



# Targeting Multi-Process HR Outsourcing

Market Analysis  
Report Abstract

February 2013

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111 pages

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## Who Is This Report For?

“Targeting Multi-Process HR Outsourcing” (MPHRO) is a comprehensive market analysis report designed for:

- Sourcing managers monitoring the capabilities and other members of procurement involved in the evaluation of MPHRO
- Vendor marketing, sales, and business managers developing strategies to target service opportunities within the MPHRO market
- Financial analysts and investors specializing in the MPHRO sector

## Scope of the Report

The report analyzes the global market for MPHRO services and addresses the following questions:

- What is the current and future market for MPHRO?
- What is the size and growth of the MPHRO market by geography and market segment?
- Within MPHRO, which industries are emerging strongly?
- What are the customer requirements for MPHRO including drivers, benefits, and inhibitors?
- What technologies and platforms are being utilized and what are the key developments?
- What are vendor challenges and critical success factors?
- How are vendors positioned within each MPHRO market segment and geography?
- Additional topics include: contract lengths; pricing models; partnerships; acquisitions; delivery capabilities; vendor targeting by client size and geography.



## Key Findings & Highlights

The MPHRO market accounts for 6% of the global HRO market size, and has a healthy CAAGR through 2016. This report highlights current market sizing and growth estimates for each market segment within MPHRO including:

- Multi-Country Standardization
- Client-Specific Shared Service Transformation
- Core Business Focus
- Technology-Led HR Service Enhancement.

While the Client-Specific Shared Service Transformation segment is the largest, the Multi-Country Standardization and Core Business Focus segments are growing the fastest. By geography, the U.S. is the largest MPHRO market in terms of revenue, but Latin America has the highest CAAGR.

Drivers for MPHRO vary by market segment. For example, growth for the Multi-Country Standardization segment is the result of large organizations needing to streamline operations with consistent processes and information across geographic boundaries, whereas growth for the Core Business Focus segment is the result of organizations focusing on their core competency to support growth.

Like the drivers, the challenges and success factors differ by segment. However, the most important success factor across all market segments is the ability to rollout standardized HR administration and payroll. This success factor is critical since the core MPHRO bundle purchased by majority of clients is HR administration, payroll, and employee care. Benefits administration and recruitment are the most popular add-on services.

The report also explores platform strategies by vendor and the prevalence of mobile applications. While there tends to be a general consensus among vendors on areas to focus for developing the MPHRO offering (e.g., enhancing core capabilities including multi-country payroll and recruitment) and on delivery strategies (e.g., offering onshore support out of the U.S.), there is a non-converging set of technology strategies that include the following among others:

- A focus on implementing the Workday platform
- Consolidating proprietary platforms
- Enhancing existing proprietary technologies.

In terms of vendor targeting, the report analyzes a variety of perspectives including:

- Multi-tower BPO contracts including MPHRO
- Market segmentation
- Mid versus large market
- Geographic regions
- Industries.

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## Vendors Researched

Accenture, ADP, Aon Hewitt, Caliber Point, Capgemini, Capita, Ceridian, CGI (formerly Logica), Genpact, HCL, HP, IBM, Infosys, Neeyamo, NorthgateArinso, Talent2, TCS, Wipro, Xchanging, and Xerox

## Report Length

111 pages, consisting of 9 chapters and 29 data charts

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