

Targeting Public Sector Shared Services BPO

Market Analysis
Abstract

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Who Is This Report For?

- NelsonHall's "Targeting Public Sector Shared Services BPO" report is a comprehensive market assessment report designed for:
- Sourcing managers investigating sourcing developments within public sector shared services BPO market
- Vendor marketing, sales and business managers developing strategies to target public sector shared services BPO opportunities
- Financial analysts and investors specializing in the BPO services sector, including public sector shared services outsourcing.

Scope of the Report

The report analyzes the worldwide market for public sector shared services BPO and addresses the following questions:

- What is the market size and projected growth for the global market by geography?
- What is the profile of activity in the global public sector shared services BPO market?
- What are the top drivers for adoption of public sector shared services BPO?
- What are the benefits currently achieved by users of public sector shared services BPO?
- What pricing mechanisms are typically used within public sector shared services BPO and how is this changing?
- Who are the leading public sector shared services BPO vendors globally and by geography?
- What is the current pattern of delivery location used for public sector shared services BPO services and how is this changing?
- What are the challenges and success factors?



Key Findings & Highlights

NelsonHall's market analysis of public sector shared services BPO consists of 53 slides.

Outsourcing of public sector shared business services is on the rise globally, with U.S. and U.K. leading adoption. Demand is growing across all segments of the public sector including federal/central, regional/local governments and health and education.

- Vendor confidence for growth is particularly high in middle-office services, with many anticipating double digit growth in segment revenue y/y. Vendors are investing in their capabilities, such as Business Process as a Service (BPaaS), in order to increase their share of the market. BPaaS is becoming the de facto delivery model for small and mid-market clients and single process BPO
- The rise of BPaaS will see contract pricing changing to transaction and utility-based models, boosted by the promise of ease of deployment and on-demand supply to cater for capacity fluctuations
- U.S. and U.K. are the significant markets, with U.S. dominating despite its market being less mature in shared services BPO. U.K. is moving along the maturity axes fastest due to government policy. This is not only driven by cost efficiency but the prospect of generating revenue, in cases where a public agency has the potential to become partially self-funding.

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Report Length

53 pages, consisting of 8 chapters

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