Customer Experience Management (CXM) – Service Provider Landscape in EMEA with Services PEAK Matrix® Assessment 2020

September 2020: 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)
  – Customer Experience Management (CXM) Services
● 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**

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Background and scope of the research

The Customer Experience Management (CXM) market in Europe, Middle East, and Africa (EMEA) has experienced steady growth over the last few years, driven by increasing adoption of digital services and by emerging verticals and countries. While economic uncertainty created by COVID-19 has impacted the market, enterprises are trying to overcome the challenges presented by the pandemic and ensure superior customer experience. To this end, they are looking at areas such as digital CX and alternate delivery models such as Work At Home Agents (WAHA). Enterprises in the region expect service providers to help them fast-track digital adoption and transform their businesses. As a result, many service providers are experiencing a steep rise in the demand for digital services and are investing in digital capabilities such as analytics, automation, Artificial Intelligence (AI), and omnichannel solutions to support evolving client expectations. They are also offering value-added services beyond technology, in the form of CX consulting and design thinking-led customer journey orchestration. To effectively cater to these requirements, providers are developing capabilities through internal investments, their partnership ecosystem, and acquisitions.

In this research, we present detailed assessments of 21 CXM service providers in EMEA featured on the CXM Services PEAK Matrix® Assessment 2020. Each assessment provides a comprehensive picture of the service provider's market success, vision and strategy, service focus and capabilities, digital and technological solutions, domain investments, and buyer feedback. The assessment is based on Everest Group's annual RFI process for the calendar year 2020, interactions with leading CXM service providers, client reference checks, and an ongoing analysis of the CXM services market.

This report includes the following 21 leading CXM service providers in EMEA featured on the CXM PEAK Matrix® :

- **Leaders:** Capita, Comdata Group, Majorel, Sitel, Teleperformance, and Webhelp
- **Major Contenders:** Atento, Bosch Service Solutions, Concentrix, Conduent, Firstsource, Sutherland, Sykes, Tech Mahindra, TELUS International, Transcom, and Wipro
- **Aspirants:** Genpact, HCL, Infosys, and Startek

Scope of this report:

Geography
EMEA

Service providers
21

Services
CXM

Overview and abbreviated summary of key messages

This report examines the Customer Experience Management (CXM) market in EMEA and evaluates the positioning of service providers on the Everest Group PEAK Matrix. It provides insights on the market dynamics, service provider delivery capabilities, and Everest Group's remarks on service providers' key strengths and areas of improvement. It also identifies the key implications of the research findings for buyers and service providers.

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

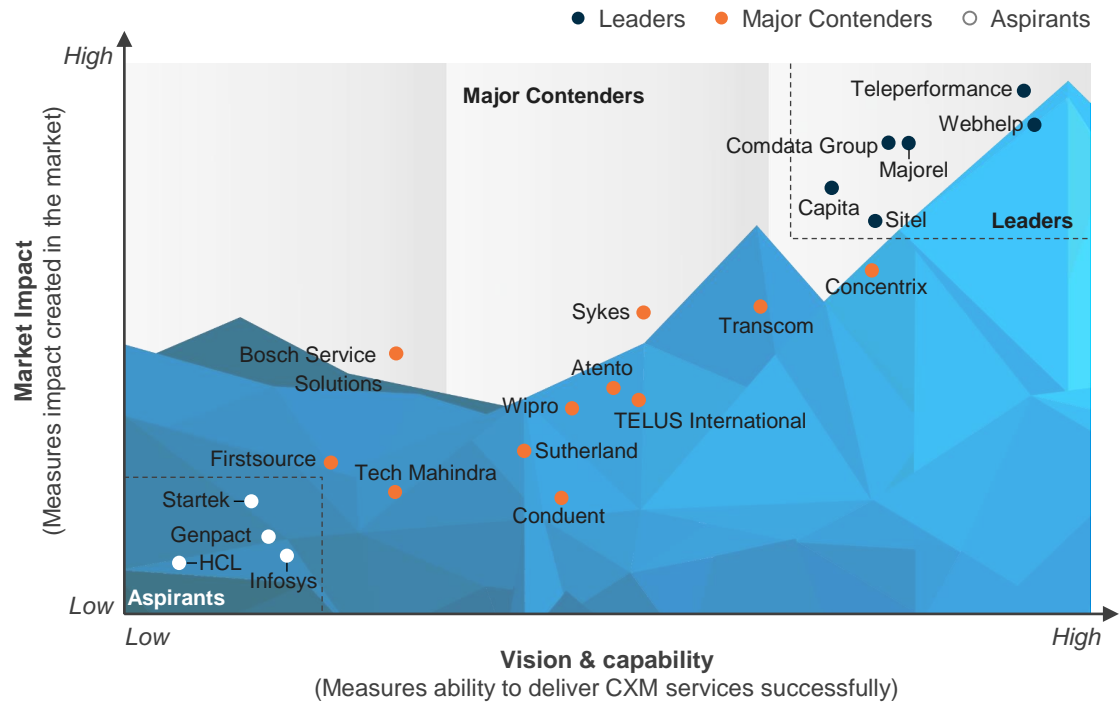**CXM service provider landscape in EMEA and PEAK Matrix 2020**

- Everest Group classifies 21 CXM service providers on the Everest Group PEAK Matrix into three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework to assess the relative market impact and the vision & capability of service providers
- Capita, Comdata Group, Majorel, Sitel, Teleperformance, and Webhelp have emerged as the Leaders
- Atento, Bosch Service Solutions, Concentrix, Conduent, Firstsource, Sutherland, Sykes, Tech Mahindra, TELUS International, Transcom, and Wipro are the Major Contenders
- Genpact, HCL, Infosys, and Startek have emerged as aspirants
- Comdata Group, Majorel, Teleperformance, and Webhelp have the largest client base in this region
- Teleperformance is the only player to rank among the top service providers across all countries
- Teleperformance and Webhelp are the top service providers across major industry verticals

Key insights on PEAK Matrix dimensions

- Multiple acquisitions have taken place in recent years in EMEA – such as Eishtec by Infosys, Competence Call Center (CCC) by TELUS International, and ISILIS by Majorel
- Leaders have been able to leverage their scale across high-, medium-, and low-cost locations to deliver a balanced delivery mix to clients, while other service providers continue to operate with significant presence in medium- and low-cost regions
- Leaders performed better than their peers across both newer and traditional KPIs
- They have also been able to develop more sophisticated digital solutions and have garnered greater success in implementation across their client base

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

CXM Services in EMEA PEAK Matrix® Assessment 2020

Illustrative example

● Leaders ● Major Contenders ○ Aspirants

Major Contenders

Teleperformance
Webhelp
Comdata Group
Majorel
Capita
Sitel
Leaders
Concentrix
Sykes
Transcom
Bosch Service Solutions
Atento
Wipro
TELUS International
Firstsource
Sutherland
Tech Mahindra
Startek
Conduent
Genpact
HCL
Infosys
Aspirants

High — Market Impact (Measures impact created in the market) — Low

Low — Vision & capability (Measures ability to deliver CXM services successfully) — High

Source: Everest Group (2020)

Capability assessment

Illustrative example

Measure of capability: ● High ◐ Low

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

Strengths
- Service provider 1 has developed a strong EMEA footprint with experience serving clients in geographies such as the United Kingdom, France, Germany, and Spain. It caters to clients across telecom, BFSI, retail, and energy & utilities
- Service provider 1 has made investments in areas such as omnichannel solutions, interaction analytics, customer acquisition platforms, and conversational assistants

Areas of improvement
- It has low adoption of outcome-based pricing constructs, which may inhibit its value proposition for buyers looking for risk sharing options, especially in deals involving a significant component of digital transformation
- Clients in the EMEA region emphasized the need to be proactive, employing skilled workforce, and boosting more collaboration in their engagement as focus areas for Service provider 1

Research calendar
Customer Experience Management (CXM)

■ Published   ■ Planned   ■ Current release

Flagship CXM reports	Release date
Intelligent Virtual Agents – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	March 2020
Intelligent Virtual Agents (IVA) – Technology Vendor Compendium 2020	May 2020
Conversing with AI – Intelligent Virtual Agents (IVA) State of the Market Report 2020	June 2020
Customer Experience Management (CXM) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	June 2020
Customer Experience Management (CXM) - Service Provider Compendium 2020	September 2020
Customer Experience Management (CXM) – Service Provider Landscape in EMEA with Services PEAK Matrix® Assessment 2020	**September 2020**
Customer Experience Management (CXM) - State of the Market Report	Q4 2020
Customer Experience Management (CXM) - Market Report on Europe, Middle East, and Africa (EMEA)	Q4 2020
WAHA Customer Experience Management (CXM) – Service Provider Landscape with PEAK Matrix® Assessment 2020	Q4 2020

Thematic CXM reports	Release date
Achieving High Value through a Total Cost of Operations (TCO) Pricing Model	November 2019
Orchestrating Successful WAHA-based Delivery	January 2020
Impact of Recession on the Business Process Services (BPS) Industry	January 2020
WAHA Adoption Trends – Impact of COVID-19	August 2020
Real-time Listening, AI, and Automation in CXM	Q4 2020
Contact Center as a Service (CCaaS) Market Report	Q4 2020

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

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