Customer Experience Management (CXM) in EMEA – Service Provider Landscape with PEAK Matrix® Assessment 2022

August 2022: Complimentary Abstract / Table of Contents

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Background and scope of the research

The Customer Experience Management (CXM) market in Europe, the Middle East, and Africa (EMEA) grew at an unprecedented pace in 2021. Buyers showed a greater propensity to outsource and shifted their priorities with heightened awareness of the importance of personalized CX in driving customer acquisition and retention and creating market differentiation. To provide an unparalleled personalized experience, organizations are pushing for digital customer experience management through a combination of digital tools, such as advanced analytics, intelligent automation, conversational AI, and omnichannel and agent-assist tools. There has also been a strong surge for transformation consulting services such as customer journey mapping and design thinking by enterprises to accelerate their digital transformation initiatives and achieve business continuity leading to scope expansion of existing CXM contracts. To effectively cater to these requirements, providers are developing capabilities through internal investments, their partnership ecosystem, and acquisitions. They are also setting up multilingual hubs across Europe to serve diverse language needs of this region.

In this research, we present detailed assessments of 25 CXM service providers in EMEA featured on the CXM Services PEAK Matrix® Assessment 2022. 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 2022, interactions with leading CXM service providers, client reference checks, and an ongoing analysis of the CXM services market.

This report includes the profiles of the following 25 leading CXM providers in EMEA featured on the CXM PEAK Matrix®:

- **Leaders:** Comdata Group, Concentrix, Majorel, Sitel Group®, Teleperformance, and Webhelp
- **Major Contenders:** Atento, Bosch Service Solutions, Capita, Conduent, EXL, Genpact, HGS, Infosys, Startek®, TCS, Tech Mahindra, TELUS International, Transcom, and TTEC
- **Aspirants:** CCI, Conectys, DXC Technology, IGT Solutions, and RAYA CX

Scope of this report

Geography
EMEA

Providers
25

Services
Customer Experience Management (CXM)

Overview and abbreviated summary of key messages

This report examines the 2022 Customer Experience Management (CXM) service provider landscape in the EMEA region and provides an analysis of providers' key strengths and limitations. It focuses on provider position and growth in the CXM market, changing market dynamics and emerging provider trends, and assessment of provider delivery capabilities. It also identifies the key implications of the research findings for buyers and providers.

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

CXM service provider landscape in EMEA and PEAK Matrix® 2022
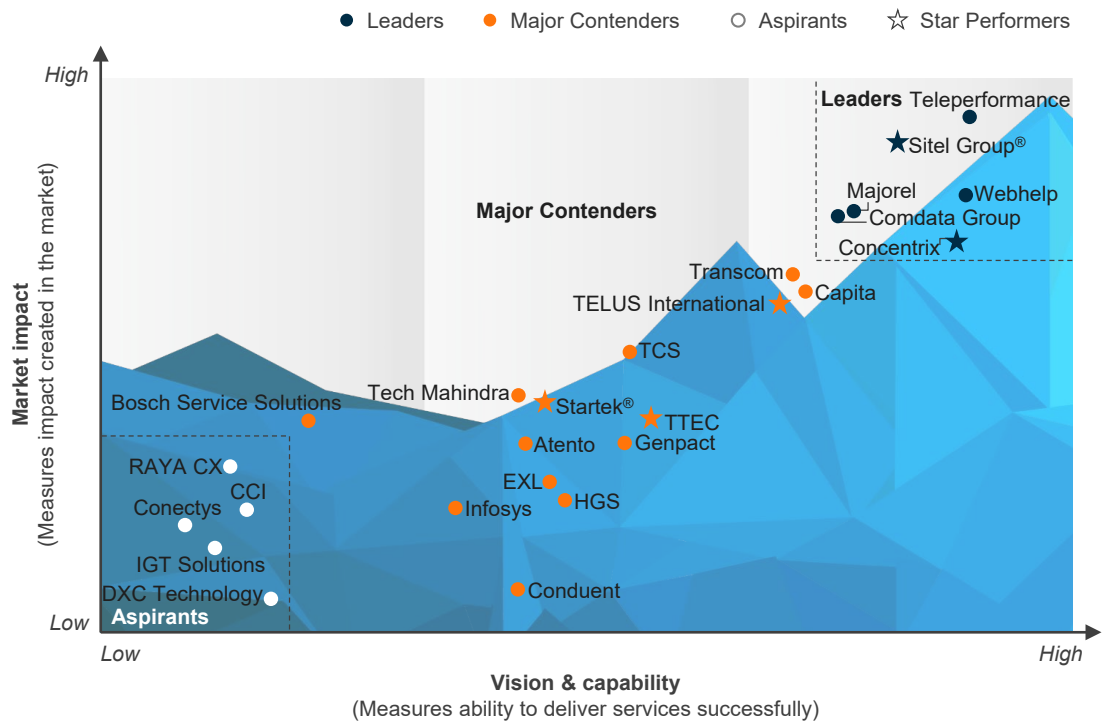
- The 2022 EMEA CXM PEAK Matrix® positioning is as follows:
  - **Leaders:** Comdata Group, Concentrix, Majorel, Sitel Group®, Teleperformance, and Webhelp
  - **Major Contenders:** Atento, Bosch Service Solutions, Capita, Conduent, EXL, Genpact, HGS, Infosys, Startek®, TCS, Tech Mahindra, TELUS International, Transcom, and TTEC
  - **Aspirants:** CCI, Conectys, DXC Technology, IGT Solutions, and RAYA CX
- Based on the relative Year-on-Year (YoY) movement of each service provider, Everest Group identified three service providers as the **2022 CXM in EMEA Star Performers** – Concentrix, Sitel Group®, Startek®, TELUS International, and TTEC

Key insights on PEAK Matrix® dimensions

- Service providers in the EMEA region have experienced unprecedented growth in 2021. Digital disruption induced by the pandemic has brought about a drastic shift in enterprise behavior with an enhanced focus on digital customer experience management and business continuity planning
- There has been a surge in buyers demand for CX consulting services such as digital transformation consulting, design thinking, process consulting, workforce optimization, and customer journey mapping
- Leaders have been able to develop more sophisticated digital solutions and have been more successful than their peers in driving outcome-based pricing structures, agent engagement and talent management initiatives, and process innovation
- Leaders performed better than their peers across key KPIs showcasing their strength in service delivery and performance

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

CXM in EMEA – Service Provider Landscape with PEAK Matrix® Assessment 2022 — *Illustrative example*

Legend: ● Leaders   ● Major Contenders   ○ Aspirants   ☆ Star Performers

Market impact (Measures impact created in the market) — vertical axis (Low to High)

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

Leaders
- Teleperformance
- Sitel Group®
- Majorel
- Webhelp
- Comdata Group
- Concentrix

Major Contenders
- Transcom
- Capita
- TELUS International
- TCS
- Tech Mahindra
- Startek®
- TTEC
- Atento
- Genpact
- EXL
- HGS
- Infosys
- Bosch Service Solutions
- Conduent

Aspirants
- RAYA CX
- CCI
- Conectys
- IGT Solutions
- DXC Technology

Source: Everest Group (2022)

Capability assessment — *Illustrative example*

Measure of capability: ◔ Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Technology and innovation	Delivery footprint	Overall
Provider 1	◑	◔	◑	◑	◑	◔	◕	◑	◑
Provider 2	◔	◑	◑	◑	◔	◑	◕	◑	◔
Provider 3	◑	●	◑	◑	●	●	◕	◑	◑
Provider 4	◔	◑	◑	◑	●	◑	◑	◑	◑
Provider 5	◔	◑	◑	◑	◑	◑	◑	◑	◑
Provider 6	◑	◑	◑	◑	◑	◑	●	◑	◑
Provider 7	◑	◑	◑	◑	●	◑	●	◑	◑
Provider 8	◑	◔	◑	◑	◔	●	◑	◑	◑
Provider 9	◔	◔	◑	◑	●	◑	◕	◑	◔

Everest Group's remarks on providers — *Illustrative example*

Measure of capability: ◔ Low ● High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Technology and innovation	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

Limitations
- 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 a skilled workforce, and boosting more collaboration in their engagement as focus areas for Service provider 1

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Research calendar
Customer Experience Management (CXM) Services

	Published		Planned		Current release

Reports title	Release date
Delivering Happy Customers in the Experience Economy	March 2022
The Increasing Role of Bring Your Own Device (BYOD) in CXM – Trends, Challenges, and Opportunities	April 2022
Enterprise Technical Support	June 2022
Transforming Customer Experience (CX) Operations	July 2022
Catering to Global Customer Experience Management (CXM) Requirements: What It Means to Be a Truly Global Service Provider	July 2022
Customer Experience Management (CXM) in the Americas – Service Provider Landscape with PEAK Matrix® Assessment 2022	August 2022
Navigating the Digital CXM Transformation Journey	August 2022
Customer Experience Management (CXM) in APAC – Service Provider Landscape with PEAK Matrix® Assessment 2022	August 2022
Customer Experience Management (CXM) in EMEA – Service Provider Landscape with PEAK Matrix® Assessment 2022	**August 2022**
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2022	Q3 2022
Customer Experience Management (CXM) in the Americas – Service Provider Compendium 2022	Q3 2022
Customer Experience Management (CXM) in APAC – Service Provider Compendium 2022	Q3 2022
Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2022	Q3 2022
Conversational AI State of the Market Report 2022	Q4 2022
Customer Experience Management (CXM) in Healthcare – Service Provider Landscape with PEAK Matrix® Assessment 2022	Q4 2022

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