Everest Group®

Everest Group PEAK MATRIX® Catalyst™

Global In-house Center-focused (GIC-focused) Capabilities – Provider PEAK Matrix® Assessment 2023

August 2023: Complimentary Abstract / Table of Contents

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Background of the research

As global in-house centers (GICs) gain traction worldwide, enterprises are seeking insights into how to effectively leverage providers to grow their GICs. This pursuit has gained greater significance in today's turbulent economic climate, where enterprises grapple with substantial talent and cost pressures. In their endeavor to cultivate or expand their in-house delivery capabilities, enterprises are increasingly open to receiving assistance from providers. Within this context, enterprises can seek provider support in three primary areas: establishing GICs (largely through assisted, joint venture, and build-operate-transfer models), carving out GICs, and transforming GICs. In order to assess the different capabilities offered by providers in this space, we have undertaken an in-depth analysis of key providers across all three service areas.

In this research, we present the assessment of 12 providers featured on the GIC-focused Capabilities – Provider PEAK Matrix, a comprehensive matrix that evaluates and categorizes providers in terms of their GIC-focused capabilities.

The assessment is based on Everest Group's annual Request for Information (RFI) process, interactions with leading providers, client reference checks, and an ongoing analysis of the market

This report includes the profiles of the following 12 providers featured on the GIC-focused Capabilities – Provider PEAK Matrix:

- **Leaders:** Accenture, IBM, Infosys, and TCS
- **Major Contenders:** Capgemini, Genpact, HCL, Mphasis, Persistent Systems, and Wipro
- **Aspirants:** WNS and Zensar

Scope of this report

Geography
Global

Providers
12

Services
GIC-focused services (i.e., GIC setup, GIC carve-out, GIC transformation)

Summary of key messages

This report examines the GIC-focused capabilities of 12 global providers. The research uses Everest Group's proprietary PEAK Matrix framework to evaluate provider capabilities across two key dimensions – market impact and vision & capability. It also includes an assessment of the providers' key strengths, areas of improvement, and capabilities.

The key findings of this report are:

GIC-focused Capabilities – Provider PEAK Matrix 2023

Everest Group positions 12 providers on the Everest Group Services PEAK Matrix and classifies them into:

- **Leaders:** Accenture, IBM, Infosys, and TCS
- **Major Contenders:** Capgemini, Genpact, HCL, Mphasis, Persistent Systems, and Wipro
- **Aspirants:** WNS and Zensar

Provider landscape

- Providers that have developed GIC-focused capabilities can be categorized as Leaders, Major Contenders, and Aspirants based on the market impact-vision & capability matrix
- Leaders differentiate themselves through their structured and programmatic approach to the GIC market, dedicated delivery and sales teams focused on the GIC market segment, and by well-defined playbooks for different types of GIC deals, such as setups, carve-outs, and transformation
- Major Contenders focus on delivering one or two of the three key GIC service offerings in a targeted manner; these providers generally support enterprises headquartered in North America and Europe
- Aspirants typically have a reactive approach to the GIC market and are not proactively looking to grow their GIC clientele. These providers largely rely on RFPs to gain GIC clients and do not have a separate playbook for GIC deals vs. outsourcing deals, even though the structural dynamics of these deals are fundamentally different

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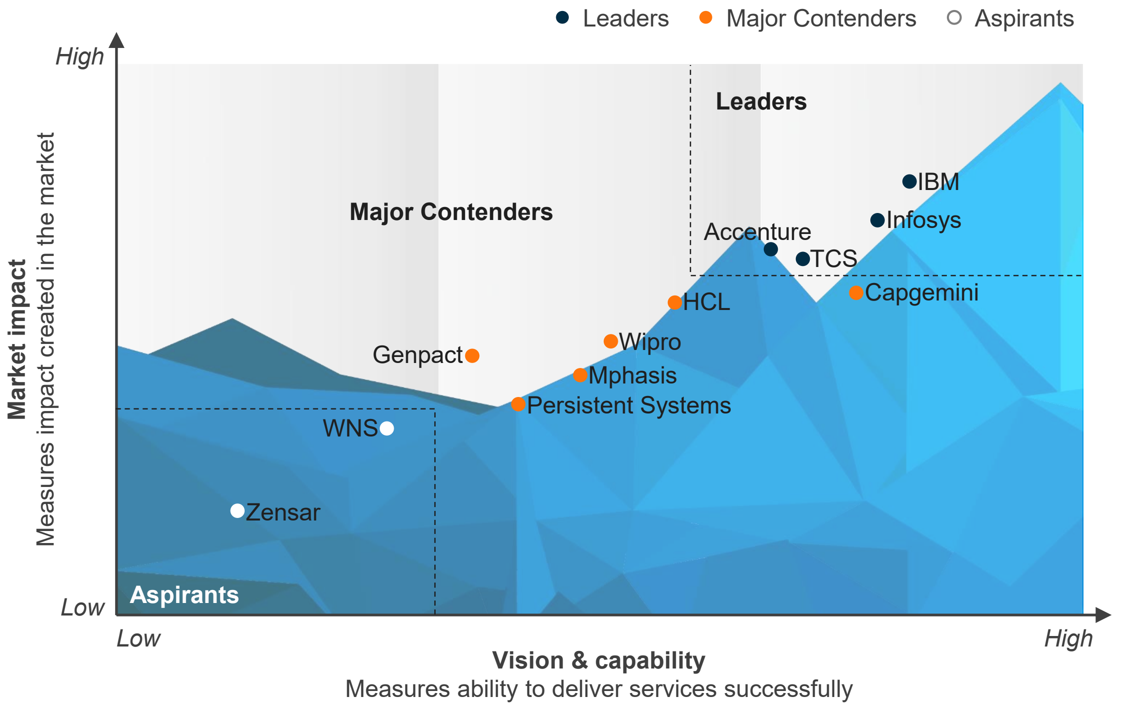
This study offers three distinct chapters providing a deep dive into key aspects of GIC-focused capabilities of providers; below are three charts to illustrate the depth of the report

Everest Group GIC-focused Capabilities – Provider PEAK Matrix Assessment 2023[1,2]



1 Assessments for IBM, TCS, Accenture, Capgemini, HCL, Wipro, Genpact, WNS, and Zensar exclude provider inputs and are based on Everest Group's proprietary database, provider public disclosures, and Everest Group's interactions with buyers

2 Analysis for Infosys, Mphasis, and Persistent Systems includes partial inputs from the provider and is based on Everest Group's estimates that leverage Everest Group's proprietary data assets, providers' public disclosure, and interactions with buyers

Source: Everest Group (2023)

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	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

- Comprehensive set of offerings supporting enterprises with GIC setups and transformation; some of the key services offered include Design-build-operate-transfer (DBOT) and virtual GIC models to set up new GICs and assisted transformation services (with a focus on automation) for existing GICs
- Evidence of supporting enterprises from diverse industries such as automotive, retail, FMCG, pharmaceutical, industrial products, electronics, and BFSI

Limitations

- Offerings are typically more suited for larger enterprises
- Speed-to-market may get impacted because of Provider 1's strategy of developing dedicated teams for each work activity (as compared to a few other providers that use resources in a more fungible manner across different projects); this approach potentially also leads to longer project timelines

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Research calendar

Catalyst™

Published | Planned | Current release

Reports title	Release date
Global In-house Center-focused Capabilities – Provider PEAK Matrix Assessment 2023	**August 2023**
The Resurgence of the Build-Operate-Transfer (BOT) Sourcing Construct	Q3 2023
Exploring GIC Setup Capabilities – Renewed Provider Approach	Q4 2023
GIC Landscape for Providers	Q4 2023
Exploring GIC Digital Transformation Capabilities: Renewed Provider Approach	Q4 2023

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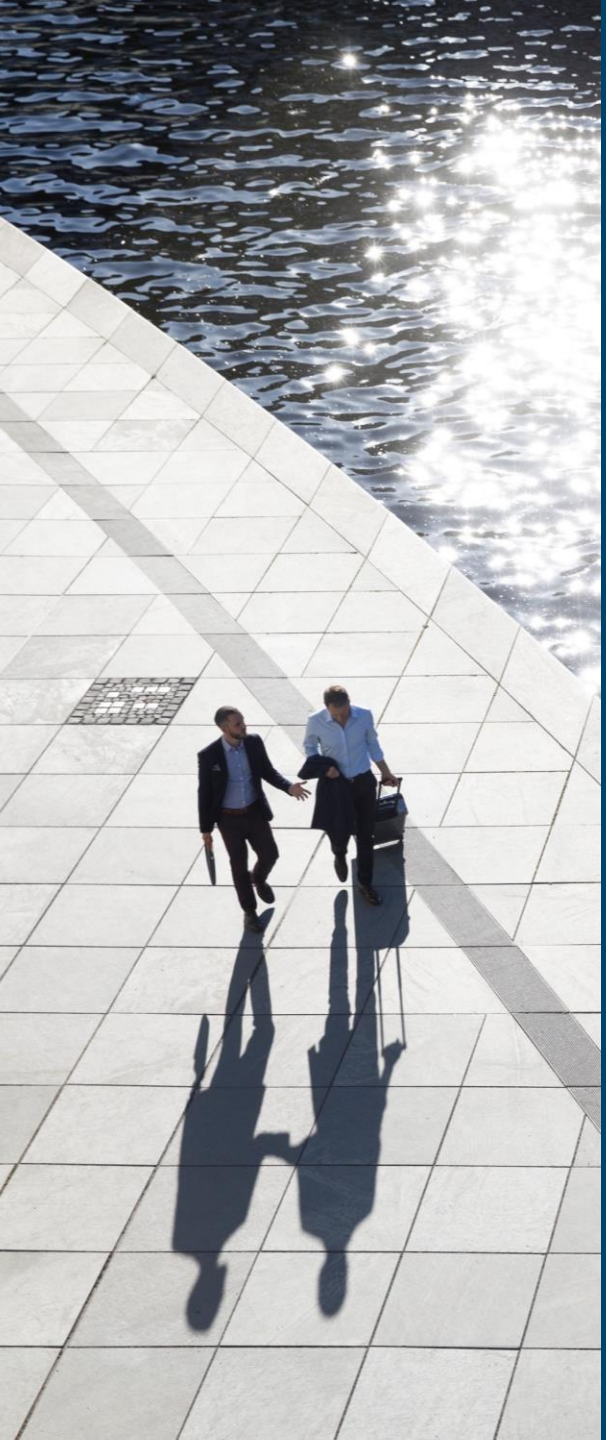

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