Everest Group Procurement Outsourcing (PO) Services PEAK Matrix® Assessment 2024

Focus on Accenture

October 2024

Introduction

While cost reduction still remains a top priority for procurement amidst macroeconomic uncertainty, geopolitical issues, and inflationary pressures, the vertical remains committed to enhancing digital maturity of its operations to drive savings and improve efficiency, transparency, stakeholder experience, and accountability. Procurement Outsourcing (PO) service providers continue to play an important role to support procurement organizations in their transformation initiatives by helping streamline processes, drive digital adoption, and incorporate best practices. Service providers are aligning their offerings to meet enterprise requirements to provide a comprehensive digital ecosystem comprising advanced technology solutions, such as end-to-end platforms, best-of-breed suites, and contextualized analytics and automation point solutions through their in-house investments and partnerships.

Service providers are incorporating AI (including generative AI) into their existing solutions and developing generative AI-based use cases to drive efficiencies, improve stakeholder collaboration and experience, and increase self-servicing across areas such as contract management, sourcing, and spend analytics service. With increased enterprise willingness to seek support in upstream procurement areas such as sourcing and category management, service providers are also enhancing the breadth

and depth of their sourcing and category expertise across indirect spend and specific direct-spend categories.

The PO provider landscape consists of a spectrum of providers including specialist providers, pure-play procurement and SCM-focused providers, broad-based BPS providers, and IT and BPS providers. In this research, we present an assessment of 24 PO service providers featured on the [Procurement Outsourcing (PO) Services PEAK Matrix® Assessment 2024](#).
We have also assessed 22 PO service providers on their Source-to-Contract (S2C) capability and featured them on the S2C Services PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for the calendar year 2024, interactions with leading procurement service providers, client reference checks, and ongoing analysis of the PO services market.

This research focuses on:

- PO services PEAK Matrix 2024
- S2C services PEAK Matrix 2024
- Service provider capability assessment
- Observations and comments on individual service providers
- Enterprise sourcing considerations

Scope of this report

Geography: global

Providers: 24 PO service providers

Services: Procurement Outsourcing (PO) and Source-to-Contract (S2C)

PO services PEAK Matrix® characteristics

Leaders

Accenture, Genpact, GEP, IBM, Infosys, and TCS

- Leaders have solidified their position in the PO market, even though growth momentum in 2023 has been slow compared to the previous year

- They have enhanced their end-to-end Source-to-Pay (S2P) capabilities through continued investments in their advisory capabilities, domain and category expertise, industry-specific solutions, advanced digital solutions including those leveraging generative AI, that enable them to drive large-scale, end-to-end transformation of procurement operations

- They are enhancing their unified umbrella offerings with a focus on intake and workflow management, in addition to integrating services and technology solutions (in-house and partnerships) as part of their platform solutions

- Leaders are increasingly developing capabilities to support organizations in areas such as tail-spend management, risk management, market intelligence, and direct spend management

- They also leverage their scale of operation and wide delivery presence to cater to the clients' varied strategic requirements

Major Contenders

Capgemini, Chain IQ, Cognizant, Conduent, Corbus, Corcentric, Exela Technologies, EXL, HCLTech, LogicSource, Tech Mahindra, Wipro, and WNS Procurement

- Major Contenders are investing in focused digital solutions and capabilities across S2P to plug existing gaps, which enables them to provide a wide range of procurement services across different geographies and industry segments

- Many of the Major Contenders are also investing to enhance their capabilities in areas such as ESG initiatives as well as risk management

- Many of these providers have developed modular solutions to address specific client requirements and provide high-level of flexibility in pricing and engagement models. Some of these are also developing advanced solutions leveraging AI / generative AI for specific procurement use cases

- Niche procurement providers are expanding their scale, delivery presence, and capabilities, to support clients on their P2P requirements in addition to S2C

Aspirants

Aquanima, Conduent, Datamatics, Dragon Sourcing, Nexdigm, and Velocity Procurement

- These are specialist providers focused on specific procurement and sourcing services, vertical(s), or buyers, and have a relatively small scale of procurement operations

- While they have developed some digital capabilities and offer innovative models of delivery, they have limited scale and digital maturity to cater to the requirements of large global buyers looking for end-to-end transformation

Everest Group PEAK Matrix®

Procurement Outsourcing (PO) Services PEAK Matrix® Assessment 2024 | Accenture is positioned as a Leader and Star Performer

Everest Group Procurement Outsourcing (PO) Services PEAK Matrix® Assessment 2024[1,2]

- ● Leaders
- ● Major Contenders
- ○ Aspirants
- ☆ Star Performers
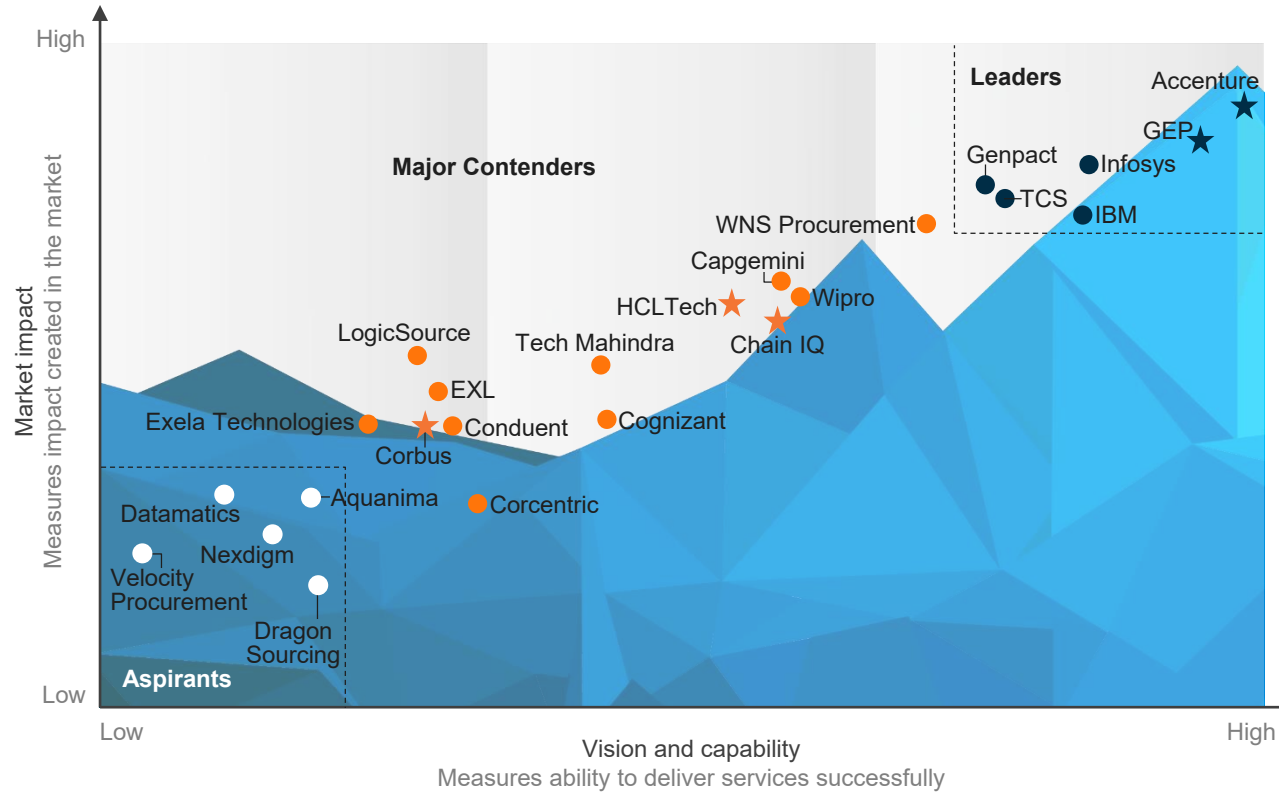
1 Assessments for Aquanima, Corcentric, Exela Technologies, EXL, and Velocity Procurement excludes service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with PO buyers
2 Assessments for Conduent and IBM is based on partial inputs provided
Source: Everest Group (2024)

Accenture profile (page 1 of 9)

Overview

Key leaders

- Kristin Ruehle, Accenture Procurement Business Process Services Offering Lead
- Bob Korbeck Jr., Chief Technology Officer, Procurement Business Process Services
- Keyra Morales, Senior Offering Development Innovation Executive, Procurement and Supply Chain

PO service suite

It includes sourcing and procurement capabilities that include operations / business process services, strategy and design, technology, sustainability, and transformational change management for all S2P processes, across direct and indirect spend categories.

- Source-to-Contract (S2C): it includes demand management, category strategy, strategic sourcing, sustainable sourcing, contract negotiation and life cycle management, supplier risk, supplier relationship management, performance management, analytics, closed-loop spend management, digital enablement, and continuous cost improvement

- Procure-to-Pay (P2P): it includes buying and supplier channel strategy; processing requisitions, POs, and invoices (including automation and exception management); PO follow-up activities; spot buy/tail-spend management; Master Data Management (MDM); e-catalog; helpdesk; buyer and supplier portals; enablement and guidance; payment strategy; T&E; and analytics

- S2P strategy: it includes closed-loop spend management strategies to achieve organizational objectives and contribute to the broader business, finance, and technology goals; services include the design of the operating model, zero-based transformation, assessing the technology environment, implementing and enabling systems and tools, change management, and training of the retained organization

- Procurement systems: helps to analyze, license, deploy, activate, and maintain e-procurement technologies, and collaborations with prominent third-party vendors

- Performance management: it includes procurement, spending, savings, ESG, risk and compliance management, analysis reporting, policy, and process design

Category expertise

Sourcing and category management specialists, market intelligence, and tools across 20 industries for direct and indirect categories of spend – technology; energy; marketing; human resources; insurance and benefits; professional services; travel; property and facility management; technical services and equipment; industrial and Maintenance, Repair, and Operations (MRO); logistics and supply chain; metals; plastics; food; petroleum-based materials; specialty and commodity chemicals; explosives; packaging; and others for discrete, process, and contract manufacturing

Spend managed for external clients

US$700 billion

Accenture profile (page 2 of 9)

Overview

Key PO-related developments

- **2023:** committed to investing US$3 billion in generative AI over the following three years, and it is included in its procurement services technology roadmap; its supplier discovery and risk tool generates reports that aid in the identification, evaluation, and qualification of vendors

- **2023:** made 37 acquisitions, 33 of which were procurement-related; examples include Insight Sourcing Group, a strategic sourcing and procurement services company with a wide network of private equity clients, which enhanced Accenture's knowledge in this area; Impendi, a sourcing and procurement services provider with a focus on private equity clients, adding a crucial capability to Accenture's growing solutions for this industry; and Shelby Group for its procurement technology consultancy capabilities

- **2023:** launched Category Workbench, a comprehensive digital platform that centralizes all category administration tasks while increasing efficiency through proactive insights, activity tracking, and content management; it interacts with essential systems, giving category managers and other stakeholders swift access to relevant information in a streamlined manner

- **2023:** deployed P2P 2.0, PR, and PO management workflow with enhanced hyperautomation, compliance monitoring, analytics, and increased productivity, and made advancements in PO and order management, solidifying its focus on direct materials and supply chain integration

- **2023:** hired 334 procurement outsourcing professionals to its team to support double-digit growth in demand for its services due to continuous advances in productivity

Distribution of FTEs across processes

● <100 FTEs   ● 100-500 FTEs   ● >500 FTEs

● Source-to-Contract (S2C)   ● Procure-to-Pay (P2P)

Scale of operations
Number of PO FTEs[1] over time

24,000 — 2021

26,000 — 2022

27,000 — 2023
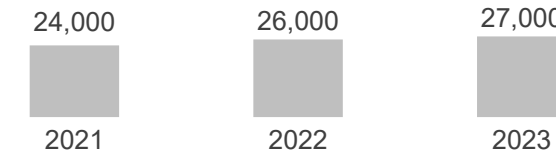
1 Includes accounts payable and invoice processing FTEs

Accenture profile (page 3 of 9)
Client portfolio

[NOT EXHAUSTIVE]

Major PO clients

Aon Corporation, Baker Hughes, Campari Group, Cigna, Doosan, Haliburton, Sanofi, Sysco Corp., and several global industry giants in the service, manufacturing, and public sectors. These industries include aerospace and defense, automotive, banking and finance, biotechnology and pharmaceuticals, healthcare, chemicals, energy, entertainment, food and beverage, technology, oil and gas, OEM, retail, natural resources and mining, telecommunications, utilities, government, and others.

Recently announced multi-process PO engagements

Time of signing	Client	Contract details
August 2023	Leading oil field services company	Operational transformation, cost takeout, and innovation initiative
August 2023	International aerospace and defense company	Spend transformation across all indirect categories
August 2023	Global beauty and fragrance company	Improve operations and streamline and enhance supplier services
July 2023	Global insurance and professional services firm	Extension of S2P services to continue achieving delivered results
February 2023	Multinational personal care company	Digital transformation across multiple towers
February 2023	Multinational clothing retailer	Spend transformation to drive significant, bottom-line savings
February 2023	European government agency	Enhance efficiency and user experience with the implementation of a digital platform
January 2023	European government agency	Transformation of procurement for productivity, compliance, visibility, etc.
January 2023	Global energy company	Cost containment and OPEX improvement

Revenue mix by buyer geography (2023)

Latin America (5-10%)
North America (35-40%)
APAC (20-25%)
UK & Rest of Europe (30-35%)
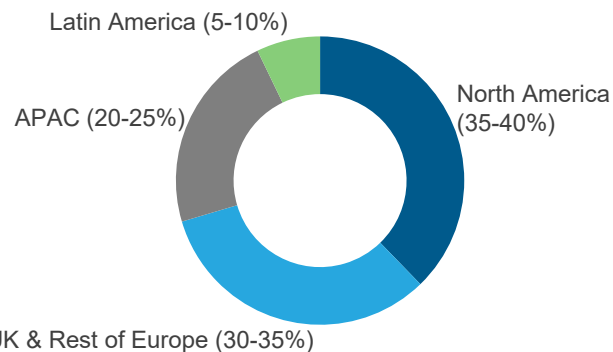
Revenue mix by buyer industry (2023)

Travel and logistics (1-5%)
Others (1-5%)
Public sector (5-10%)
Energy and utilities (25-30%)
Healthcare and life sciences (5-10%)
Hi-tech and telecom (10-15%)
CPG and retail (20-25%)
Manufacturing (10-15%)
Financial services (10-15%)
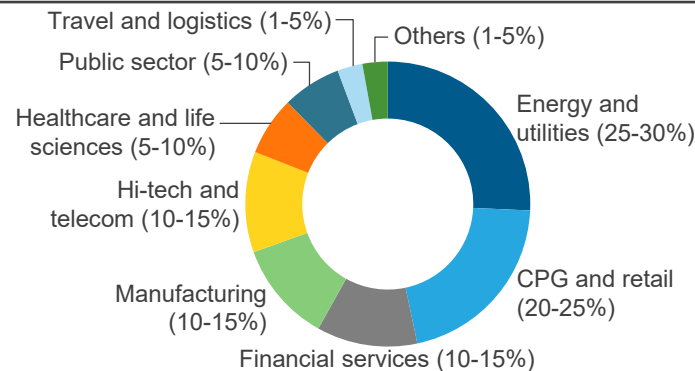
Revenue mix by buyer size[1] (2023)

SMBs 12%
Midsize 17%
Large 71%
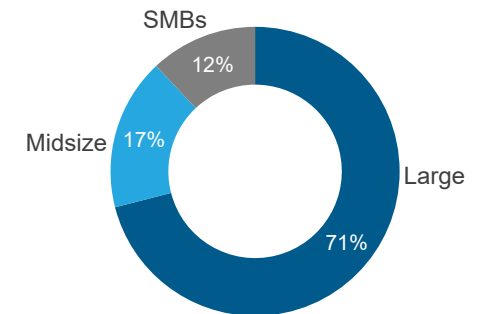
1 Large buyers (revenue >US$5 billion), midsize buyers (revenue US$1-5 billion), and SMB buyers (revenue <US$1 billion)

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Technology solutions

PO technology approach

Technology solutions	SynOps S2C	SynOps P2P	
Solution description	SynOps S2C streamlines the S2C process by leveraging real-time market and project intelligence to optimize user productivity and decisions, resulting in better results, savings, responsible sourcing, and total value. Dashboards offer visibility into projects, pipelines, and results. The platform is intended to provide flexibility in managing projects and programs cooperatively between Accenture and clients. The embedded functionality includes: • S2C Workflow • S2C Control Tower • Jaggaer Advanced Sourcing Optimizer (ASO) And Auctions • Savings Tracking • Spend Management Platform • Buyer Portal • Mysupplier Dashboard • Supply Chain Risk Advisor • PMIA Supplier Intelligence • Independent Vendor Verification The collaborative digital workflow platform collects worldwide category and performance data on a large scale, allowing for advanced analytics and automation to create cognitive intelligence solutions. Using dynamic interfaces and predictive analytics, the portfolio of 100+ category insights and apps enables educated spending, savings, and compliance decisions.	SynOps P2P leverages applied intelligence to improve workflow efficiencies and deliver actionable insights into transactional operations. This involves leveraging a cloud-based automation engine to drive work and AI to automate ~90% of requisitions and PO triage. It also automatically checks and populates data for the few remaining exceptions to reduce human processing requirements and entry errors. Accenture uses this platform to provide clients with touchless processing rates of up to 80% for the whole P2P process. Through the simple integration of invoicing process data, workflow orchestration, helpdesk, and vendor data master flows, the new P2P control tower offers end-to-end performance and targeting capabilities. It makes use of order tracking and buyer and supplier support embedded technologies to enhance user experience and encourage compliance. Analytical tools facilitate audits, working capital optimization, continual improvement, and the management of payment amounts and timeliness. The following are some of the embedded tools: • P2P Workflow • P2P Control Tower • Buyer Portal • Digital Procurement Agent • Intelligent Helpdesk • Volumetric Reporting • SLA Tracking • Policy Compliance	• Automated AP • Document Flow Manager (DFM) • Transaction and Compliance Automation Tool • Payables Optimizer • Intelligent Invoice Advisor • Invoice Processing Advisor • Intelligent T&E Advisor

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Technology solutions

PO technology approach

Technology solutions	SynOps S2C	SynOps P2P
process scope	S2C project and process management: end-to-end, includes automated sourcing project workflow, document and content management, 1,000+ category-specific strategy blueprints, custom eRFX module, contracting and contract management, market intelligence, spend, savings, compliance, performance data management, analysis, and reporting tools.	P2P process management: end-to-end, P2P scope includes automated requisition, PO, invoice and payment processing (including three-way matching), exceptions handling, master data management, eCatalogs, spot buy / transactional sourcing, buyer and supplier support, T&E, buyer behavior, compliance, supplier and performance analytics, and reporting tools.
Technology leveraged	Accenture's in-house technology combines third-party tools with integrated capabilities for specialized procurement and technology enablers. The procurement data lake leverages Google Cloud Platform (GCP) and combines rules-based automation, AI, and digitization. SynOps enhances the client's existing records, ERP, and e-procurement systems by coordinating information throughout the ecosystem to serve as the platform of platforms. Accenture's ecosystem includes several technology partners, including Jaggaer, SAP Ariba, Coupa, and Ivalua, which help with work orchestration. It has Arabesque, Celonis, EnergyMarketPrice, Envizi, Fairmarkit, Globality, Icertis, Ignite, Level10 Energy, LodgX Analytics, ProcessUnity, Resilinc, Sabre, SirionLabs, UBM, Venminder, Verusen, and WatchWire for further insights and intelligence. It has ABBYY, D&B, EcoVadis, IBISWorld, Lanyon, PeopleTicker, TechEdge, TRA-SER, Upply, and many other partner technologies to supplement different data	
Delivery model and pricing	• It has cloud-based, multi-client platforms and embedded tools • The SynOps for procurement platform is central to all solutions. It is included in the delivery and overall program fees and is used by Accenture and client-retained teams. APIs link client and third-party data throughout the procurement ecosystem • Digital insights and performance apps are further adjusted to client-specific instances or new apps produced in collaboration with clients • Depending on the program scope, SynOps S2C, SynOps P2P, and constituent modules such as contracting, buyer portal, or analytics are provided on a stand-alone basis, or linked to enable extra closed-loop capabilities	

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Location landscape

PO delivery locations

World map showing PO delivery locations:

Fredericton, Pittsburgh, Needham, Knoxville, Berwyn, San Antonio, San Jose, Sao Paulo, Belo Horizonte, Buenos Aires, Prague, Stavanger, London, Madrid, Milan, Bratislava, Krakow, Warsaw, Iasi, Bucharest, Timișoara, Johannesburg, Port Louis, Jaipur, Delhi, Mumbai, Hyderabad, Bangalore, Chennai, Kuala Lumpur, Dalian, Chengdu, Shanghai, Shenzhen, Tokyo, Manila, Cebu, Semarang, Brisbane

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Everest Group PO assessment – Leader and Star Performer
Everest Group S2C assessment – Leader

Measure of capability: ◐ Low ● High

	Market impact				Vision and capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
PO	●	◔	◔	◕	◔	●	◔	●	●
S2C	●	◔	◔	◕	◔	●	◔	●	◕

Strengths

- Accenture has strong capabilities to serve clients across procurement through its end-to-end S2P offerings powered by its SynOps platform, which connects people, processes, technologies, and data, to deliver a simplified procurement experience to clients
- Accenture has good breadth and depth of category expertise due to its experience in managing large amounts of spend across a wide range of industry-specific direct and indirect-spend categories such as IT and telecom, utilities, logistics, MRO, technical services, and insurance and benefits. Its ability to achieve savings, support negotiations, offer category expertise, and provide market intelligence are often highlighted as key strengths by its clients
  - The ClearEdge acquisition deepened its category expertise in the IT category and further enhanced its ability to drive digital transformation
  - It offers industry-specific, contextualized procurement services, especially for sourcing direct-spend categories

- Its SynOps platform integrates in-house, acquired, and third-party partner solutions/platforms, which are made available for client-retained organizations to facilitate collaboration and process efficiency
  - Its SynOps S2C module supports clients across processes such as spend analytics, supplier management, and contract management. Its category workbench offers market intelligence, workflow automation, and cognitive intelligence support for category management
  - SynOps platform acts as an integration layer for third-party solutions across procurement analytics and strategy (Celonis, Seivo, and Cirtuo), supplier management (Resilinc and Ecovadis), contract management (Icertis and Globality), and procurement platforms (SAP Ariba, Jaggaer, Fairmarkit, and Coupa)
  - SynOps is embedding generative AI use cases such as contract analytics and supplier identification to enhance user experience

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Everest Group PO assessment – Leader and Star Performer
Everest Group S2C assessment – Leader

Measure of capability: ◔ Low ⬤ High

	Market impact				Vision and capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
PO	⬤	◕	◔	◑	◔	⬤	◔	⬤	◑
S2C	⬤	◕	◕	◑	◔	⬤	◔	⬤	◑

Strengths

- Its recent acquisitions expand its capabilities and add specialized expertise, to serve new segments
    - Acquired Impendi and Insight Sourcing, with strong capabilities to serve Private Equity (PE) firms
    - Acquired The Shelby Group, with focused capabilities across P2P and platform implementation
- It leverages its learning and upskilling platform, Procurement Academy, to help employees build upstream skills across sourcing, negotiation, and category-management
- Accenture offers sustainability services aimed at improving supplier diversity, fostering responsible sourcing, and building category-specific sustainability playbooks

    - Partnered with Station A (AI-powered clean energy marketplace), LevelTen (a renewable energy marketplace), FlexiDAO (blockchain-based carbon footprint tracker), and Google (advocating carbon-free energy)
- Clients appreciate Accenture's high-quality service delivery, responsiveness, and focus on continuous improvement

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Everest Group PO assessment – Leader and Star Performer

Everest Group S2C assessment – Leader

Measure of capability:　◖ Low　● High

	Market impact				Vision and capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
PO	●	◕	◔	◖	◔	●	◔	●	●
S2C	●	◕	◕	◖	◕	●	◕	●	◖

Limitations

- Accenture's focus on driving end-to-end procurement transformation for clients limits its ability to serve companies looking for packaged domain-specific and Business Process-as-a-Service (BPaaS) solutions beyond outsourcing solutions
- Clients looking for high flexibility in terms of contract structuring, relationship management, and significant handholding throughout their operational transformation journeys may not find Accenture to be the right fit

- Clients would like Accenture to be more proactive and innovative in suggesting changes or improvements to its current state of operations
- Clients expect Accenture to ensure better support in their day-to-day operations and offer in-depth benchmarking backing also where necessary
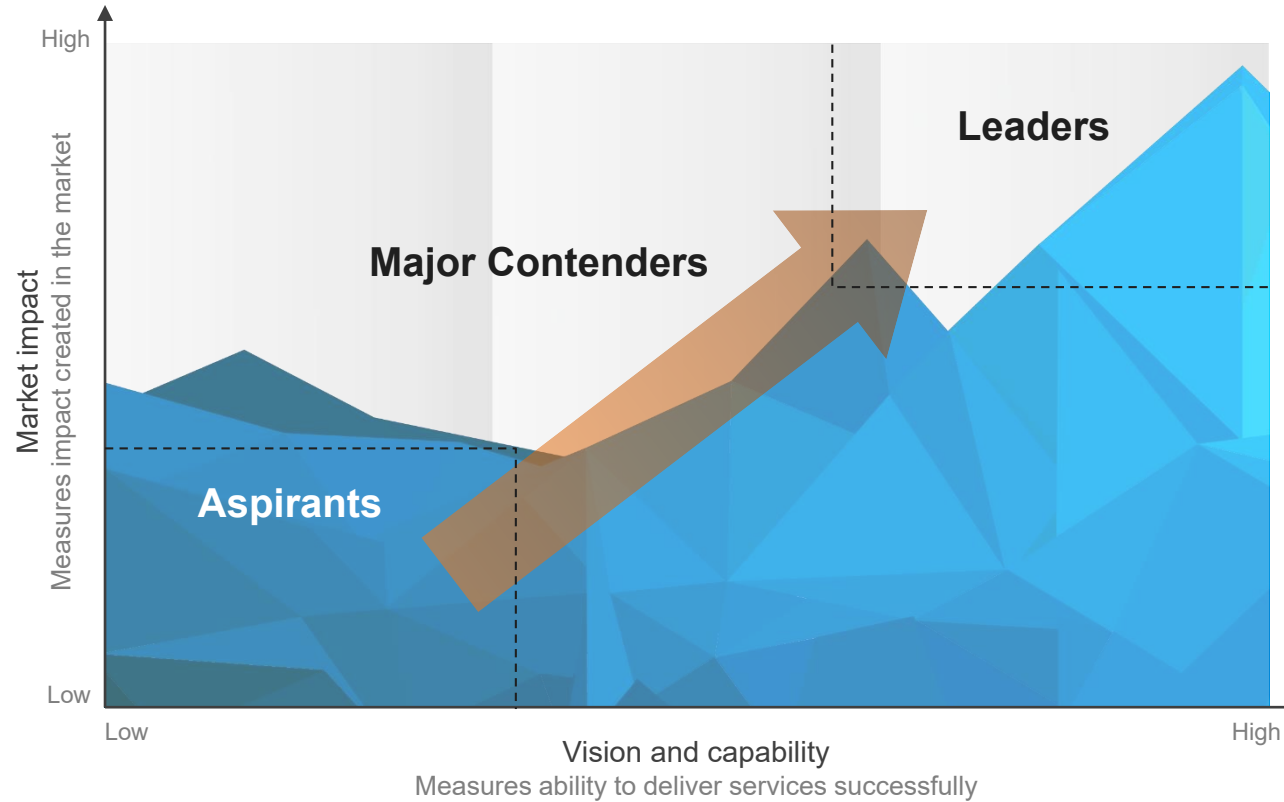
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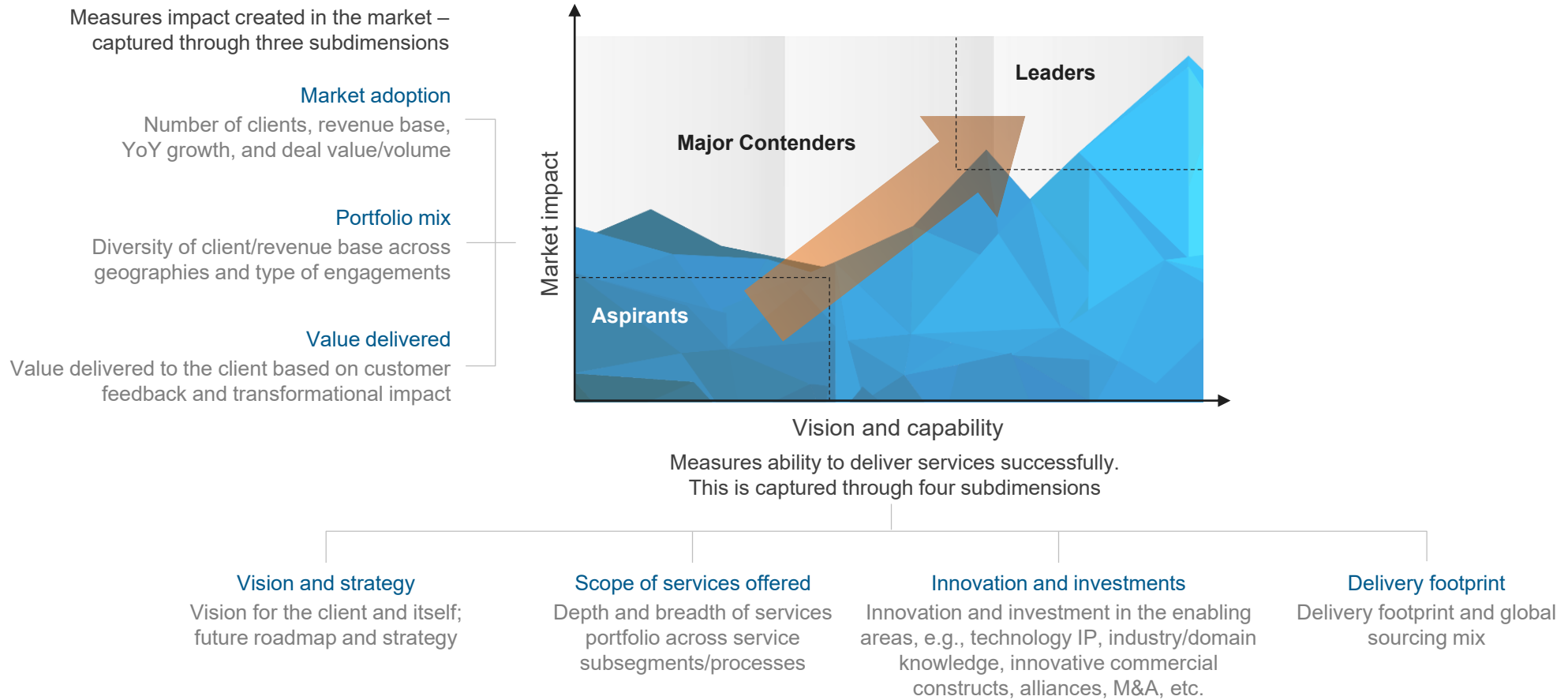
PEAK Matrix® framework

FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix

Please click Everest Group PEAK Matrix® for more information

Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption

Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix

Diversity of client/revenue base across geographies and type of engagements

Value delivered

Value delivered to the client based on customer feedback and transformational impact

Market impact

Leaders

Major Contenders

Aspirants

Vision and capability

Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments

Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint

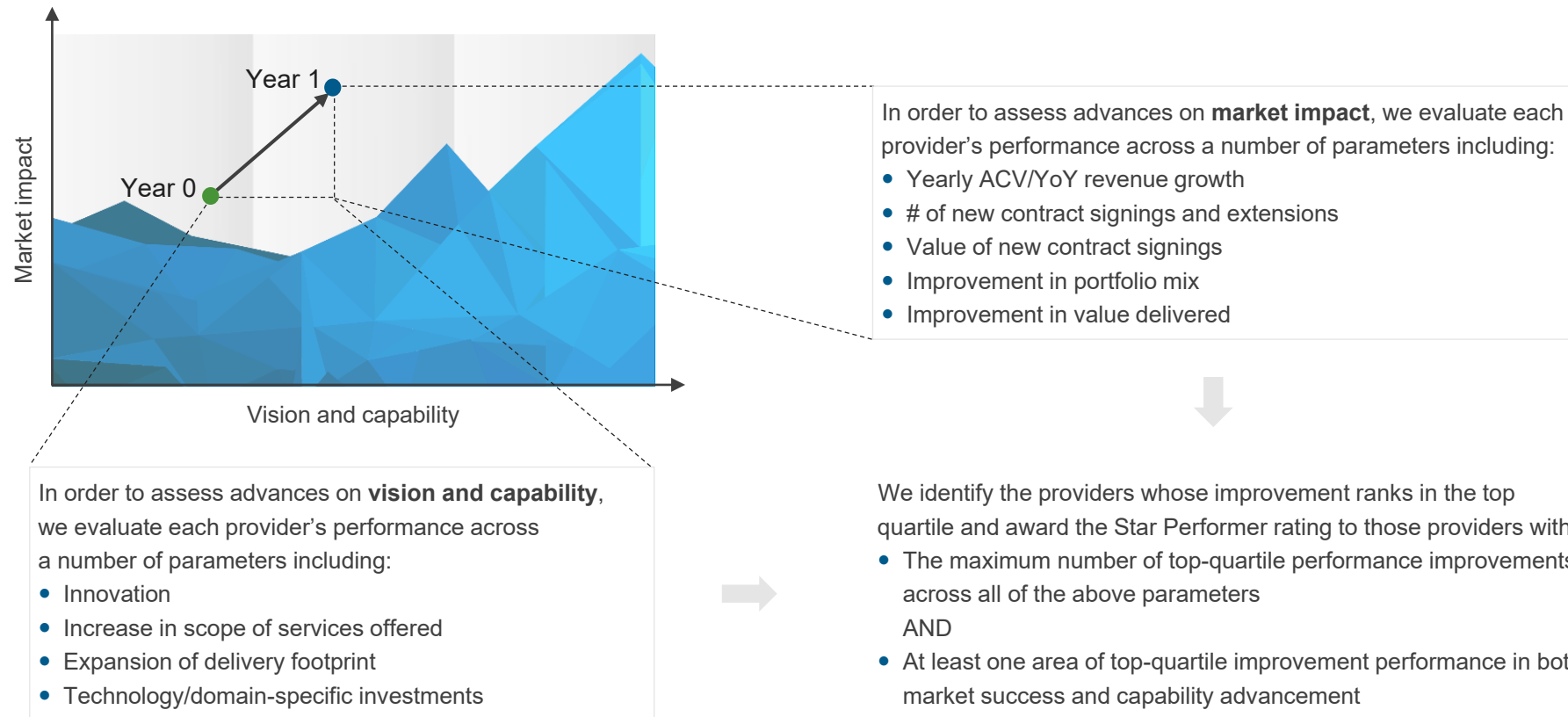Delivery footprint and global sourcing mix

Everest Group confers the Star Performer title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix

In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:

- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each provider's performance across a number of parameters including:

- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain-specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:

- The maximum number of top-quartile performance improvements across all of the above parameters
  AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries

- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies

- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR

- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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