

Customer Experience Management (CXM) in EMEA – Provider Compendium 2023

November 2022: Complimentary Abstract / Table of Contents



Our research offerings

This report is included in the following research program(s):

Customer Experience Management Services

- ▶ Application Services
- ▶ Artificial Intelligence (AI)
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Conversational AI
- ▶ Customer Experience Management Services
- ▶ CX Excellence
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms (DAP)
- ▶ Digital Engineering Services
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Employee Experience Management (EXM) Platforms
- ▶ Employer of Record (EOR)
- ▶ Engineering Services
- ▶ Enterprise Platform Services
- ▶ Exponential Technologies
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ Global Business Services
- ▶ Healthcare Business Process
- ▶ Healthcare Information Technology
- ▶ Human Resources Outsourcing
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing (IDP)
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Executive Insights™
- ▶ Life Sciences Business Process
- ▶ Life Sciences Commercial Technologies
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Outsourcing Excellence
- ▶ Pricing Analytics as a Service
- ▶ Process Mining
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

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

Learn more about our
custom research capabilities

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations,
risk, technologies

Locations: costs, skills,
sustainability, portfolios

Contents

For more information on this and other research published by Everest Group, please contact us:

Shirley Hung, Partner

David Rickard, Vice President

Chhandak Biswas, Practice Director

Aishwarya Barjatya, Senior Analyst

Uday Gupta, Analyst

Rashi Garg, Data Specialist

1. Introduction and overview	05
• Research methodology	06
• Detailed description of processes within CXM	07
• Key sources of proprietary information	08
• Background and scope of the research	09
2. CXM in EMEA PEAK Matrix® characteristics	10
• PEAK Matrix framework	11
• Everest Group PEAK Matrix for CXM services in EMEA	12
• Characteristics of Leaders, Major Contenders, and Aspirants	15
• CXM Star Performers in EMEA	16
• Provider capability summary dashboard	18
3. Enterprise sourcing considerations	22
• Leaders	22
– Comdata Group	23
– Concentrix	30
– Majorel	37
– Sitel Group®	44
– Teleperformance	51
– Webhelp	58
• Major Contenders	65
– Atento	66
– Bosch Service Solutions	73

Contents

• Major Contenders (continued)	65
– Capita	80
– Conduent	87
– EXL	94
– Genpact	101
– HGS	108
– Infosys	115
– Startek®	122
– TCS	129
– Tech Mahindra	136
– TELUS International	143
– Transcom	150
– TTEC	157
• Aspirants	164
– CCI	165
– Conectys	172
– DXC Technology	179
– IGT Solutions	186
– RAYA CX	193
4. Appendix	200
• Glossary	201
• Research calendar	202

Introduction

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 [Customer Experience Management \(CXM\) in EMEA – Service Provider Landscape with 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 provides comprehensive and fact-based snapshots of 25 Customer Experience Management (CXM) service providers in EMEA. Each profile includes scale of operations, technology solutions, portfolio mix, and delivery locations, along with Everest Group’s PEAK Matrix® provider assessment.

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 five providers as the “**2022 CXM in EMEA Star Performers**” – Concentrix, Sitel Group®, Startek®, TTEC, and TELUS International

Profiles of CXM Leaders, Major Contenders, and Aspirants










Each service provider profile captures the following CXM-specific detail:

- Scale of operations including key leaders, recent developments including ESG initiatives, revenues, FTEs, and clients
- FTE split by delivery location, language, and process and revenue split by geography, industry, and buyer size
- Technology suite including key partnerships and brief descriptions of key proprietary solutions
- Key CXM clients including brief descriptions of key CXM engagements
- Detailed assessment of CXM capabilities on market impact and vision and capability parameters, along with remarks on each service provider’s strengths and limitations
- EMEA delivery locations: key delivery locations in EMEA

Provider | EMEA CXM profile (page 1 of 7)

Everest Group assessment – Aspirant

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

- Provider is a broad-based BPO service provider that specializes in catering to clients in the travel & hospitality and BFSI segments in English, Spanish, French, and Portuguese, and offers capabilities such as retail settlement, consumer lending, card processing & servicing, and check processing. It also offers stand-alone advisory services such as maturity assessments, sustainability consulting, operations optimization, journey mapping, persona identification, design thinking, conversation design, and automation orchestration
- It adds value to clients' digitalization journeys through services such as cloud migration, flexible operating platforms, business intelligence, enterprise data management, process mining, and systems integration. It aims to be a strategic partner for its clients, driven by its partnerships with Amazon Web Services and Microsoft for cloud-based omnichannel platforms and CCaaS solutions, and conversational AI vendors such as Amelia and Creative Virtual for contact deflection through self-service and personalized CX using a digital workforce of intelligent chatbots and digital assistants
- It has invested in a digital-first, work from anywhere model, with hyper-automation, self-service tools such as live chat and proactive outbound communication, cloud-native platforms, and continuous intelligence solutions. It has also invested in analytics, automation, and conversational AI factories

Provider | EMEA CXM profile (page 2 of 7)

Everest Group assessment – Aspirant

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
								

Limitations

- While the provider is well-established in the BFSI and travel & hospitality industry segments, it is relatively less experienced in fast-growing verticals such as technology, healthcare, and retail
- Even though it has the ability and experience to cater to buyers of all sizes, most of its clients are companies with revenue of more than US\$1 billion. Its ability to successfully cater to the demands of small enterprises is limited
- DXC Technology follows an onshore-centric model, which might not be as attractive to buyers looking for a balanced delivery mix and extensive offshore presence for cost optimization

Provider | EMEA CXM profile (page 3 of 7)

Overview

Company mission/vision statement

The provider helps global companies run their mission-critical systems and operations while modernizing IT, optimizing data architectures, and ensuring security and scalability across public, private, and hybrid clouds. It serves companies and public sector organizations to deploy services across the enterprise technology stack to drive new levels of performance, competitiveness, and CX.

Provider’s comprehensive suite of end-to-end customer experience management solutions brings together advisory expertise, global operational delivery capabilities, and technology delivered in a true Cloud-as-a-Service (CaaS) model. Its customer service experts apply data-driven insights to improve efficiency and experiences and help reduce costs through proactive, smarter engagement. Its domain experts in banking and insurance champion trust and compliance with personalized service.

Headquarters:

Website:

Key leaders

- **Leader 1:** President and Chief Executive Officer
- **Leader 2:** President, Insurance Software and Business Process Services

- **Leader 3:** Global Offering Leader, BPS

Recent developments:

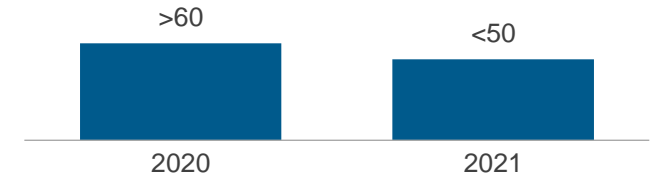
- Provider deploys cloud-based omnichannel platform, AWS Connect
- Provider adopts a digital-first equipped to work from anywhere model
- It supports 500+ million customer interactions every year
- About 99% of customer service agents are enabled for remote **work from anywhere**

ESG Initiatives:

- Digitization of the circular economy
- Data-driven sustainability consulting services aligned with customers’ demands
- Distributed Ledger Technology (DLT), geospatial technology, and Internet of Things (IoT) provide immutable records and the digital verification of physical environments and objects

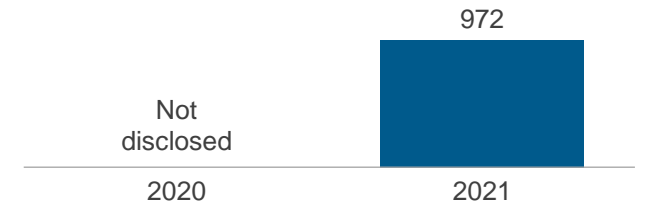
EMEA CXM revenue

In US\$ million



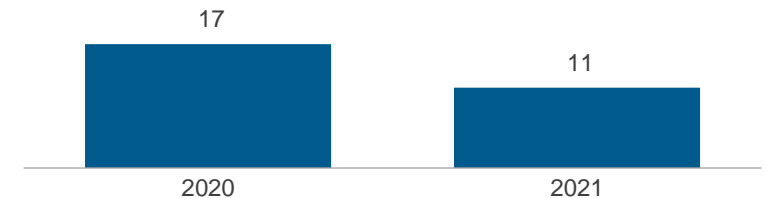
Scale of EMEA CXM

Number of agents



EMEA CXM client base

Number of clients



Provider | EMEA CXM profile (page 4 of 7)

Capabilities

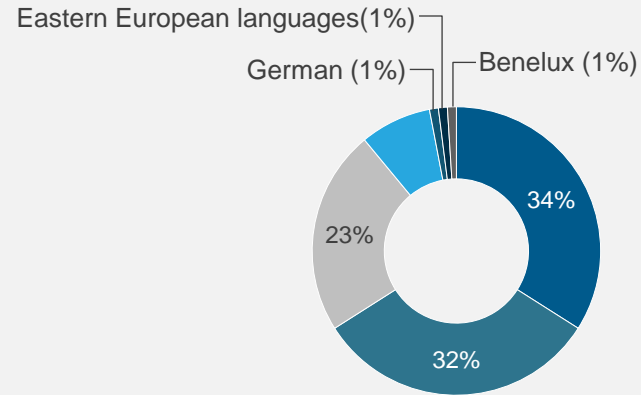
Split of EMEA CXM FTEs
Number of FTEs

By location

Not disclosed

Split of EMEA CXM FTEs
Number of FTEs

By language



EMEA CXM revenue mix
US\$ million

By process

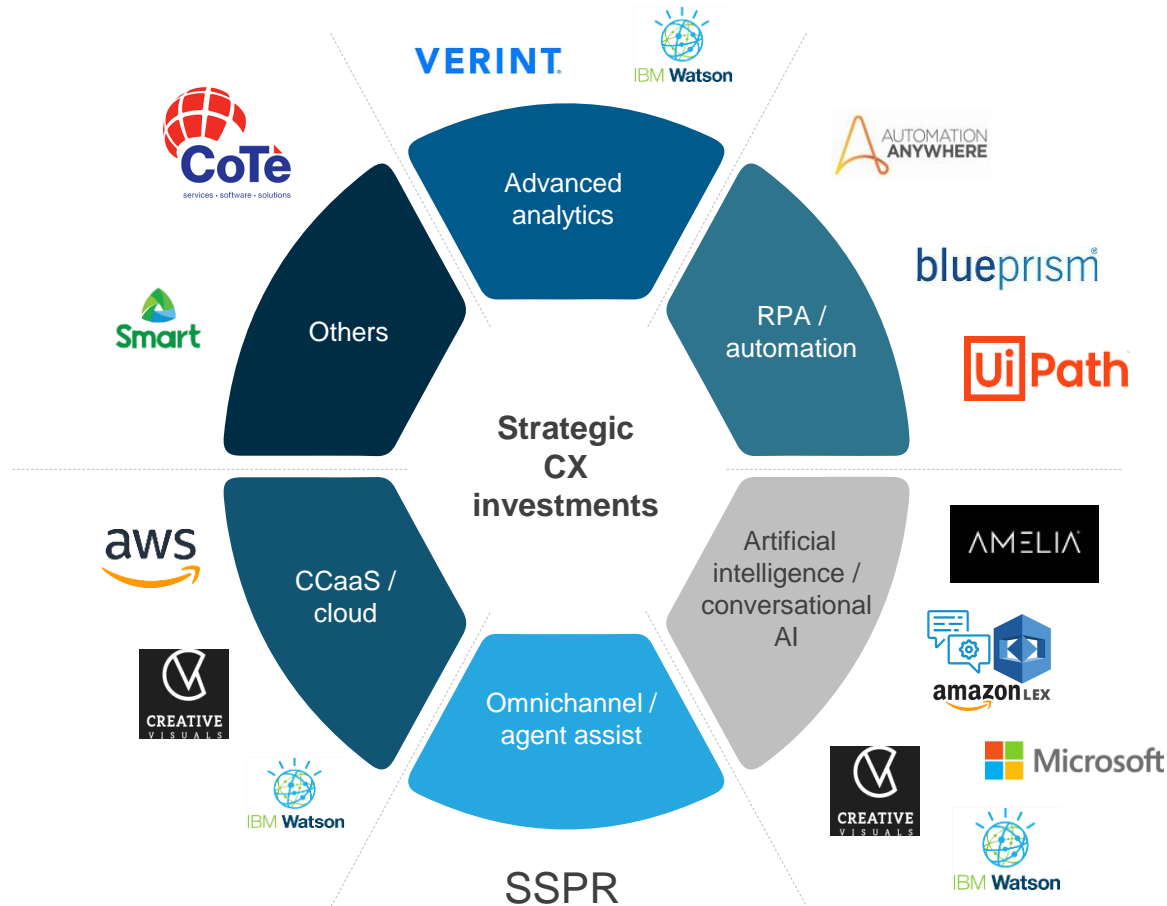
Not disclosed

Note: High-cost regions include Germany, France, UK/Ireland, Spain, Portugal, Benelux, the Nordics, and Italy and Medium/Low-cost regions include Eastern Europe, the Middle East and Africa, and others (such as India and the Philippines)

Provider | EMEA CXM profile (page 5 of 7)

Key CXM investments | proprietary solutions and partnerships

Key partnerships



Key proprietary solutions

Solution 1	It helps customer to build relationships by connecting work, data, and experiences across the enterprise.
Solution 2	Provides self-service adoption rates with its conversational AI solution based on IBM Watson.
Solution 3	It provides conversational AI services based on AMELIA's market-leading cognitive platform.
Solution 4	UiPath is a global software company that makes RPA software.
Solution 5	Automation Anywhere is an American global software company that develops RPA software.
Solution 6	It is an enterprise RPA software designed to provide a digital workforce with the ability to automate complex, end-to-end operational activities.
Solution 7	Microsoft SSPR enables users to reset their passwords without contacting IT staff for help (self-service password reset).
Solution 8	It provides Customer Experience Management (CXM) cloud SaaS solution applications.
Solution 9	Amazon Connect gives provider the ability to more easily integrate with modern CRM and workplace management systems
Solution 10	Self-service adoption rates with provider's conversational AI solution based on IBM Watson.
Solution 11	Conversational AI services based on Creative Virtual's industry-leading V-Person technology and V-Portal platform.

Provider | EMEA CXM profile (page 6 of 7)

Client portfolio

EMEA CXM revenue mix US\$ million

By geography	By industry	By buyer size
Not disclosed	Not disclosed	Not disclosed

Key customer experience engagements

Client name	Region	Client since
Client 1	EMEA	2010

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	September 2022
Customer Experience Management (CXM) in APAC – Service Provider Compendium 2022	November 2022
Customer Experience Management (CXM) in EMEA – Service Provider Compendium 2023	November 2022
Customer Experience Management (CXM) in the Americas – Service Provider Compendium 2023	Q4 2022
Conversational AI State of the Market Report 2023	Q4 2022
Customer Experience Management (CXM) in Healthcare – Service Provider Landscape with PEAK Matrix® Assessment 2023	Q4 2022

Note: [Click](#) to see a list of all of our published CXM reports



Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our research also covers the technologies that power those processes and functions and the related talent trends and strategies. Our clients include leading global companies, service and technology providers, and investors. Clients use our services to guide their journeys to maximize operational and financial performance, transform experiences, and realize high-impact business outcomes. Details and in-depth content are available at www.everestgrp.com.

Stay connected

Website

everestgrp.com

Social Media

-  @EverestGroup
-  @Everest Group
-  @Everest Group
-  @Everest Group

Blog

everestgrp.com/blog

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto

canada@everestgrp.com
+1-647-557-3475

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.