

# Customer Experience Management (CXM) State of the Market Report on Europe, Middle East, and Africa (EMEA) 2021

December 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

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## Background of the research

### Background of the research

The Customer Experience Management (CXM) outsourcing market in Europe, Middle East, and Africa (EMEA) has steadily grown over the last few years, driven by increased adoption of digital services across verticals and regions. However, significant disruptions in service delivery are occurring due to mandated lockdowns across regions. As enterprises try to ensure continuity in offering superior CXM services to customers, as well as overcome the decline in demand induced by the pandemic, they are now looking at areas such as digital CXM and alternate delivery models such as Work At Home Agents (WAHA). Enterprises in this region expect service providers to help them fast-track digital adoption and transform their business. As a result, many service providers are responding to a steep rise in demand for digital services. Accordingly, they 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 CXM 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 provide a comprehensive picture of the CXM outsourcing market in EMEA across various dimensions. Analysis is based on Everest Group's annual RFI process, interactions with leading CXM service providers, client reference checks, and our ongoing coverage of the EMEA CXM services market.

### Scope of this report:



**Geography**  
Europe, Middle East,  
and Africa



**Industry**  
All



**Services**  
Customer Experience  
Management (CXM)  
services

## Overview and abbreviated summary of key messages

The Customer Experience Management (CXM) outsourcing market in Europe, Middle East, and Africa (EMEA) has steadily grown over the last few years. However, COVID-19-induced restrictions are expected to contract the market. In this research, we present a comprehensive picture of the CXM outsourcing market in EMEA across various dimensions. Our analysis is based on Everest Group's annual RFI process, interactions with leading CXM service providers, client reference checks, and our ongoing coverage of the EMEA CXM services market.

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

### Accelerated growth of digital CXM

Digital solutions in the EMEA CXM industry are expected to grow strongly over the next few years. This growth will be driven by higher buyer demand for CXM consulting, technology solutions, and other value-added services to control costs and enhance customer experience. Enterprises also expect service providers to go beyond delivering cost savings and help them achieve significant business outcomes. This will often require innovation and transformation in service delivery, driving increased adoption of outcome-based pricing models

### Large-scale adoption of WAHA

Risks from the pandemic have resulted in WAHA being considered as an integral part of ongoing Business Continuity Planning (BCP) strategy and a meaningful component of business-as-usual operations. As enterprises build on confidence gained through working from home during forced lockdown periods, we expect accelerated growth in the WAHA model at the expense of the brick-and-mortar model over the next few years

### Rise of smaller markets

The demand for CXM outsourcing services in smaller markets in Central Europe, the Middle East, and Africa is expected to increase steadily in the next few years. This will be fueled by an emergence of industrial hubs and expansion of global enterprises in these locations

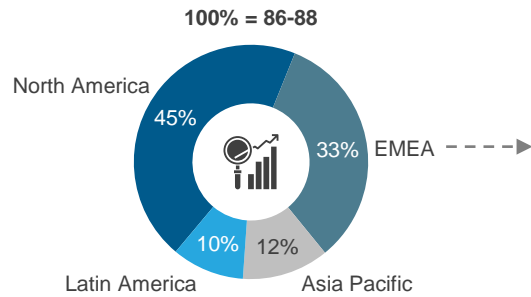
### Increase in CXM outsourcing

Considering uncertainties in the market caused by COVID-19, enterprises in EMEA are expected to increasingly outsource their in-house centers to leverage the expertise and flexibility of service providers and concentrate on their core business. With business agility and operational resilience considered as critical business continuity levers post pandemic, enterprises are increasingly looking to reduce risk and costs through greater levels of outsourcing

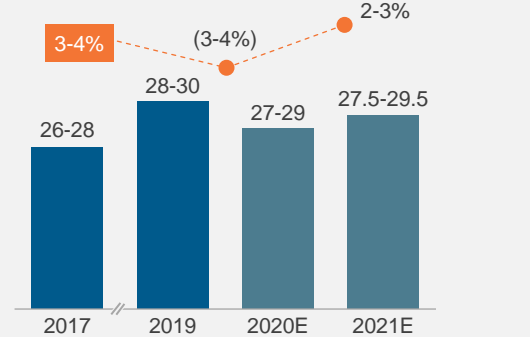
# This study offers three distinct chapters providing a deep dive into key aspects of the EMEA CXM outsourcing market; below are four charts to illustrate the depth of the report

## EMEA CXM outsourcing | market size and growth

**CXM outsourcing overall market size in 2019**  
US\$ billion

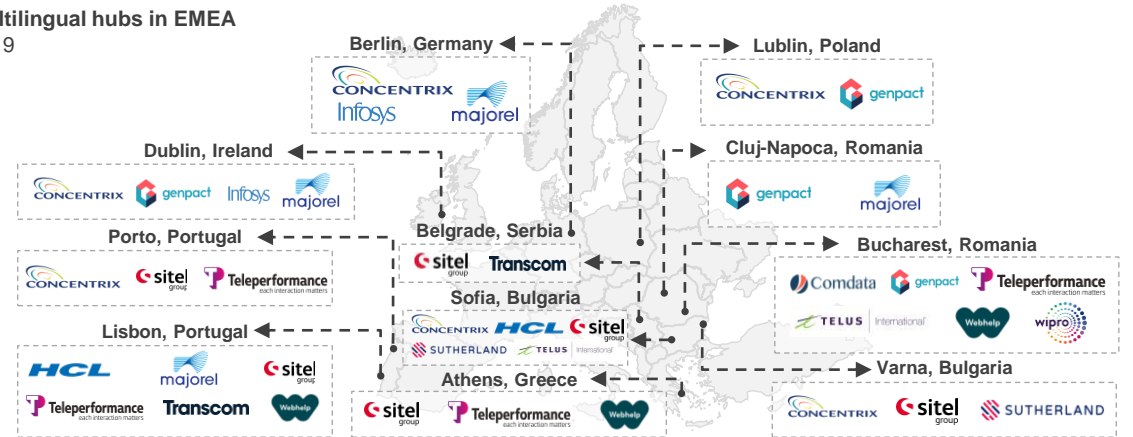


**CXM outsourcing market size of EMEA**  
2017-2021E; US\$ billion



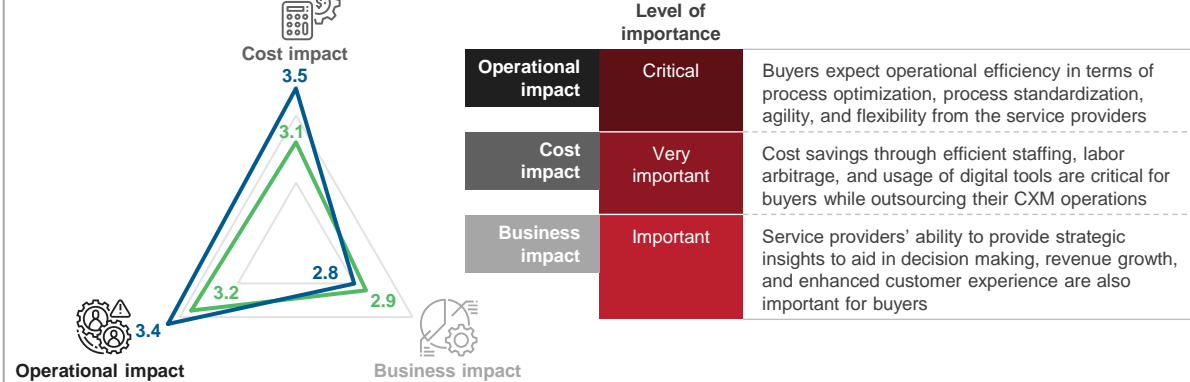
## EMEA CXM outsourcing | multilingual hubs

**Multilingual hubs in EMEA**  
2019



## EMEA CXM outsourcing | buyer importance and service provider performance

**Key CXM objectives and vendor performance**  
On a scale of 1 to 4



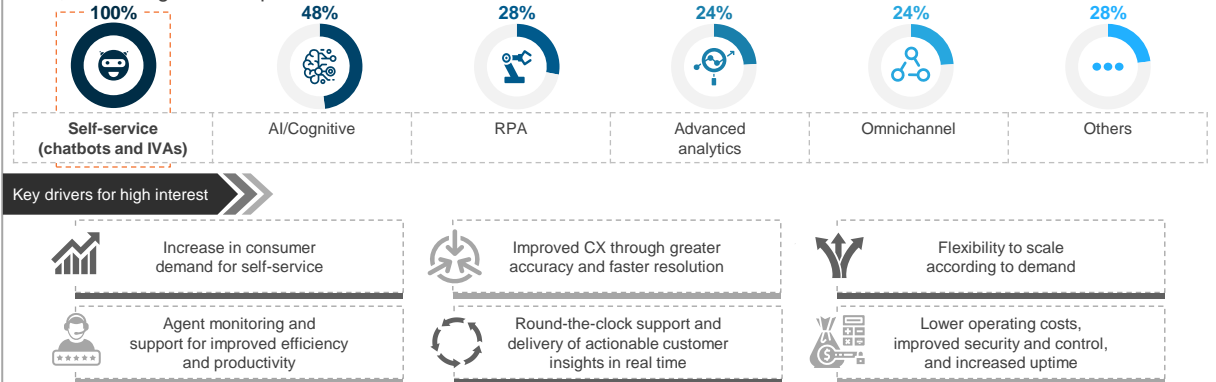
**Operational impact** **Critical**  
Buyers expect operational efficiency in terms of process optimization, process standardization, agility, and flexibility from the service providers

**Cost impact** **Very important**  
Cost savings through efficient staffing, labor arbitrage, and usage of digital tools are critical for buyers while outsourcing their CXM operations

**Business impact** **Important**  
Service providers' ability to provide strategic insights to aid in decision making, revenue growth, and enhanced customer experience are also important for buyers

## EMEA CXM outsourcing | digital CXM

**EMEA enterprises' top priorities from next-generation technology perspective**  
2020; Percentage of enterprises



# 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) State of the Market Report 2020: Conversing with AI	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
Navigating Uncertainties and Building Operational Resiliency: Customer Experience Management (CXM) State of the Market Report 2021	October 2020
Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2021	November 2020
<b>Customer Experience Management (CXM) State of the Market Report on Europe, Middle East, and Africa (EMEA) 2021</b>	<b>December 2020</b>
WAHA Customer Experience Management (CXM) Service Provider Landscape with PEAK Matrix® Assessment 2021	Q1 2021

### 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
Is Your Work-From-Agent Strategy Built to Last?	Q1 2021
Real-time Listening, AI, and Automation in CXM	Q1 2021

Note: For a list of all of our published CXM reports, please refer to our [website page](#)





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