEAK Matrix™ Assessment 2018	September 2018
Rewards and Recognition (R&R) Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2018	September 2018
Multi-Country Payroll Outsourcing (MCPO) – Annual Report 2019	October 2018
Multi-Country Payroll Outsourcing (MCPO) – Service Provider Profile Compendium 2019	October 2018
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Landscape with PEAK Matrix™ Assessment 2019	January 2019
<b>Multi-Country Payroll Platform (MCP) PEAK Matrix™ Assessment and Service Provider Landscape 2019</b>	<b>January 2019</b>
Multi-Process Human Resources Outsourcing (MPHRO) – Annual Report 2019	Q1 2019
Multi-Process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2019	Q1 2019
Workday-based Human Resource Business Process Services (HR BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2019	Q2 2019
Workday-based Human Resource Business Process Services (HR BPS) – Market Report 2019	Q2 2019

## Thematic HRO reports

Re-imagining Payroll in a Digital-First World	July 2018
Key Ingredients for a Successful Digital-First HR Transformation	October 2018
The Mid-Market HCM Landscape in Asia Pacific	Q1 2019
Achieving Employee Experience – a “How-to Guide” for Enterprises (1 of 3)	Q1 2019
Learning function of the future	Q1 2019
Employee Engagement Suites – Evolution of next-generation HR products (2 of 3)	Q2 2019

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. Multi-Country Payroll Outsourcing (MCPO) Annual Report 2019 – Persistent Growth Amidst Evolving Propositions** ([EGR-2018-24-R-2820](#)); 2018. This research focuses on one of the fastest growing markets in the HR outsourcing space – Multi-Country Payroll Outsourcing (MCPO) market. The MCPO market grew rapidly at a rate of ~20% from 2016 to 2017. With growing awareness of the MCPO value proposition and increasing provider maturity, this momentum is likely to continue for the next couple of years. This report provides a comprehensive coverage of the 2018 MCPO market and analyzes it across various dimensions such as market overview, buyer adoption trends, solution & transaction trends, and service provider landscape.
- 2. 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.
- 3. 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.

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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](http://www.everestgrp.com).

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