

NASSCOM-Everest India BPO Study Roadmap 2012 - Capitalizing on the Expanding BPO Landscape

BRIEF OVERVIEW

This one-of-a-kind unprecedented, comprehensive report on India's BPO industry maps out Indian BPO industry's next wave of growth and paints a vision for the future. The study has been done from the point of buyers, third-party vendors, captives and policy makers. It attempts to serve as a comprehensive and authoritative reference point for all stakeholders. The 235-page study deep-dives into the true differentiating factors and also what needs to be done to sustain the long-term value proposition of the Indian BPO industry. Over 60% of the Indian BPO industry were physically interviewed during the course of this study, in addition to over 30 buyers who were interviewed to shape this mammoth study – making it the biggest survey of the Indian BPO industry to date. Insightful analysis is backed by supporting graphs and figures to derive knowledge-based, meaningful conclusions and reveal newly-emerging trends. Real issues and challenges as well as opportunities have been mapped and deliberated from multiple perspectives. Besides administering prescriptions for providers and buyers, the study also proposes recommendations for institutionalizing state-led/supported initiatives to propel growth.

The entire report is divided into 5 sections – Overview of the Indian BPO landscape; Opportunities; Evolving Buyer Expectations; Challenges and Issues; and Action Themes for the Future. It provides in-depth details on the Indian BPO industry from a wide-range of perspectives.

Highlights of Key Areas covered:

- Size and growth in the Indian BPO industry, including YoY growth over past 6 years
- Labor Arbitrage Comparison between global locations
- Percentage breakup of key offshore delivery centres across the globe, including India
- Maturity Index of Indian BPO industry, based on various parameters
- 4 dimensions of evolution of Indian BPO industry – What, Who, How and Where from
- In-depth analysis of horizontal service segments like Procurement, Knowledge Services, HRM, F&A, Customer Interaction and Support, etc.
- Deep-Dive on industry verticals - Banking & Capital Markets; Insurance; Technology; Telecom; Manufacturing; Travel; Retail; Media, Publishing & Entertainment; Energy & Utilities; Pharma & Life Sciences, etc.
- Multiple Trend Analyses – domain specialization across verticals; third-party vendors versus captives
- Key Markets for Indian BPO industry with respective shares
- YoY growth and CAGR of domestic outsourcing market over past 6 years
- Buyer and Revenue distribution by Forbes classification
- Emerging hybrid sourcing models
- Tools and techniques, standards and certifications being adopted by Indian players for better service delivery
- Data security and IP protection
- Building capabilities (maps key M&A between April 2005 and October 2007)
- Mapping presence and size of Indian BPO players in 75+ cities outside India
- BPO employment across tier 1, 1.5, 2 and 3 Indian cities, emerging trends
- Market opportunity for Indian BPO Industry over the next 5 years
- Verticals that will command the largest share in next 5 years
- Maturing buyer objectives and expectations and their impact on vendor selection criteria
- Are existing business models capable of delivering on these changing expectations
- Talent constraint – Will it impact the BPO boom? Which sectors will be hit the most? And how much?
- Emerging challenge from other locations – how governments are supporting their local BPO industries in various countries
- Impact of increasing salaries in BPO's – impact on India's cost arbitrage advantage
- Impact of Rupee appreciation
- Action themes that India and Indian BPO players should follow to maintain and accelerate growth trajectory
- India's untapped labor pool (state-wise)
- Proposed government incentives
- Potential emerging BPO hubs in India
- Emergence of Global Services Supply Chain
- How buyers can capture the India opportunity by reshaping their sourcing programs
- Recommendations - Collaborative Task Force and Self Regulatory Organizations