

Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2022

March 2022: Complimentary Abstract / Table of Contents



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Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Source of information

This report is based on multiple key sources of proprietary information

- Proprietary database of over 1500+ 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 learned and best practices

Service providers assessed¹



¹ Assessments for Capita, CGI, 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 (MPHRO) market experienced a growth resurgence in 2021. The market has recovered from the short-term disruption and is highly likely to experience growth in future because of the increased push toward large digital transformation initiatives being undertaken by enterprises, need for supporting hybrid working models in the new normal, and the focus on overall experience. These drivers are in addition to the traditional outsourcing drivers including the need for cost takeout, managing transaction volume management, and bringing in domain expertise.

Due to the ongoing talent shortage, there is a push to develop skills and have a future-ready workforce. Buyers are looking for more end-to-end HR outsourcing deals that include talent acquisition and development, keeping employee experience at the core. Buyers are also looking to adopt financial wellness solutions and are looking to have a more local experience for payroll and regulatory and compliance, thus driving the market growth. Apart from the high demand for HR services from the traditional markets of North America and Europe, the emerging Asia Pacific (APAC) and Latin American (LATAM) geographies continue to exhibit strong growth. The service providers, along with continued investments in bringing next-generation technologies, automation, and analytics, have also invested in adding an experience layer to their products and strive to provide a seamless, integrated experience to its users. They have also focused on partnering with their clients and help them throughout their HR transformation journeys, right from designing the solution to implementing it, in order to add business value. 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 the 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® 2022 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 19 HRO service providers with multi-process capability: Accenture, ADP, Alight Solutions, Ascent HR, Capgemini, Capita, CGI, Conduent, IBM, Infosys, MHR, Neeeyamo, OneSource Virtual, SD Worx, Sopra HR, TCS, Wipro, WNS, and Zalaris



Services
MPHRO services

Overview and summary of key messages

This report examines the global MPHRO market and its provider landscape. Based on the comprehensive Everest Group PEAK Matrix framework, it studies 19 MPHRO providers and classifies them as Leaders, Major Contenders, and Aspirants based on their market impact and vision & capability. Additionally, this report contains Everest Group's deep-dive analysis of each provider's strengths and limitations.

The key findings of this report are:

Service provider positioning

- Everest Group positions 19 MPHRO providers on the Everest Group PEAK Matrix and classifies them into Leaders, Major Contenders, and Aspirants
- The 2022 MPHRO PEAK Matrix positioning is as follows:
 - **Leaders:** Accenture, ADP, Alight Solutions, IBM, and TCS
 - **Major Contenders:** Capgemini, CGI, Conduent, Infosys, Neeyamo, OneSource Virtual, SD Worx, Sopra HR, Wipro, WNS, and Zalaris
 - **Aspirants:** Ascent HR, Capita, and MHR

Provider landscape

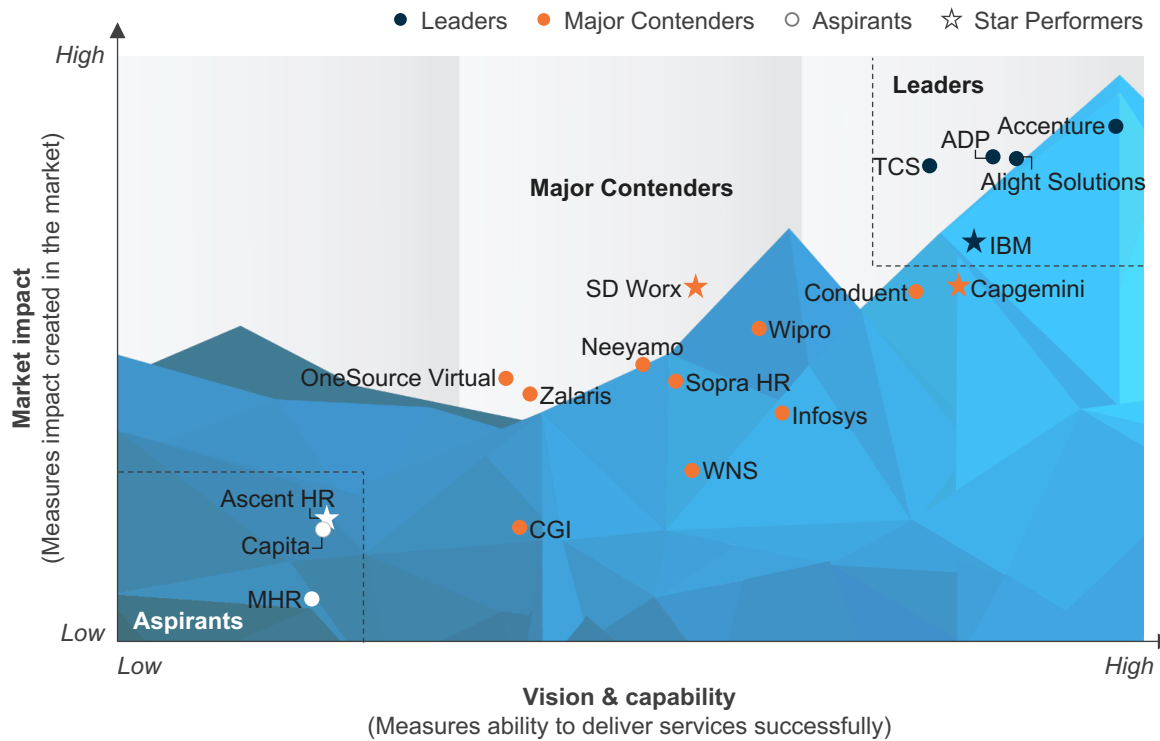
- This section provides an overview of the MPHRO provider landscape in terms of revenue, active deals, and dominance by geography
- The top five providers accounted for more than 45% of the market share in terms of Annual Contract Value (ACV)

MPHRO providers' delivery capabilities

- The report examines each of the 19 providers' strengths and limitations
- The in-depth commentary will help providers, enterprise buyers, and other stakeholders understand the provider landscape and how it will likely shape in the future

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 2022¹



¹ Assessments for Capita, CGI, 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.

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: 🔄 Low ● High

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
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	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

Research calendar

Human Resources Outsourcing (HRO)

Published Planned Current release

Flagship reports

Release date

Employee Experience Management (EXM) Platforms Products PEAK Matrix® Assessment 2022 with Technology Vendor Landscape	March 2022
Multi-Process Human Resources Outsourcing (MPHRO) Services PEAK Matrix® Assessment 2022	March 2022
Multi-Process Human Resources Outsourcing (MPHRO) Annual Report 2022	Q2 2022
Multi-Process Human Resources Outsourcing (MPHRO) Service Provider Profile Compendium 2022	Q2 2022
Employee Experience Management (EXM) Technology Vendor Profile Compendium 2022	Q2 2022
Employee Experience Management (EXM) State of the Market Report 2022	Q2 2022
Learning Experience Platforms (LXP) PEAK Matrix® Assessment 2022 with Technology Vendor Landscape	Q3 2022
Learning Experience Platforms (LXP) Technology Vendor Profile Compendium 2022	Q3 2022

Thematic reports

Release date

Employee Experience Management (EXM) platforms: Enabling a holistic, agile, and adaptive employee experience	May 2021
Payroll 4.0: A New Era for Global Payroll	July 2021
Human Resource Outsourcing (HRO) 4.0: Reinventing the HR Function	Oct 2021
Multi-Country Payroll Consolidation Demystified: Key Considerations for an Employee-Centric Payroll	Nov 2021
Learning Experience Platforms (LXPs): Going Beyond the Learning Mandate (Tentative title)	Q2 2022
The Payroll Transformation Journey: Traveling Light in Long-tail Countries (Tentative title)	Q1 2022

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



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