

What is global services?

Global services is the intersection and management of four areas

1

Solution model

- Output required
- Process model (e.g., activities, functional, end-to-end)
- Role of people (e.g., self-service, judgment)
- Degree of customization



2

Technology model

- Role of technology in delivering the solution and level of customization
- Level and type of automation to offset talent requirements
- Type of technology (e.g., COTS, proprietary, add-ons)

Global
services

Talent & location model

- Required skills
- Supply and demand of skills (volumes, languages, etc.)
- Role of geographies in delivery (hubs, spokes, etc.)
- Distribution of resources across locations



Sourcing model

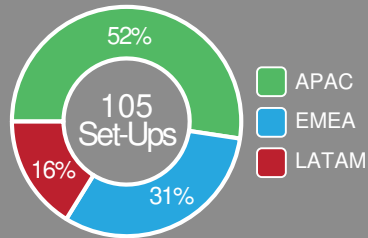
- Relative roles of internal and external models (segmented, hybrid, etc.)
- Type of internal (e.g., shared services, COEs, business)
- Type of external (e.g., outsourcing, MSP, contractors)

3

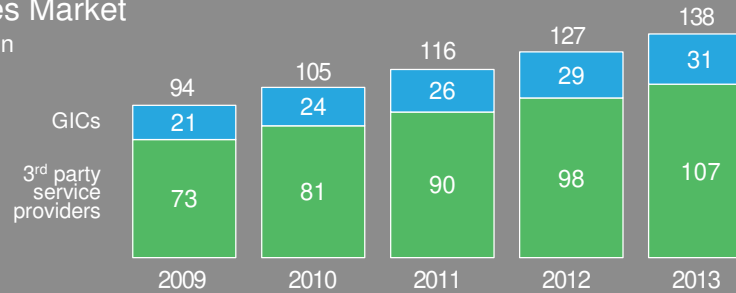
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Global Services Fact Sheet

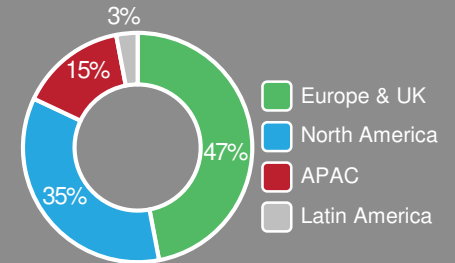
Offshore Delivery Center Set-Up Locations, 2013



Global Offshore Services Market \$US billion



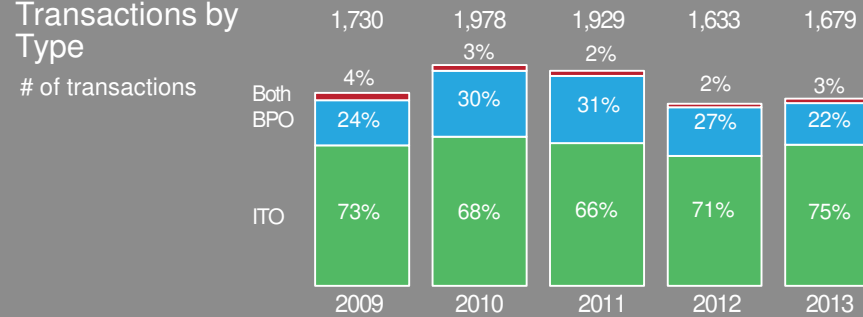
Distribution of Cloud Deals, 2013 # of deals



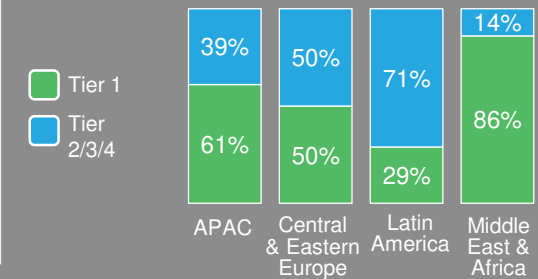
GIC Activity Trends



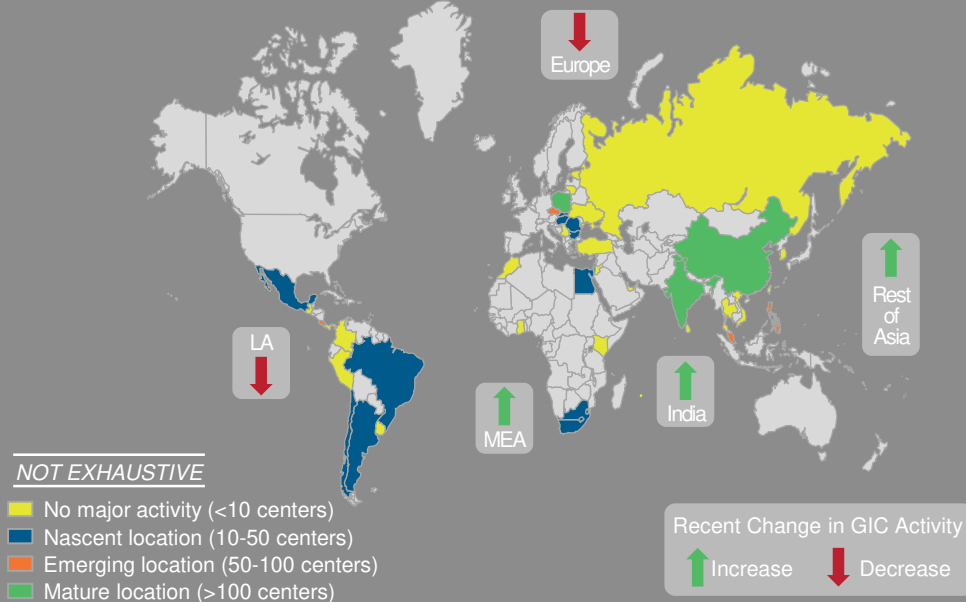
Outsourcing Transactions by Type # of transactions



Offshore Delivery Center Set-Ups Tier 1 v Tier 2/3 City, 2013

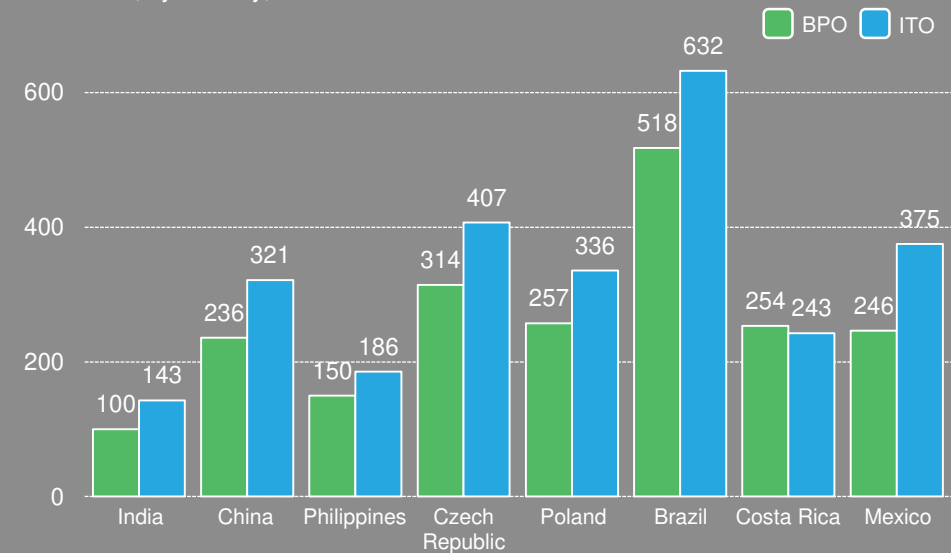


GIC Market Activity Heatmap

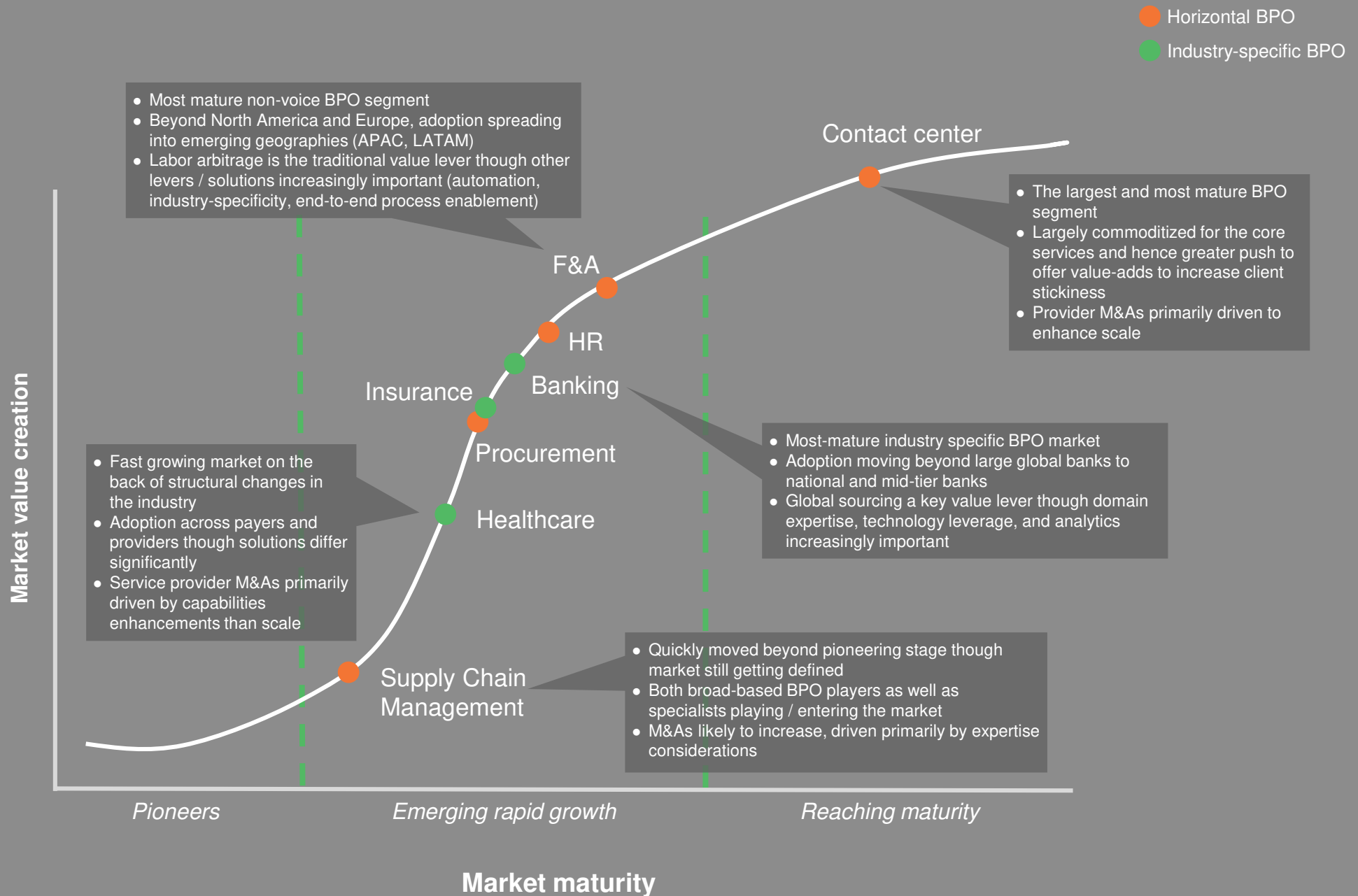


Indexed Annual Operating Cost Per FTE

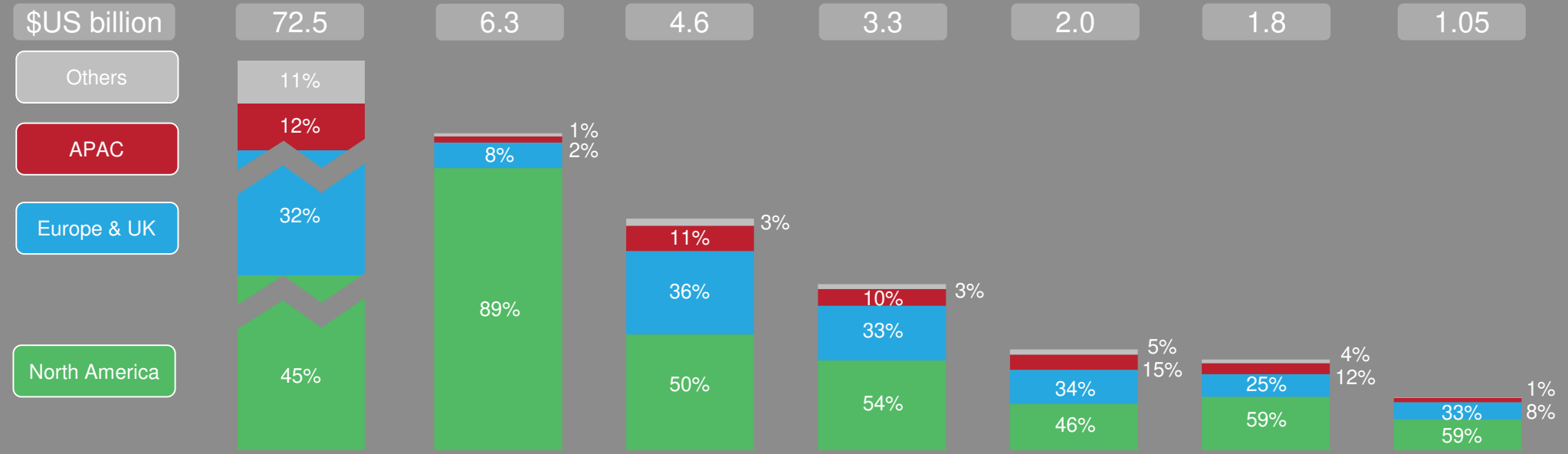
Tier-1 Cities, by Country, Indexed to India BPO=100



BPO Market Maturity S-curve

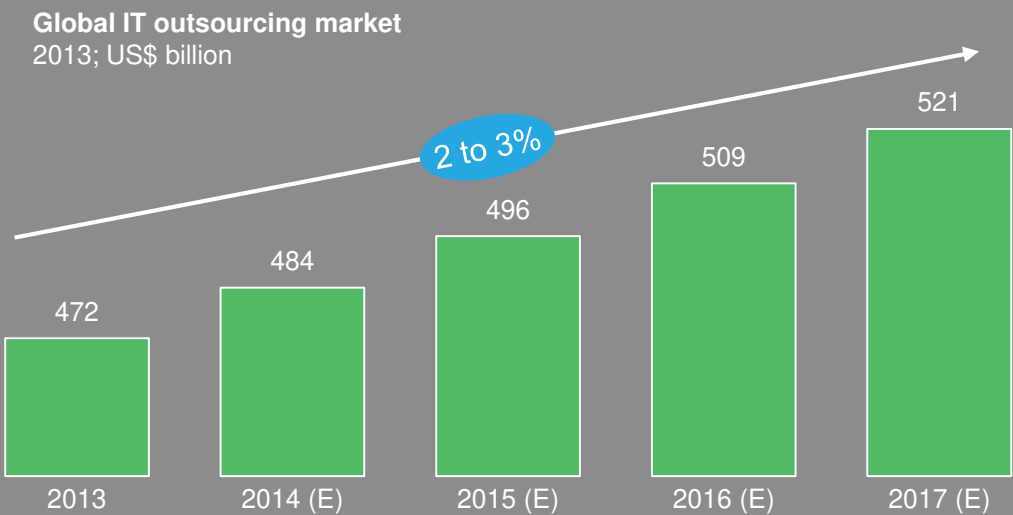


Horizontal BPO Key Market Characteristics

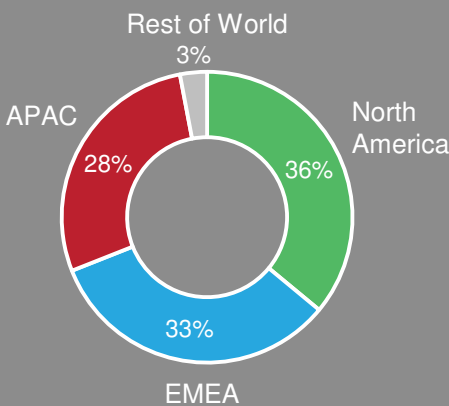


	CCO Contact Center	BAO Benefits Administration	MPFAO Multi-Process Finance & Accounting	MPHRO Multi-Process Human Resources	PO Procurement	RPO Recruitment Process	MSP Managed Services
Annual growth rate	7-8%	6-7%	8-9%	2-5%	9-12%	15-20%	13-16%
# Providers Tracked	23	10	23	21	20	25	13
Everest Group PEAK TM MARKET LEADERS	Serco Sitel Teleperformance Xerox	AonHewitt Fidelity Towers Watson	Accenture Capgemini Genpact IBM Infosys TCS	Accenture ADP Aon Hewitt IBM NGA Human Resources	Accenture- Procurian GEP IBM Infosys Xchanging	Alexander Mann Solutions Kenexa ManpowerGroup, Pinstripe Pontoon Solutions Randstad Sourceright The RightThing	Allegis Global Solutions KellyOCG Randstad Sourceright TAPFIN, ManpowerGroup Solution
Market Characteristics	Buyer maturation drives service evolution and doubling of deal sizes	US healthcare reform spurs steady growth; private health exchanges are expected to have impact going forward	Advances in FAO solutions empower buyers to switch providers in search of more value, improved customer experiences, and transformation	Slow growth, but significant change as APAC becomes the market's activity hub	Growth is the theme: deal number and scope, geographic footprint, FTE count – all on the rise	Evolution is the catchphrase in RPO as geographic mix shifts and an RPO+ value proposition comes to the fore	Elementary changes are altering the dynamics of the MSP market as buyer profiles and demands change, and the service provider landscape morphs

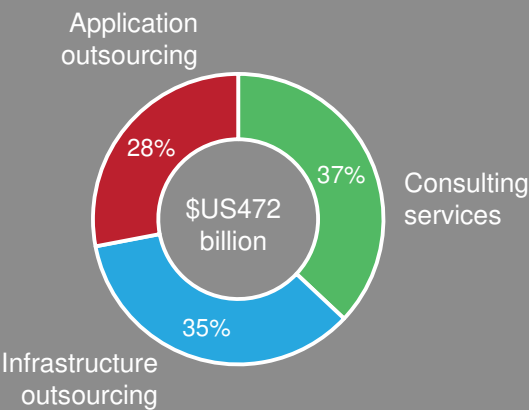
ITO Key Market Characteristics



Global IT outsourcing market by geography
2013; US\$ billion

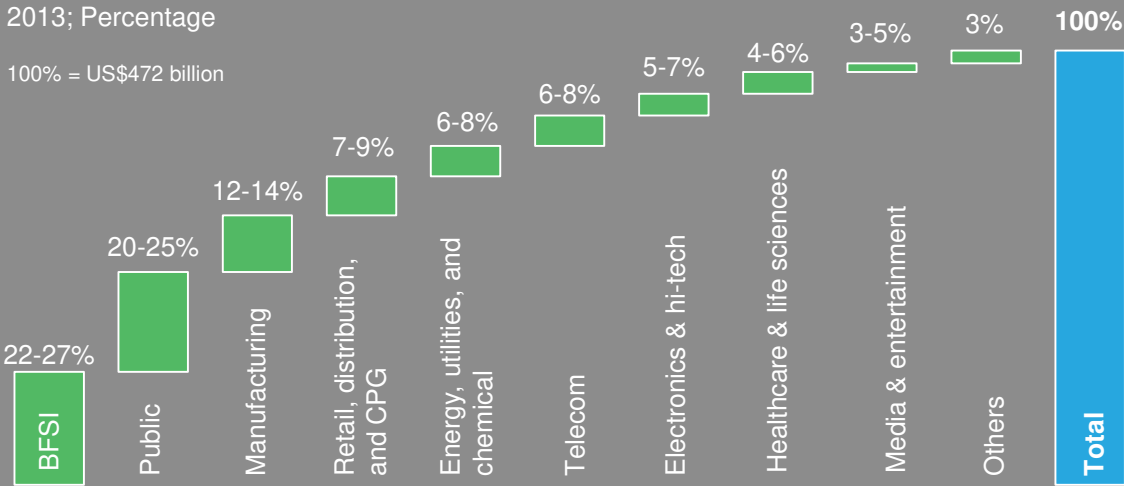


Global IT outsourcing market by service type
2013; US\$ billion



Global IT outsourcing market size by industry vertical
2013; Percentage

100% = US\$472 billion



ITO Key Market Characteristics

