



## **Services Procurement – Service Provider Landscape with PEAK Matrix® Assessment 2020: Unlocking the True Potential of Services Procurement**

Contingent Workforce Management (CWM) Services  
Market Report – April 2020: Complimentary Abstract / Table of Contents

# Our research offerings for global services

<ul style="list-style-type: none"> <li>▶ Market Vista™ Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available</li> </ul>	
<ul style="list-style-type: none"> <li>▶ Application Services</li> </ul>	<ul style="list-style-type: none"> <li>▶ Human Resources</li> </ul>
<ul style="list-style-type: none"> <li>▶ BPS   Banking &amp; Financial Services</li> </ul>	<ul style="list-style-type: none"> <li>▶ ITS   Banking &amp; Financial Services</li> </ul>
<ul style="list-style-type: none"> <li>▶ BPS   Healthcare &amp; Life Sciences</li> </ul>	<ul style="list-style-type: none"> <li>▶ ITS   Healthcare</li> </ul>
<ul style="list-style-type: none"> <li>▶ BPS   Insurance</li> </ul>	<ul style="list-style-type: none"> <li>▶ ITS   Insurance</li> </ul>
<ul style="list-style-type: none"> <li>▶ Catalyst™</li> </ul>	<ul style="list-style-type: none"> <li>▶ IT Services Executive Insights™</li> </ul>
<ul style="list-style-type: none"> <li>▶ Cloud &amp; Infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>▶ ITS   Life Sciences</li> </ul>
<ul style="list-style-type: none"> <li>▶ Customer Experience Management Services</li> </ul>	<ul style="list-style-type: none"> <li>▶ Locations Insider™</li> </ul>
<ul style="list-style-type: none"> <li>▶ Data &amp; Analytics</li> </ul>	<ul style="list-style-type: none"> <li>▶ PricePoint™</li> </ul>
<ul style="list-style-type: none"> <li>▶ Digital Services</li> </ul>	<ul style="list-style-type: none"> <li>▶ Procurement</li> </ul>
<ul style="list-style-type: none"> <li>▶ Engineering Services</li> </ul>	<ul style="list-style-type: none"> <li>▶ Recruitment &amp; Talent Acquisition</li> </ul>
<ul style="list-style-type: none"> <li>▶ Enterprise Platform Services</li> </ul>	<ul style="list-style-type: none"> <li>▶ Service Optimization Technologies</li> </ul>
<ul style="list-style-type: none"> <li>▶ Finance &amp; Accounting</li> </ul>	

## More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- PriceBook
- Virtual Roundtables
- Workshops

## 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

## Membership information

- This report is included in the following research program(s)
  - [Contingent Workforce Management \(CWM\) Services](#)
- 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](mailto:info@everestgrp.com)

# Table of contents (page 1 of 2)

Topic	Page no.
Introduction and overview	5
Summary of key messages	8
<b>Section I: Services Procurement PEAK Matrix® 2020</b>	<b>10</b>
• Summary	11
• Services procurement PEAK Matrix	15
• Service provider assessment	16
<b>Section II: Key insights on services procurement market</b>	<b>23</b>
<b>Section III: Everest Group remarks on services procurement providers</b>	<b>36</b>
• AgileOne	37
• Allegis Global Solutions	38
• Brainnet	39
• Geometric Results, Inc.	40
• Guidant Global	41
• Hays Talent Solutions	42
• HCMWorks	43
• KellyOCG	44
• Pontoon Solutions	45
• PRO Unlimited	46
• Randstad Sourceright	47
• Resource Solutions	48

# Table of contents (page 2 of 2)

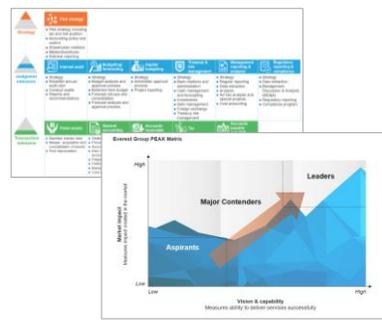
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Topic	Page no.
<b>Section III: Everest Group remarks on services procurement providers (continued)</b>	
• Talent Solutions TAPFIN (ManpowerGroup).....	49
• Volt Consulting Group.....	50
• Workforce Logiq.....	51
• Workspend.....	52
<b>Appendix</b> .....	<b>53</b>
• Glossary of key terms.....	54
• Research calendar.....	55
• References.....	56

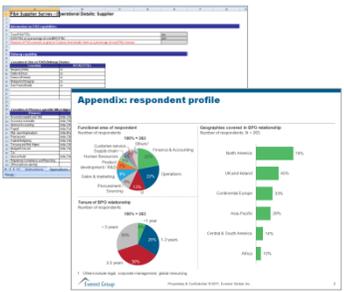
# Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

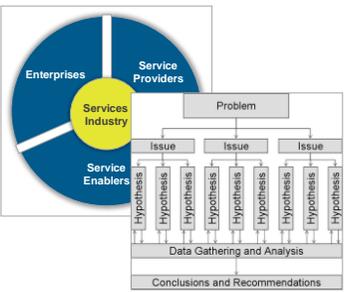
**1 Robust definitions and frameworks**  
 (Function-specific pyramids – Human Resource Outsourcing (HRO), Total Value Equation (TVE), capability-success matrix, and market maturity)



**2 Primary sources of information**  
 (Annual contractual and operational RFIs, service provider briefings and buyer interviews, and web-based surveys)



**3 Diverse set of market touchpoints**  
 (Ongoing interactions across key stakeholders, inputs from a mix of perspectives and interests, supports both data analysis and thought leadership)



**4 Fact-based research**  
 (Data-driven analysis with expert perspectives, trend analysis across market adoption, contracting, and service providers)



- Proprietary contractual database with detailed information of ~16 MSP providers
- Round the year tracking of all the service providers in the Services Procurement market
- Dedicated team for Services Procurement research, spread over two continents
- Twenty years of advising clients on BPO-related decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

# Everest Group's services procurement research is based on three key sources of proprietary information

- Everest Group's proprietary database of over **1,500 MSP & services procurement deals** (updated annually)
- The database tracks the following elements of each MSP deal:
  - Buyer details including industry, size, location, and signing region
  - Deal details including ACV, term, start date, spend managed, primary pricing structure, process coverage, and geographic coverage (at country level)
  - Technology ownership and maintenance
  - Global sourcing

- Everest Group's proprietary database of **operational capability of 16 MSPs** (updated annually)
- The database tracks the following capability elements for each service provider:
  - Services procurement managed spend
  - Services procurement clients and service suite
  - Recent services procurement-related developments (investments and partnerships)
  - Services procurement spend split by geography and category
  - Services procurement technologies leveraged
  - Services procurement process coverage

Ongoing buyer surveys and interactions

- Everest Group's **executive interviews and data collection from services procurement buyers**
- The data contains the following detailed buyer perspectives about MSP deals:
  - Drivers for adopting MSP and buyer-provider relationships
  - The level of buyer satisfaction and the underlying reasons

**The analysis in this report is presented at two levels:**

- Overall market analysis that highlights the market composition/dynamics
  - The current market trends based on deal activities in the last five years
- The sample size varies for different analyses based on the availability of deal details

## Service providers assessed<sup>1</sup>



Note: The terms services procurement and Statement Of Work (SOW) are synonymous for this study

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

# Overview and abbreviated summary of key messages

This report examines the services procurement provider landscape market. 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, 16 services procurement providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group's remarks on each service provider's strengths and areas of improvement.

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

## Service provider position and growth

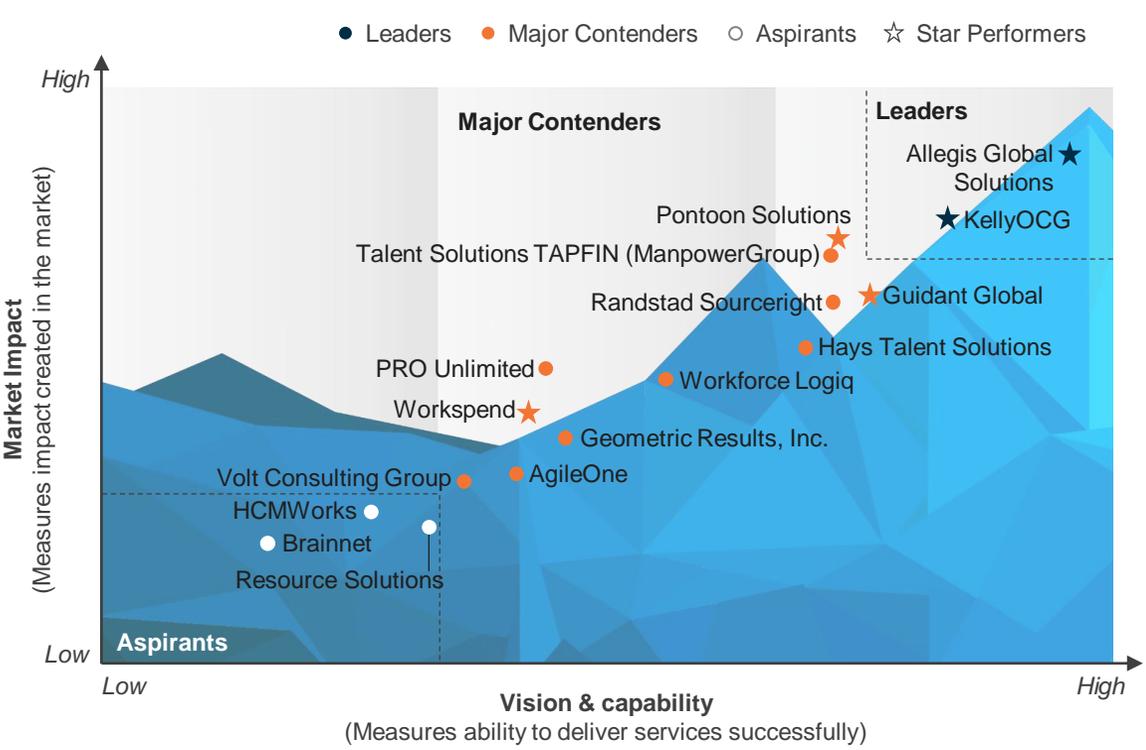
- Everest Group classifies services procurement service providers based on the Everest Group PEAK Matrix into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 16 established services procurement service providers evaluated are segmented into three categories (in alphabetical order within each category):
  - **Leaders:** Allegis Global Solutions and KellyOCG
  - **Major Contenders:** AgileOne, Geometric Results, Inc., Guidant Global, Hays Talent Solutions, Talent Solutions TAPFIN (ManpowerGroup), Pontoon Solutions, PRO Unlimited, Randstad Sourceright, Volt Consulting Group, Workforce Logiq, and Workspend
  - **Aspirants:** Brainnet, HCMWorks, and Resource Solutions

## Services procurement service provider commentary

- Everest Group delineates each of the 16 service providers' strengths and areas of improvement
- 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 services procurement market; below are three charts to illustrate the depth of the report

## Everest Group Services Procurement PEAK Matrix® Assessment 2020



Note: Assessment for Brainnet and HCMWorks among Aspirants, and AgileOne, Geometric Results, Inc., PRO Unlimited, Talent Solutions TAPFIN (ManpowerGroup), Volt Consulting Group, and Workforce Logiq among Major Contenders is based on Everest Group estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage & public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete

Source: Everest Group (2020)

## 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	○	○	○	○	○	○	○	○	○

## Everest Group's remarks on service providers

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 multi-country as well as single-country clients across the world
- Areas of improvement**
- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
  - It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

# Research calendar – Contingent Workforce Management (CWM)

Published
  Planned
  Current release

## Flagship RPO reports Release date

Managed Service Provider (MSP) Service Provider Landscape with PEAK™ Matrix Assessment 2019.....	June 2019
Managed Service Provider (MSP) – Service Provider Profile Compendium 2019.....	September 2019
Managed Service Provider (MSP) Annual Report 2020: Leading Through Disruption.....	October 2019
<b>Services Procurement – Service Provider Landscape with PEAK Matrix® Assessment 2020: Unlocking the True Potential of Services Procurement.....</b>	<b>April 2020</b>
CWM – Service Provider Landscape with Services PEAK Matrix® Assessment 2020 .....	Q2 2020
Services procurement – Service Provider Profile Compendium 2020.....	Q2 2020
CWM State of the Market Report 2020.....	Q3 2020
CWM – Service Provider Profile Compendium 2020 .....	Q3 2020
Total Talent Acquisition (TTA) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020 .....	Q3 2020

## Thematic RPO reports

In pursuit of best in class MSP program .....	January 2020
Reshape Services Procurement with analytics – An enterprise guide to unleashing power of data in Services Procurement .....	Q2 2020
Contingent Workforce Management (CWM) – Enterprise Pulse 1 .....	Q2 2020
Contingent Workforce Management (CWM) – Enterprise Pulse 2 .....	Q2 2020

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

## Additional MSP research recommendations

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The following documents are recommended for additional insight into the topic covered in this research. The recommended documents either provide additional details or complementary content that may be of interest

- 1. In Pursuit of a Best-in-class MSP Program** ([EGR-2020-25-V-3527](#)); 2019. Today's workforce is undergoing significant change, with an increasing number of people choosing to work as contingent workers. This contingent workforce goes well beyond low-skilled labor, including individuals who possess specialized skill sets, opting to work as contractors, freelancers, or independent consultants. However, enterprises' contingent workforce MSP programs are not transforming to keep pace with workforce changes. In fact, most enterprises are unable to unlock benefits beyond the basic cost savings. This viewpoint sheds light on how enterprises, in partnership with their MSPs, can extract next-level operational and business benefits from their contingent workforce, over and above the existing cost-savings.
- 2. Managed Service Provider (MSP) Annual Report 2020: Leading Through Market Disruption** ([EGR-2019-25-R-3364](#)); 2019. The global Managed Service Provider (MSP) market is growing steadily on the back of rising demand for contingent workforce across geographies and industries. It experienced a growth rate of 13% in 2018, particularly in the emerging market of Europe, Middle East, & Africa (EMEA), backed by an ever-increasing demand for temporary workers, increasing adoption of services procurement, total talent acquisition, direct sourcing, and emergence of the gig economy. In this research, we categorize MSP market growth across three dimensions: acceleration of the MSP market, widening of the MSP market, and deepening of the MSP market
- 3. Services Procurement – Service Provider Landscape with PEAK Matrix™ Assessment 2019** ([EGR-2019-25-R-3352](#)); 2019. While temporary labor still constitutes a major chunk of the MSP managed spend, services procurement has managed to garner a significant share in the past few years and its share in the total spend managed by MSPs is steadily increasing. As the MSP market matures, more and more buyers are entrusting MSPs to manage the spend categories beyond just the traditional temporary labor management. In this research, we analyze the services procurement service provider landscape across the following dimensions: Services procurement PEAK Matrix for 2018 and service provider capability assessment

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## About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at [www.everestgrp.com](http://www.everestgrp.com).

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