



Procurement Outsourcing (PO) BPO – Service Provider Profile Compendium 2019

Procurement Outsourcing (PO)

Market Report – July 2019: Complimentary Abstract / Table of Contents

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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

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Overview and abbreviated summary of key messages

The Procurement Outsourcing (PO) BPO Service Provider Profile Compendium 2019 provides key stakeholders a snapshot of the offerings and capabilities of the major PO service providers. While providers will be able to benchmark their areas of strength and those of development vis-à-vis other service providers in the marketplace, buyers and potential buyers of PO will be able to assess the service providers with desired set of capabilities.

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

2019 PO PEAK Matrix and Star Performers

- Everest Group classified 16 PO service providers on the Everest Group PEAK Matrix™ into the three categories of Leaders, Major Contenders, and Aspirants:
 - Leaders: Accenture, GEP, IBM, and Infosys
 - Major Contenders: Capgemini, Chain IQ, Cognizant, Corbus, Exela Technologies, Genpact, HCL, TCS, Wipro, and WNS
 - Aspirants: Aegis and Aquanima
- Based on Year-on-Year (YOY) movement of different service providers on the PEAK Matrix, Everest Group identified four service providers as the “2019 PO Market Star Performers” – Accenture, Genpact, GEP, and WNS

16 Service Provider Profiles

Each service provider profile provides the following PO-specific details:

- **PO service suite and scale of operations:** Includes key leaders, service suite, FTEs, and recent developments
- **PO client portfolio:** Includes major clients and recently announced contracts, revenue split by geography, industry, and buyer size
- **Global PO delivery locations:** Includes detail of key PO delivery locations across the world
- **PO technology solutions:** Includes prevalence of different technology approaches and the profiles of key technology solutions
- **Detailed assessment of PO capabilities:** Includes market impact and vision and capability assessment as well as remarks on service provider’s key strengths and areas of improvement

This study offers two distinct chapters providing a deep dive into key aspects of PO market; below are four charts to illustrate the depth of the report

Capabilities

Key PO leaders

- Name, designation
- Name, designation
- Name, designation
- Name, designation
- Name, designation

PO service suite

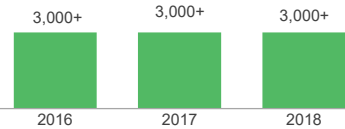
- **Strategic sourcing and category management related:** Spend analysis, opportunity assessment, strategic sourcing, contract management, and compliance management
- **Procurement operations:** Tail-spend management, catalog management, accounts payable, and contract administration
- **Procurement software:** AI-based S2P platform and software covering spend analysis, sourcing, contract management, supplier management, and P2P

Category expertise

- **Direct:** Chemicals, metals, ingredients, energy, packaging, electronics, and finished goods
- **Indirect:** General, administrative, professional services, logistics & freight, IT & telecom, research & development, marketing, and packaging

Scale of operations

Number of PO FTEs¹ over time



FTE mix by process scope



Key PO-related developments

- **2018:** Acquired a US-based technology enabler to strengthen its analytics and cognitive capabilities
- **2018:** Expanded presence in APAC by opening new offices in Gurgaon, India and Dalian, China

Client portfolio

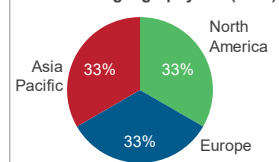
Major PO clients

A US-based CPG company, a global hi-tech & telecom company, and a Fortune 100 bank

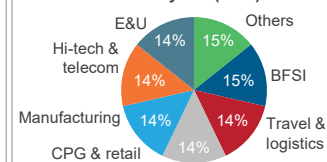
Recently-announced multi-process PO engagements

Time of signing	Client	Contract details
April 2018	A UK-based manufacturing company	A five year contract with req to PO and order management services
May 2018	A Europe-based global online payments system provider	A five year contract with end-to-end S2P focus
July 2018	A US-based bank	A 2 year contract with account payable and strategic sourcing

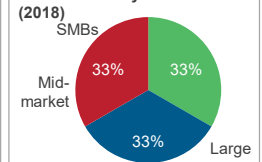
PO revenue geography mix (2018)



PO revenue industry mix (2018)



PO revenue buyer size mix (2018)



Key delivery locations



Technology solutions

	Solution 1	Solution 2	Solution 3
Solution description	• Offered as a complete end-to-end managed service for S2P	• Offered as a complete end-to-end managed service for S2P	• Offered as a complete end-to-end managed service for S2P
Process scope	<ul style="list-style-type: none"> • S2P processes including: <ul style="list-style-type: none"> – Strategic sourcing, category management, and spend analytics – Tactical buying / RFX management, catalog management, contract management, and operations – Order execution and management 	<ul style="list-style-type: none"> • S2P processes including: <ul style="list-style-type: none"> – Customer assistance center for query handling – Tail-end spend management – T&E management 	<ul style="list-style-type: none"> • S2P processes including: <ul style="list-style-type: none"> – Tail-end spend management – T&E management – Accounts payable and audit recovery
Technology leveraged	• Leveraging ERPs including SAP Ariba, SAP, PeopleSoft, Oracle, and JD Edwards	• Leveraging ERPs including SAP Ariba, SAP, PeopleSoft, Oracle, and JD Edwards	• Leveraging ERPs including SAP Ariba, SAP, PeopleSoft, Oracle, and JD Edwards
Delivery model and pricing	• Hosted BPaaS, single-client, and multi-client – as-a-service platform with intelligent automation and digital workers	• Delivery model includes global support through onshore, nearshore, and offshore CoE based on client needs	• Hosted BPaaS, single-client, and multi-client – as-a-service platform with intelligent automation and digital workers

Research calendar – Procurement Outsourcing (PO)

Published
 Planned
 Current release

Flagship PO reports

Release date

Procurement Outsourcing (PO) BPO – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018	March 2018
Supply Chain Management (SCM) BPO – Annual Report 2018: Moving Toward a Digital Supply Chain Ecosystem	July 2018
Procurement Outsourcing (PO) Annual Report 2018: Driving Strategic Value from Procurement	September 2018
Procurement Outsourcing (PO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019	April 2019
Procurement Outsourcing (PO) Annual Report 2019: Evolving Imperatives for Procurement and What a Chief Procurement Officer (CPO) Should do to Remain Relevant	July 2019
Procurement Outsourcing (PO) Service Provider Compendium 2019	July 2019
SCM Service Provider Landscape with PEAK Matrix Assessment 2019	Q4 2019

Thematic PO reports

Understanding Strategic Sourcing and its David and Goliath Landscape	November 2018
Is It Time to Outsource Direct Spend Categories?	February 2019
Journey Toward Integrated Supply Chain Management	June 2019
Procurement Outsourcing (PO) Buyer Report 2019	July 2019
Looking Beyond Order Management – the Emergence of Perfect Order	Q3 2019
CPO vs CFO – Expectations vs Reality	Q3 2019
SCM Blockchain Trailblazers	Q3 2019

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

Additional PO research references

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

- 1. Procurement Outsourcing (PO) Annual Report 2019 – Evolving Imperatives for Procurement and What a Chief Procurement Officer (CPO) Should do to Remain Relevant** ([EGR-2019-22-R-3245](#)); 2019. This report will assist key stakeholders (buyers, service providers, and technology providers) understand the changing dynamics of the PO market and help them identify the trends and outlook for 2018-2020. In this backdrop, the report covers the global PO market comprehensively including a detailed analysis of market size & growth, buyer adoption trends, key emerging themes, and service provider landscape.
- 2. Procurement Outsourcing (PO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019** ([EGR-2019-22-R-3143](#)); 2019. This report examines the dynamics of the global PO service provider landscape and its impact on the PO market. Based on the comprehensive Everest Group PEAK Matrix, each of the 16 PO service providers are segmented into Leaders, Major Contenders, and Aspirants. The report also provides key insights into service provider position & growth in the market, changing market dynamics, and assessment of service provider delivery capabilities. It will assist key stakeholders (service providers, buyers, and technology providers) understand the current state of the PO service provider landscape.
- 3. Procurement Outsourcing (PO) Annual Report 2018: Driving Strategic Value from Procurement** ([EGR-2018-22-R-2778](#)); 2018. This report will assist key stakeholders (buyers, service providers, and technology providers) in understanding the changing dynamics of the PO market and help them identify the trends and outlook for 2018-2020. In this backdrop, the report provides comprehensive coverage of the global PO market including detailed analysis of market size & growth, buyer adoption trends, key emerging themes, solution characteristics, and service provider landscape.

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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.

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