



# **Managed Service Provider (MSP) – Service Provider Compendium 2019**

Managed Service Provider

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

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## Membership information

- This report is included in the following research program(s)
  - [Managed Service Provider \(MSP\)](#)
- 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), [unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com), or [india@everestgrp.com](mailto:india@everestgrp.com)

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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

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

- Everest Group's proprietary database of over **1300 MSP 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 21 MSP service providers** (updated annually)
- The database tracks the following capability elements for each service provider:
  - MSP clients, revenue, service suite, and employees
  - Recent MSP-related developments (investments and partnerships)
  - MSP clients split by geography, industry, scope, and buyer size
  - MSP spend split by geography, source of hires, and type of sourcing model
  - MSP delivery locations and level of offshoring
  - MSP supplier partners by geography

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

## The analyses in this report are 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 deal detail availability

## Service providers covered in detail in the analyses



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

# The MSP Service Provider Profile Compendium 2019 report has over 20 service provider profiles

## Service Provider | MSP profile (page 1 of 4)

### Service capability and strategy

#### Company profile

Service provider is a leading talent solutions provider. It provides XYZ to customers seeking to improve the efficiency and effectiveness of their workforce programs.

**Headquarter:** Location, the United States of America  
**Leadership:** Name  
**Website:** Companywebsite

#### MSP experience

- Total managed spend: US\$
- Total number of current MSP clients: Numbers

#### Tools and technology

Tools	Proprietary/partnership
Vendor Management System (VMS)	Partnership: Partnership 1, Partnership 2
Services procurement (SOW)-related tools	Proprietary: Proprietary 1, Proprietary 2 Partnership: Partnership 1, Partnership 2
Freelancer Management System (FMS)	Proprietary: Proprietary 1, Proprietary 2 Partnership: Partnership 1, Partnership 2
Analytics	Proprietary: Proprietary 1, Proprietary 2 Partnership: Partnership 1, Partnership 2

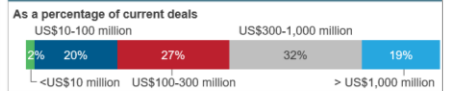
#### Contingent workforce spend split by type of workers managed



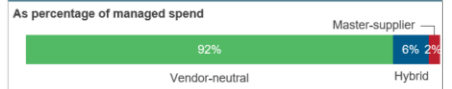
#### Contingent workforce – Geography focus



#### Deal size (based on spend managed)



#### MSP engagement model<sup>1</sup>



<sup>1</sup> MSP engagement model (based on percentage of requisitions filled by MSP (or subsidiary / sister company): Vendor-neutral (0-10% requisitions), hybrid (10-50% requisitions), and master supplier (greater than 50% requisitions)

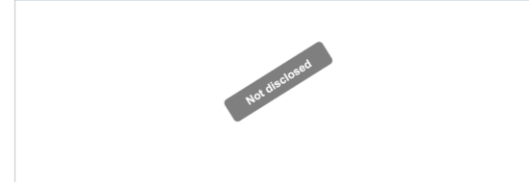


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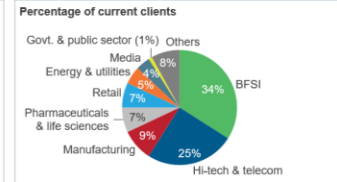
## Service Provider | MSP profile (page 2 of 4)

### Portfolio

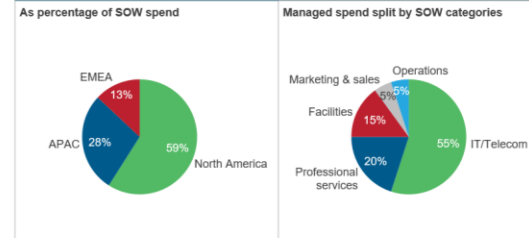
#### Major MSP clients



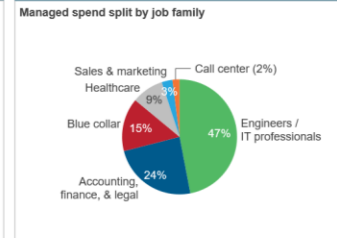
#### Buyer industry



#### Focus on services procurement



#### Nature of workforce managed



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# Research calendar – Managed Service Provider (MSP)

■ Published   ■ Planned   □ Current release

## Flagship MSP reports

### Release date

Managed Service Provider (MSP) Service Provider Landscape with PEAK™ Matrix Assessment 2017- Asia Pacific .....	December 2017
Managed Service Provider (MSP) Service Provider Landscape with PEAK™ Matrix Assessment 2018 .....	September 2018
Managed Service Provider (MSP) Annual Report 2019 – Navigating through uncharted territories: Is the industry compass ready? .....	December 2018
Managed Service Provider (MSP) Service Provider Landscape with PEAK™ Matrix Assessment 2019 .....	June 2019
<b>Managed Service Provider (MSP) – Service Provider Profile Compendium 2019 .....</b>	<b>August 2019</b>
Managed Service Provider (MSP) Annual Report .....	Q3 2019
Services Procurement (SOW) Service Provider landscape with PEAK™ Matrix Assessment 2019 including market trends .....	Q4 2019

## Thematic MSP reports

Digital Technologies: The Next Frontier in Talent Acquisition .....	December 2017
Reimagining Talent Acquisition in a Digital – First Era .....	March 2018
MSP: A peek into Buyers' mind – Digital and Futuristic Outlook is the Key to Buyers' Delight .....	August 2018
Digital startups in Talent Acquisition (Part 3 of 3) .....	October 2018
Managed Service Provider : A Peek Into the Buyers' Mind .....	March 2019
Clash of MSP and PO Markets .....	March 2019
Insights – Best in Class MSP Programs .....	Q3 2019

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

# Additional MSP research references

The following documents are recommended for additional insight on 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. Managed Service Provider (MSP) – Service Provider Landscape with PEAK Matrix™ Assessment 2019** ([EGR-2019-25-R-3207](#)); The global Managed Service Provider (MSP) market is undergoing tremendous change owing to buyer requirements for more strategic solutions. In order to service these additional requirements of buyers, service providers are continuously investing to expand their capabilities in these new areas. They are gradually increasing their technology leverage in analytics, SOW management, and IC management areas to optimize the contingent workforce programs
- 2. Managed Service Provider (MSP) Annual Report 2019 – Navigating Through Uncharted Territories: Is the Industry Compass-Ready?** ([EGR-2018-25-R-2894](#)); The global Managed Service Provider (MSP) market is growing steadily on the back of rising demand for contingent workforce across geographies and industries. It is expected to witness a growth rate of 10-12% in 2018, backed by ever-increasing demand for temporary workers, rise in adoption of services procurement, and the emergence of the gig economy, resulting in rapidly-increasing numbers of freelancers/ICs
- 3. Managed Service Provider (MSP) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018** ([EGR-2018-25-R-2775](#)); The global Managed Service Provider (MSP) market is undergoing tremendous change owing to buyer requirements for more strategic solutions. In addition to the traditional temporary labor, buyers are increasingly relying on their service providers to manage additional types of labor including services procurement/SOW, independent contractor (IC), and permanent labor.
- 4. Managed Service Provider (MSP) Annual Report 2018 – Towards the Next Frontier – Boldly Going Where Few Have Gone Before** ([EGR-2017-3-R-2471](#)); The global Managed Service Provider (MSP) market continued to remain one of the fastest-growing single-process HRO markets. It is expected to pose a high growth rate of 9-11% in 2017, backed by ever-increasing demand for contingent workers, rise in adoption of Statement of Work (SOW), and the emergence of the gig economy, resulting in rapidly-increasing numbers of freelancers/ICs.

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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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