

Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix[®] Assessment 2021

January 2021: 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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Source of information

This report is based on multiple key sources of proprietary information

- Proprietary database of 1,400+ MPHRO contracts of 20+ HR service providers with MPHRO services in scope of work (updated annually)
- The database tracks the following elements of each contract:
 - Buyer details including size and signing region
 - Contract details including service provider, contract type, TCV & ACV, service provider FTEs, start & end dates, duration, and delivery locations
 - Scope details including share of individual buyer locations being served in each contract, Line of Business (LOB) served, and pricing model employed
- Proprietary operational database of 20+ HRO service providers (updated annually)
- The database tracks the following for each service provider:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by delivery centers
 - Revenue split by region
 - Location and size of delivery centers
 - Technology solutions developed
- **Service provider briefings**
 - Vision and strategy
 - Annual performance and future outlook
 - Key strengths and improvement areas
 - Emerging areas of investment
- **Client reference interviews, ongoing client surveys, and interactions**
 - Drivers and challenges for adopting workplace services
 - Assessment of service provider performance
 - Emerging priorities
 - Lessons learnt and best practices

Service providers assessed¹

accenture

ADP

alight

ASCENT HR
powering people practice

Capgemini

Capita

CGI

CONDUENT

DXC.technology

IBM

Infosys

MHR

VEEYAMC

onesource
VIRTUAL

sdworx

sopra hr
SOFTWARE

TATA CONSULTANCY SERVICES

wipro

WNS
Extending Your Enterprise

ZALARIS

¹ Assessments for Capita, CGI, IBM, MHR, and Zalaris exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with MPHRO buyers

The source of all content is Everest Group unless otherwise specified

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion

Background and scope of the research

Background of the research

The global multi-process HRO market continued to grow at a steady rate of 5-7% in 2019. However, the market is currently witnessing short-term disruption due to COVID-19. While on one hand, the pandemic has negatively impacted contract renewals, new large-scale initiatives, and transaction volumes, on the other, increasing demand for immediate cost takeout / cash unlock, digitization, etc., is accelerating new digital initiatives and driving growth in MPHRO.

In 2019, large-scale transformation deals, increasing number of first-time outsourcers (especially in the SMB and mid-market segment), and increasing demand for next-generation technology and high-end HR work from mature outsourcers continued to drive market growth. The demand for HR services remained strong in the traditional markets of North America and Europe, while the emerging Asia Pacific (APAC) and Latin American (LATAM) geographies exhibited strong growth. Some of the key means that providers are using to differentiate themselves are offering end-to-end transformative solutions, combined with domain and industry expertise, design thinking approach, transformation frameworks, and next-generation innovative offerings leveraging automation and analytics. The purpose of this research is to understand and assess HRO service providers based on their vision & capabilities and impact on the MPHRO market and position them on Everest Group PEAK Matrix®.

In this research, we analyze the global MPHRO service provider landscape and its impact on the MPHRO market. In particular, we focus on:

- MPHRO PEAK Matrix® 2020 including service provider capability assessment and Star Performer analysis
- Service provider landscape
- Remarks on key strengths and limitations for each MPHRO service provider

Scope of this report:



Geography
Global



Service providers

This research covers the following 20 HRO service providers with multi-process capability: Accenture, ADP, Alight, Ascent HR, Capgemini, Capita, CGI, Conduent, DXC Technology, IBM, Infosys, MHR, Neeyamo, OneSource Virtual, SD Worx, Sopra HR, TCS, Wipro, WNS, and Zalaris



Services

Multi-process Human Resources Outsourcing (MPHRO) Services

Overview and abbreviated summary of key messages

This report examines the global MPHRO 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, 20 MCPS 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 limitations.

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

Service provider position and growth

- Everest Group classified 20 MPHRO providers on the Everest Group PEAK Matrix into three categories of Leaders, Major Contenders, and Aspirants
- The 2020 MPHRO PEAK Matrix positioning is as follows:
 - **Leaders:** Accenture, ADP, Alight Solutions, and TCS
 - **Major Contenders:** Capgemini, CGI, Conduent, DXC Technology, IBM, Infosys, Neeyamo, OneSource Virtual, SD Worx, Sopra HR, WNS, Wipro, and Zalaris
 - **Aspirants:** Ascent HR, Capita, and MHR

Provider landscape

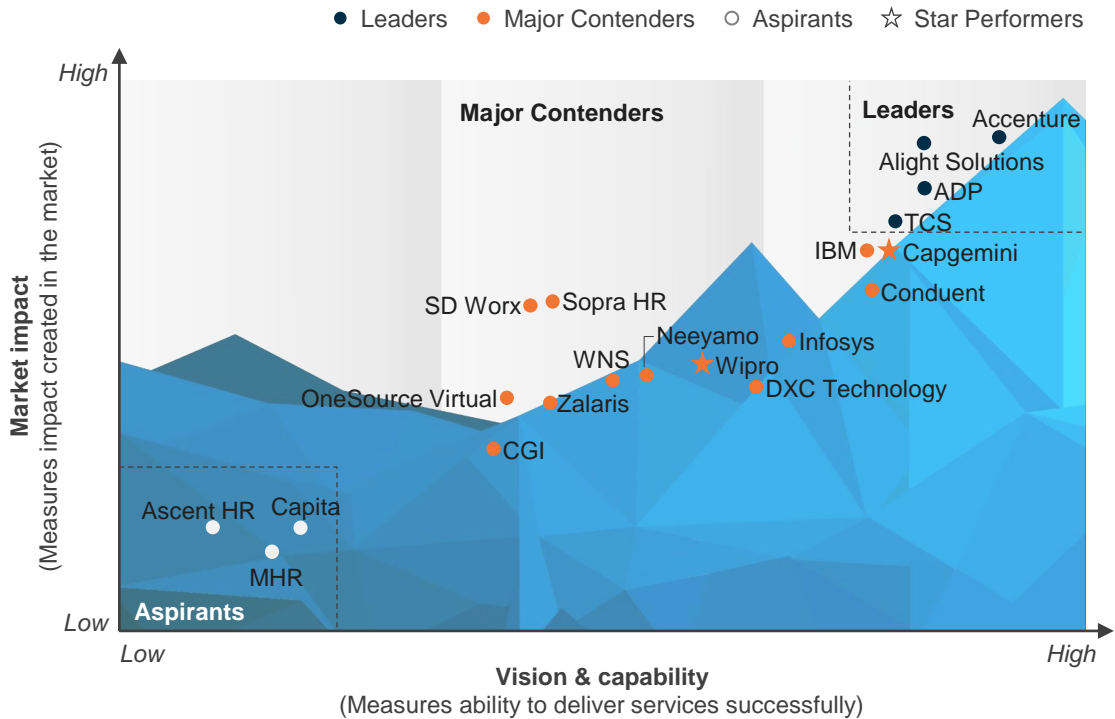
- This section provides the MPHRO provider landscape in terms of revenue, active deals, along with geographically dominant service providers
- The top four providers contributed more than 40% of the market share in terms of ACV

MPHRO provider delivery capability

- Everest Group delineates each of the 20 service provider's strengths and limitations
- 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 three distinct chapters providing a deep dive into key aspects of the MPHRO market; below are three charts to illustrate the depth of the report

MPHRO PEAK Matrix® Assessment 2021¹



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	○	○	○	○	○	○	○	○	○

Enterprise sourcing considerations

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 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 clients across multiple buyer segments

Limitations

- Service provider 1 should increase offerings of value-added services such as technology implementation and consulting
- It should try to expand into larger MPHRO deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

¹ Assessments for Capita, CGI, IBM, MHR and Zalaris excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with MPHRO buyers

Source: Everest Group (2021)

Research calendar

Human Resources Outsourcing (HRO)

Published Planned Current release

Flagship HRO reports

Release date

Multi-process Human Resources Outsourcing (MPHRO) – Service Provider Profile Compendium 2020	January 2020
Rewards and Recognition (Learning Services) Solutions PEAK Matrix® Assessment with Service Provider Landscape 2020	April 2020
Digital Adoption Platform (DAP) Products PEAK Matrix® Assessment with Service Provider Landscape 2020	July 2020
Learning Services PEAK Matrix® Assessment with Service Provider Landscape 2020	June 2020
Learning Services Provider Profile Compendium 2020	August 2020
Digital Adoption Platform (DAP) Products Provider Profile Compendium 2020	August 2020
Multi-country Payroll (MCP) Solutions PEAK Matrix® Assessment 2020	September 2020
Multi-country Payroll (MCP) Solutions Annual Report 2020	December 2020
Multi-country Payroll (MCP) Solutions Service Provider Profile Compendium 2020	December 2020
Multi-process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2021	January 2021
Multi-process Human Resources Outsourcing (MPHRO) Annual Report 2021	Q1 2021
Multi-process Human Resources Outsourcing (MPHRO) Service Provider Profile Compendium 2021	Q1 2021

Thematic HRO reports

Release date

Learning Function of the Future	December 2019
Digital Adoption Platform (DAP): Accelerating the Journey from Transformation to Adoption	February 2020
Impact of Recession on the Business Process Services (BPS) Industry	March 2020
Price Trends in HRO	September 2020

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