ISG Provider Lens™

Procurement BPO and Transformation Services

Procurement BPO Services

Global 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

March 2021

Customized report courtesy of:

Infosys®

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of <February 2021>, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

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EXECUTIVE SUMMARY

BPO and Transformation Services 2021

This IPL report has been developed to provide research-based, objective insights into business process outsourcing (BPO) and transformation service providers for enterprise procurement leaders and users.

In the rapidly evolving “age of digital transformation,” procurement encompasses four related areas in enterprises: First, it helps drive innovation within an enterprise and accelerate business improvement; second, it expands the scope, influence and value of procurement across complex categories of direct and indirect spending; third, it focuses on enterprise success as the key measure of successful deployment; and four, it enables business agility within an enterprise through rapid enablement of digital innovations.

An enterprise procurement’s typical, core responsibility is to enable and manage the procurement of necessary goods and services in the most efficient, cost-effective and risk-averse manner sustainable. This enables not only ongoing cost savings, risk avoidance, and business continuity but also enables competitive advantages. Leading providers work with enterprise clients to unlock this advantage with the following: first, enabling cost reductions in external spend and internal operational efficiencies (often substantially adding to a client’s bottom line); second, enabling, developing, and building critical and sustainable supplier relationships that drive further savings and help reduce the risk of business disruption; and third, enabling and sustaining improvements in operational efficiency.

The challenge of procurement is that the more strategic it becomes to an enterprise, the more complex it must become; correspondingly, the more procurement needs to be transformed into both an efficient and streamlined function and an adaptable, agile business organization. The current uncertain business environment in many markets, and accelerating, aggressive investment by many competitors further complicate matters, pushing enterprises toward BPO providers rather than encouraging them to adapt what they have or build new environments on their own. We see an acceleration in demand for procurement BPO and also a rapid rise in demand for procurement transformation services.

The global spread of COVID-19 further accelerated interest in, and growth of, procurement transformation services. As COVID-19 spread, supply chains broke and cashflow was disrupted or even came to a halt. Access to resources became limited and unpredictable. At the same time, incompatibilities within and between systems, operations and organizations were made painfully visible. Procurement BPO goals of efficiency, cost reduction and risk aversion became even more challenging to enable, let alone achieve. Transformation of procurement functions, operations and systems is the means through which an increasing number of enterprises are successfully correcting problems surfacing or made worse by COVID-19. When executed effectively, such transformation also enables improved future agility and adaptability that can support and protect enterprises through future market disruptions.

The good news for enterprise procurement leaders is that most providers of BPO services also provide procurement transformation. Unfortunately, not all providers focus on the same aspects in both service types. This first-ever IPL Procurement Services study is to assist clients in assessing providers and their services (BPO and transformation) versus their own needs. ISG's companion Provider Lens™ study on procurement software platforms and tools provides an equally objective assessment of relevant platforms used by enterprises and services providers to help establish and expand a solid software foundation for procurement transformation, agility and maturity.

BPO Trends

Successful procurement BPO is built on a solid operational foundation, which, in turn, requires provider excellence in several fundamental areas that include the following:

- **Transformational frameworks and operational automation:** Leading providers utilize adaptable, repeatable frameworks that enable significant automation within and between operations. This enables significant and ongoing cost reduction with critical uniformity — something that, in turn, reduces training needs, support costs and the costs of integration and management.
- **Relevant software engineering and development resources:** Top providers invest heavily, and effectively, in software development; leaders stay ahead of current and emerging software developments. These robotic process automation (RPA), artificial intelligence (AI) and machine learning (ML) tools drive procurement goals and objectives, as well as underlying application programming interfaces (APIs), coding methodologies, and libraries and languages to enable the most effective offerings.
- **Delivery center strengths:** Having a large number of delivery centers is helpful. But the capabilities of providers' delivery centers relative to customer and provider partner needs are more important and should answer the following relevant questions: Can they serve selected geographical and vertical markets effectively? Do they interact seamlessly with each other and with customer systems and organizations? Do they enable significant and sudden scaling up or down of customer requirements?
- **Category expertise:** Category management expertise is becoming increasingly critical as products and services (including digital) rapidly evolve, and as sources, suppliers and prices vary, depending on supply chain factors impacted by COVID-19. Category management requires a thorough understanding of the nuances of products and services being sourced and paid for, including the factors that drive usage, cost and availability. Good category management enables significant business advantage for most firms, especially as procurement organizations "scale up" to effectively manage more indirect and direct complex categories
- **Industry vertical expertise and experience:** The ability to serve customer needs specific to selected industries has gone from being a differentiator to being a core,

expected capability for most providers. As customers learn and improve their own business models within the verticals in which they participate, they expect and need procurement services and providers to know and deliver what is needed and will be needed.

- **Procurement outsourcing transition expertise:** Transitioning customers from in-house to outsourced procurement systems, operations and even management requires substantial provider expertise, frameworks and resources. Leading providers have developed and refined not only transition services, but also optimized communication, training and change management for customers.

Transformational Trends

Procurement BPO providers that excel in transition and change management for customers tend to be among the leaders in our transformation services quadrant as well. Transformation includes a number of operational, organizational and technological transitions, many of which customers have not experienced, at least on the scale associated with core procurement transformation.

To minimize, prevent, and overcome resistance to change, providers of procurement transformation services must create and deliver a significantly improved (and hopefully, advanced) degree of business improvement with obvious enablement of future business capability and improvement. Accomplishing this, especially during global business disruption, requires not only the capabilities of the above BPO service providers, but also the following:

- **Emphasis on unification:** One goal of transformation should be to enable uniformity of experience, technologies, operations and outputs across all aspects of procurement (and increasingly across procurement , finance, change management and HR). This requires unification of organizations and systems that, in many cases, developed and grew in technology and functional silos. Not every system or user has to use all technologies in the same ways. But systems, results, user experiences and interfaces (at least) need to be able to work together throughout procurement in cost-effective, easily understandable and replicable manners. This requires unification of responsibility, strategy and expectations, in addition to unification of technologies and services.
- **Integrative approaches:** The above unification helps to consolidate, coordinate and reduce complexity in many areas of procurement. But providers' approaches must also be integrative in nature. Aligning and intertwining relevant processes, stakeholders and systems to deliver specified, measurable improvements requires a combination of flexible, integrative approaches that also include change management and adaptive governance.
- **Capital-friendly pricing:** A critical goal in disruptive periods, such as the current COVID-19 crisis, is preserving working capital. The irony in needing to spend more to transform procurement so that we spend less in the future on procurement is not lost on leading providers of transformation services. Like their leading procurement platform and software counterparts, leading transformation service providers are moving toward outcome-based pricing and payment options, wherein the cost of services (and often, of related software) is offset by cost savings in procurement operations.

Depending upon circumstances, some providers will negotiate guaranteed cost savings through near and long-term procurement improvements.

- **Readable, scalable and reliable roadmaps:** It is not enough to change and improve procurement today. True transformation enables ongoing and adaptable change by provider and customer alike. To accomplish this, providers must have robust, yet flexible, strategic roadmaps along with their capabilities and offerings, and must make these visible and understandable to customers. Otherwise, change initiated by the provider can trigger significant uncertainty and disruption within a customer's own business, and between the customer and its own suppliers and trading partners. A true transformation partner should also allow a customer to scale dynamically, based on emerging business conditions such as managing additional or complex spending categories and different geographies, or responding to crises such as COVID-19.
- **Adaptable business and ecosystem models:** Business management software and services are increasingly less distinguishable from one another. Software and services are increasingly intertwined parts of a spectrum of offerings and adaptable to customer circumstances, depending on the type of business value required by each customer. To compete in such an environment, platform and services providers both partner and mimic each other. Procurement provider partner ecosystems show an increasing emphasis on co-selling, co-delivering, and co-managing, therefore, selecting, contracting with and managing providers becomes increasingly complex and challenging for enterprise customers. This requires effective transformation providers to adapt their own business and technological architectures and operational models.

Transformation as Future BPO

Most enterprises expect their transformations to be sustainable, and remain as future, standard operational models for procurement. But given that transformation, done correctly, is an ongoing endeavor, future BPO models must themselves enable and support a continuous state of transformation.

As noted previously, most of the providers in this study's BPO quadrant are also in this study's transformation quadrant. Differences in their positioning are based on differences in their relative market strengths and portfolios.

What leading providers in both quadrants have in common is a strategic mindset and roadmap that combines BPO with ongoing transformation. In order to become leaders in either quadrant, providers must be able to continually transition customers to emerging procurement environments. In effect, tomorrow's BPO emerges from today's transformation. Customers that understand and are able to position themselves to operate in, and take advantage of, such an environment will experience the strategic and tactical benefits of both.

Introduction

Simplified illustration

Source: ISG 2020

Definition

For several years, procurement functions have been transitioning from supply management and overseeing transactional activity to more holistic participation within the business. But as the business world transitions to post-COVID, organizational, labor and economic realities, procurement (as a function and as an organization) has been under increasing pressure to improve, and to do so at a rapid pace, while enabling transition to more integrative, digitally agile business environments.

An increasing number of enterprises are addressing this need through engagements with providers of procurement BPO and digital transformation services. Such an approach enables the optimization of enterprise procurement, and ideally to future-proof it, while minimizing direct enterprise investment in new software, infrastructure, tools and skills.

Definition (cont.)

This ISG Provider Lens™ study looks at services providers in two ways: provision of procurement BPO that enables more efficient and sustainable procurement functionality and operation; and provision of services that transform traditional procurement into a future-ready, digitally agile status that enables substantially improved value to an enterprise.

The ISG Provider Lens™ study offers business and IT-decision makers:

- A global view of leaders, Rising Stars and contenders in the procurement business process and digital transformation outsourcing;
- A differentiated positioning of providers by segments;
- Transparency on the strengths and weaknesses of relevant providers.

This study serves as an important decision-making basis for positioning, key relationships, and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Scope of the Study

As noted above, this report looks at the following two aspects of enterprise procurement services and providers:

Procurement BPO Services

The outsourcing of basic procurement operations, especially transactional procurement, has been established for many years. Recently, the growth in scope of global business and enterprise digital business transformation have driven rapid expansion of procurement BPO into more strategic areas such as supplier selection, contract negotiation, and specification management. This report assesses providers' relative ability to address the increasing range and complexity of procurement BPO.

Procurement Digital Transformation Services

As enterprises face global business disruption, the digital transformation of procurement as a group and as a series of operations are increasingly being examined as sources of significant cost savings and as enabling enterprise-wide operational improvement. This report assesses services providers' abilities to transform procurement operations and functionalities from tactical cost centers to strategic, value-added profit centers, including relevant combinations of transformation models, strategic expertise, technologies and tools, software and services knowledge, and more.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes, classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket**: Companies with 100 to 4,999 employees or revenues between US$20 million and US$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts**: Multinational companies with more than 5,000 employees or revenue above US$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

The Leaders among the vendors/ providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average cover¬age of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly fall behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders still lack mature products and services or sufficient depth and breadth in their offering, but also show some strengths and improvement potential in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Companies that receive the Rising Star award have a promising portfolio or the market experience to become a leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made significant progress toward their goals in the last 12 months and are expected to reach the Leader quadrant within the next 12-24 months due to their above-average impact and strength for innovation.

Not In

The service provider or vendor was not included in this quadrant. There might be one or several reasons why this designation is applied: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not qualify due to market share, revenue, delivery capacity, number of customers or other metrics of scale to be directly compared with other providers in the quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer this service or solution, or confer any other meaning.

Procurement BPO and Transformation Services - Quadrant Provider Listing 1 of 2

	Procurement BPO Services	Procurement Digital Transformation Services
Accenture	Leader	Leader
Aquanima	Contender	Not in
Capgemini	Leader	Product Challenger
Cognizant	Market Challenger	Market Challenger
Conduent	Contender	Contender
Corbus	Contender	Contender
Corcentric	Product Challenger	Product Challenger
DXC	Market Challenger	Market Challenger
EXL	Product Challenger	Contender
Genpact	Leader	Leader
GEP	Leader	Leader

Procurement BPO and Transformation Services - Quadrant Provider Listing 2 of 2

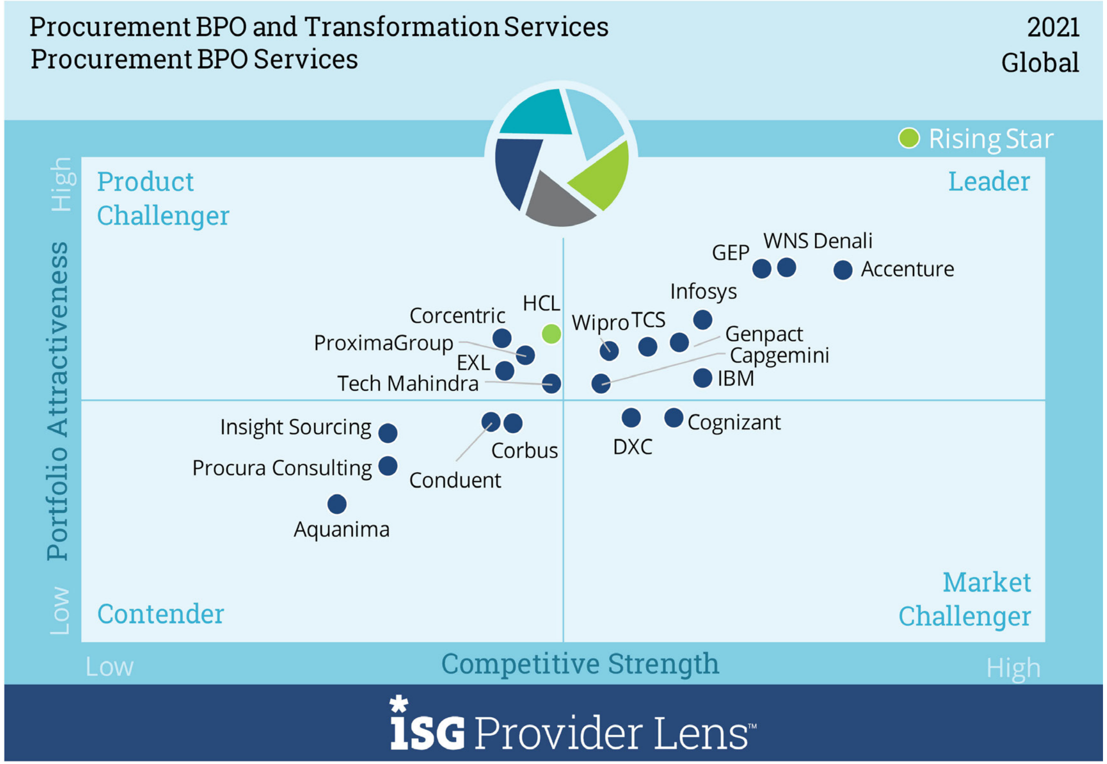
	Procurement BPO Services	Procurement Digital Transformation Services
HCL	Rising Star	Rising Star
IBM	Leader	Leader
Infosys	Leader	Leader
Insight Sourcing	Contender	Contender
Procura Consulting	Contender	Contender
ProximaGroup	Product Challenger	Product Challenger
TCS	Leader	Leader
Tech Mahindra	Product Challenger	Contender
Wipro	Leader	Leader
WNS Denali	Leader	Leader

Procurement BPO and Transformation Services Quadrants

PROCUREMENT BPO SERVICES

Definition

BPO has become widespread and continues to grow in use and in value. The outsourcing of transactional procurement has been a trend for years. But more recently, the outsourcing of strategic procurement activities such as supplier selection, contract negotiation or specification management has become common. Outsourcing procurement can help enterprises streamline operations and reduce costs, while allowing business transformation and rapid market adaptation that may not have been feasible when keeping procurement in-house.



Source: ISG Research 2021

PROCUREMENT BPO SERVICES

Eligibility Criteria

Eligibility and evaluation criteria used to assess these providers and their offerings include:

- Overall procurement strategy linked to corporate objectives;
- Chief procurement officer positioning and planning;
- Roadmap development and adaptation;
- Procurement strategy development;
- Procurement strategy execution;
- Strategic sourcing;
- Category management;
- Supplier management;
- Demand and specification management;
- Operational purchasing including bid/spot buy management;
- Catalog management;
- Procurement management scope;
- Technology and support capabilities and offerings;
- Help/buy desk capabilities and offerings;
- Procurement tools and technologies (analytics; requisition-to-purchase order (req-to-PO); sourcing; supplier relationship management; contract management; and intelligent automation such as RPA, cognitive tools and AI);
- Accounts payable processing support.

PROCUREMENT BPO SERVICES

Observations

Providers and platforms in this quadrant tend to be focused on the acceleration and expansion of the digital transformation of procurement through the following: unification within procurement functions, data, user experience (UX) with an expanding scope of related finance, supply chain management (SCM), and HR operations; and preservation and optimization of customers' use of working capital. The leaders have an excellent track record in accomplishing one or both together with demonstrating the ability to develop and deliver value to customers and partners. Our observations include the following:

- **Accenture** is strongly positioned on all fronts, including a network of 30-plus delivery centers across 120 countries, supported with RadixOne, its cloud-based project and process management platform and Alma, its digital agent for sourcing and procurement .
- **Capgemini's** ESOAR (Eliminate, Standardize, Optimize, Automate, Robotize) methodology is a distinctive approach to develop automation solutions and implement successful change across procurement and additional client business processes.
- **Genpact** has a dedicated center of excellence (CoE) for major source-to-pay (S2P) platform implementation services, including advisory, support and license management with category experts at both onshore and nearshore locations across the globe. It has partnerships with major leading platform vendors.
- **GEP's** unique GRID (Global Regional Integrated Delivery) operating model enables it to incorporate regional insight into its global procurement operations, giving its solutions teams a leg up in intensely competitive markets.
- **IBM** is well known for its ability to work with a broad and deep range of partners to develop customer value in procurement BPO.
- **Infosys** is one of the highest-rated providers in this study for its ability and track record in transitioning customers from traditional procurement operations into a BPO environment that enables further digital transformation.
- **TCS'** procurement BPO business is growing at a CAGR of more than 25 percent in all major markets (North America, Europe and Asia) and across significant verticals (for example, manufacturing, pharmaceuticals and healthcare).

PROCUREMENT BPO SERVICES

Observations (cont.)

- **Wipro** has a strong procurement platform partner network, including a strong global partnership with SAP Ariba, a dedicated Coupa center of excellence; a strategic partnership with Ivalua; and a substantial investment in Tradeshift.
- **WNS Denali's** procurement BPO services span the spectrum of procurement well into SCM with advanced analytics, market intelligence, deep category expertise and transformation capabilities.
- Rising Star **HCL's** sourcing and procurement CoE coordinates best practices, policies, procedures and employee learnings from all procurement engagements. The CoE reports training or upskilling more than 1,000 employees in the past 12 months.

INFOSYS

Overview

Infosys' sourcing and procurement outsourcing services are provided through its Infosys BPM (Business Process Management) subsidiary. The company's portfolio includes category management and consulting services, strategic sourcing, operational sourcing, and transactional and digital services. Infosys reports managing over US$151 billion of spending across more than 20 delivery centers, with more than 150 consultants managing its various offerings.

Strengths

Client-bespoke, outcome-centered delivery and solution approach: Infosys emphasizes on flexibility in BPO while targeting specific client needs. Its procurement services model includes its HIPUS joint venture with Hitachi, Panasonic, and Pasona. This approach enables a consortium-style, aggregated approach enabling end-to-end, efficient Procurement capabilities and operations.

Unified capabilities across consulting, operations and technology: Infosys offers a holistic blend of advisory, consulting and transformation services and technology solutions. In addition, Infosys' procurement center of excellence provides thought leadership, innovative approaches and best practices in end-to-end Procurement operations, along with global skills and talent development and knowledge sharing.

Range of solutions based on client needs: While Infosys is seeing considerable growth in the area of taking over client procurement operations and assisting them to "move up the value chain" in enterprise procurement across a full stack of sourcing and procurement services, including category strategy, strategic sourcing, sourcing support, and master data and catalog management . The firm also engages with clients seeking assistance and improvement in specific aspects of procurement and related operations, such as requisition-to-purchase order (req-to-PO) management.

Transitional strengths: Infosys is one of the highest-rated providers in this study for its ability and track record in transitioning customers from traditional procurement operations into a BPO environment optimized to enable greater digital transformation.

Caution

Infosys' procurement services has a considerable presence in manufacturing, consumer packaged goods, energy and telecom verticals; however, clients in healthcare, pharmaceuticals, and life sciences verticals may find greater market-relevant experience with other leaders.

While it does have partnerships in place with key solution providers, Infosys tends to prioritize its own capabilities and leverage partners less than most other leaders in this quadrant. This can limit customer choice in solutions/services, and narrow Infosys' perspective regarding market change and velocity. Infosys does work with clients and partners to expand its ecosystem as prompted.

2021 ISG Provider Lens™ Leader

Infosys provides a solidly supported set of procurement BPO services for rapidly changing client requirements in a continuously disrupted global business environment.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2021 – Procurement BPO and Transformation Services" analyzes relevant global software vendors/service providers. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Definition of Procurement BPO and Transformation Services market;
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases.
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable).
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Author and Editor

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Author, Global Lead Analyst & Distinguished Analyst, ISG Research

Bruce Guptill brings more than 30 years of technology business and markets experience and expertise to ISG clients. Since the 1980s, Bruce has worked with IT market pioneers and innovators in business planning, product and service development, market analysis, and go-to-market strategy in desktop business computing, mobile telephony, electronic commerce, cloud IT, and now, digital business disruption and market transformation.

Within ISG, Bruce has helped develop and lead enterprise research development and delivery, global ISG Research operations, and Research client support. His primary research and analysis for ISG clients has focused on IT services market development, disruption and change. He currently contributes to ISG's Provider Lens global research studies as a lead analyst.

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Venkatesh is a Research Specialist with ISG Research. He is responsible for assessing the industry and technology trends and developments across multiple industries and providing key insights for business decision makers in the enterprise clients and service provider ecosystems. He supports the Provider Lens project related to Procurement Platforms and service providers within the ISG Global Research team.

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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