

HR Outsourcing (HRO) Fact Sheet

Overview of Research Capabilities and Services



Our Analysts

Katrina Menzigan
 Vice President of Research
kmenzigan@everestgrp.com

Rajesh Ranjan
 Research Director
rranjan@everestgrp.com

Sudhanshu Saxena
 Research Analyst
ssaxena@everestgrp.com

Headquarters

13455 Noel Road, Suite 2100
 Dallas, TX 75240
 Tel: +1-214-451-3110
 Fax: +1-214-451-3001

Other Locations

Ground Floor, Tower A
 Unitech Business Park
 South City - I, Gurgaon
 New Delhi National Capital Region
 India - 122001
 Tel: +91-124-304-1000
 Fax: +91-124-304-1050

150 E. 52nd Street, 16th floor
 New York, NY 10022
 Tel: +1-646-805-4000
 Fax: +1-646-805-4001

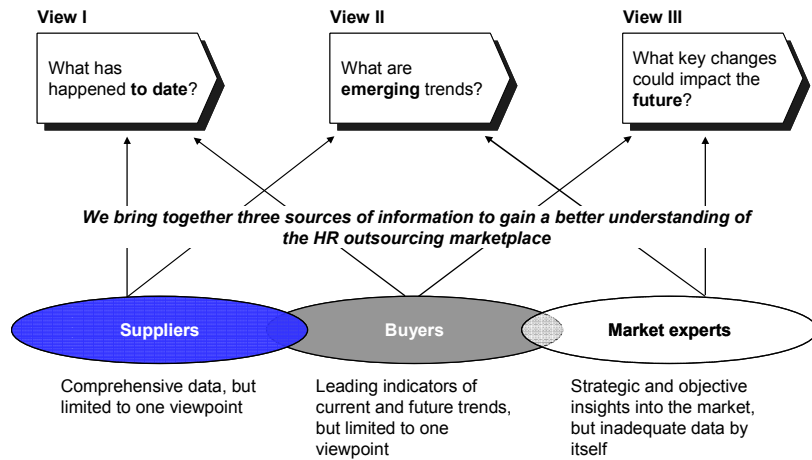
For More Information Contact:
 Research services
info@everestresearchinstitute.com
 +1-203-981-3111

Media inquiries
 North America and Europe
Scott Tims
stims@thepointgroup.com
 +1-214-378-7970

Asia
Puneet Khunger
puneet.khunger@edelman.com
 +91-11-2332-0116

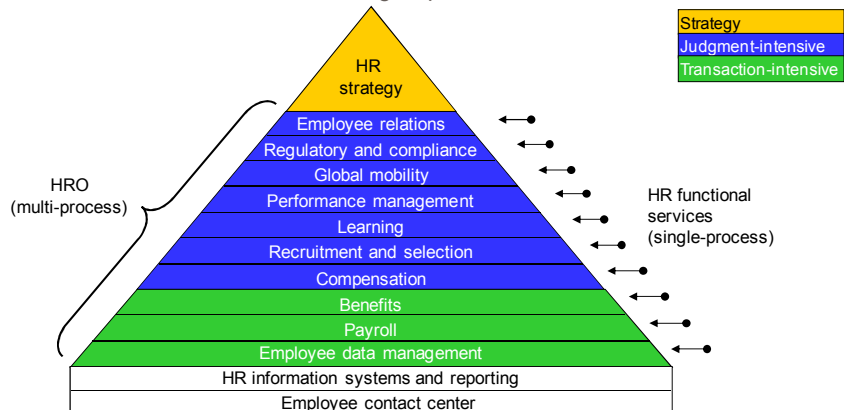
Overview

Everest Research Institute provides actionable insight and visionary research to buyers and suppliers of Human Resources Outsourcing (HRO). We analyze data and trends to understand the best delivery models, technology platforms and HRO solution bundles and make appropriate recommendations to our clients. Everest Research Institute conducts primary research to identify changing buyer requirements and new market opportunities. Our HRO research team combines deep subject matter expertise based on years of experience working in the HRO industry with broad analytical skills and insight into the HRO market to understand how emerging trends will impact our clients. Through syndicated and custom research, along with individualized attention to and contact with each of our clients, Everest Research Institute helps HRO buyers maximize their investment and attain their HRO goals and help suppliers to offer the best products for the market.



Focus of Research

Everest Research Institute focuses primarily on multi-process HRO defined as including three or more HR processes or functions (i.e., HR database administration, payroll, training, benefits administration, etc.) and covering 3,000 or more employees. We also research and analyze stand-alone HR process-specific outsourcing areas such as multi-country payroll outsourcing, learning services outsourcing, and recruitment process outsourcing among others. Our HRO framework creates a clear and consistent dialogue about how companies tend to outsource HR and their evolving requirements.



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Unique Aspects of Everest Research Institute

- Unparalleled focus on the HRO market – including supplier landscape, market size, and geographic and industry trends
- Most detailed and complete HRO deal database, with all multi-process HRO deals signed as of July 2008 (annually updated)
- Expertise in single process outsourcing such as multi-country payroll, learning, and recruitment
- Document formats designed to maximize reader usability of study findings
- Access to third party advisory insight on the “pulse” of the market

Suppliers Covered

- Accenture
- ACS
- ADP
- Capita
- Caliber Point
- Ceridian
- Convergys
- ExcellerateHRO
- Fidelity
- Hewitt
- IBM
- Infosys
- Logica
- NorthgateArinso
- Steria
- TCS
- Wipro
- Xchanging

We continuously monitor the market and update the above list with emerging suppliers in HRO. We also cover niche suppliers in select processes (e.g., multi-country payroll outsourcing, learning services outsourcing, recruitment process outsourcing)

Benefits of a Relationship with the Everest Research Institute

Everest Research Institute specializes in the outsourcing market. This includes understanding the business models available, the role of technology in outsourcing, impact on the buyer organization, and the benefits and risks of outsourcing. As an expert in the outsourcing field, only Everest Research Institute can offer a depth of insight and wealth of data on HRO. Access to our research and interaction with our thought leaders helps our clients to decide whether HR outsourcing is the right move for their organization, make better decisions about how to use HR outsourcing and which supplier to buy it from in order to deliver better HRO products and services.

Everest Research Institute offers a range of products and services geared to the needs of various constituencies in the HRO market including buyers, suppliers and investors. Services and products offered include:

- Syndicated research available to all subscribers, including market updates, annual reports and whitepapers
- Custom research projects based on the needs of clients that include
 - End of Term Support Services (ETSS)
 - Merger & Acquisition (M&A) support
 - Market entry and opportunity assessment
 - Competitive analysis
- Custom data cuts from existing research
- Access to the HRO analyst team
- Webinars on current HRO topics
- Strategy sessions focusing on the client’s goals and requirements
- Client event presentations

Our Research

Everest Research Institute focuses on a range of HRO topics of interest to buyers, suppliers and investors in the HRO market. Examples of topics that we have researched include:

- Multi-country payroll outsourcing (MCPO) - Supplier Profile Compendium, July 2009
- MCPO: A New Approach to an Old Problem, May 2009
- Global HRO Supplier Landscape - Supplier Profile Compendium, January 2009
- HRO Global Supplier Landscape, December 2008
- HRO Annual Report 2008, November 2008
- Learning Services Outsourcing - Accelerating the Learning Curve, September 2008
- Gathering Momentum: Mid-Market HRO, August 2008
- Pan-European HRO Market, May 2008
- Global Sourcing in HR, February 2008
- Benchmarking in HRO, June 2007

Our research agenda evolves as we incorporate insights on market trends, buyers’ requirements, and supplier capabilities. Planned research includes topics such as:

- End of Term Event in HRO
- Recruitment Process Outsourcing (RPO)
- HRO Annual Report, 2009-10
- HRO Global Supplier Landscape, 2009-10