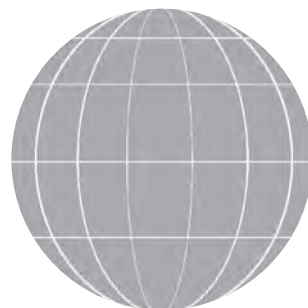


# THE GLOBAL OUTSOURCING

# 100

# 2015



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# THE OUTSOURCING EVOLUTION

Companies aren't interested in hiring the least expensive outsourcing provider anymore. They want high-quality, innovative work, and they're willing to pay for it.



**G**ONE ARE THE DAYS when outsourcing simply meant hiring cheap offshore labor. Over the last several years, companies have realized that paying more for quality work and building long-term

partnerships yields better results than outsourcing to the lowest bidder. "Companies aren't trying to look for someone to come in and take over, and do it faster and cheaper," says Michael Corbett, founder and chairman of the International Association of Outsourcing Professionals (IAOP), an organization that counts 120,000 outsourcing companies and individuals as members and affiliates. "Outsourcing is now part of a company's fundamental strategy."

This change in mind-set has helped the outsourcing sector grow from a \$70 billion business in 2004 to a \$104 billion business today, according to Statista. It's also not just a manufacturing-focused industry anymore. Companies can outsource nearly everything, from food services and housing logistics to software development and employee relocation assistance. Executives have also realized that it's better to work with a

company that specializes in a particular area, so that they can focus on their own company's core competencies, says Corbett.

#### Finding Flexibility

As price points have evolved, so too have company expectations. Today's executives want their outsourcing partners to offer flexibility. That could mean quickly adding or reducing staff, instantly jumping on a new project, finding short-term cost savings, and more. Companies want partners that can quickly adapt to our constantly changing world, says Corbett. "How many companies were on top, only to suddenly play catch-up because they fell behind in technological innovation?" he asks. "Companies need flexibility and the ability to refocus relationships so they can stay ahead."

More than just flexibility, though, companies are looking for partners that can evolve with a business and help it grow long-term. That's one of the biggest changes that Jeff Gravenhorst has seen in the outsourcing industry. The group CEO of ISS World Services, a Copenhagen, Denmark-based outsourcing company that specializes in facility services, says companies don't just want people to clean a floor or make a meal anymore. They want to work with someone who can help



Blanca Trevino, IAOP Hall of Fame inductee and CEO of Softtek travels 46 to 48 weeks a year to countries where they have operations.

for a clean floor, it doesn't just want a clean floor. "It wants it to be clean for a reason," says Gravenhorst. Take shopping, for instance: Research shows that the cleaner the mall floor, the more customers are likely to spend. "It's about creating an environment that can help our client increase revenues," he says. "We're not just there to make the floor clean."

them retain clients and create culture. "When it comes to food, it's not just about getting something to fill your stomach," he says. "Now we create a restaurant where people can socialize, and that helps retain and attract staff."

With 510,000 employees, ISS World Services is one of the largest and oldest outsourcing operations on the planet. Over the years, the 114-year-old company has learned that when a company asks

#### Best at Business

As an increasing number of CEOs realize how outsourcing can add value to a company, outsourcing companies need to ensure that their own operations are running smoothly. An outsourcing provider "must be a good business in its own right," says Corbett. That means having a good leadership team, strong management,

(Continued on page S6)

## Going Steady

**In outsourcing, a long-term relationship can make all the difference.**

**One sign of a successful outsourcing partnership is longevity.** Case in point: global IT outsourcing business Miratech Group has been working seamlessly with its client Genesys, a developer of market-leading customer experience and contact center solutions, since 2000.

Miratech is one of many outsource partners that's helped Genesys grow to more than \$850 million in revenue by developing program

applications, deploying products, and working with their end users, among other things. "They get our evolving needs, and they're flexible in their business model," says Genesys CEO Paul Segre (left).

One reason why Miratech has built such a long-lasting relationship with Genesys—and many other clients—is because of its cost-efficient Managed Competence Center, which allows companies to transfer responsibility for selecting and recruiting the best talent, and project deliveries, says Miratech CEO Valeriy Kutsyy (right).

This allows clients to offload employee risk, quickly implement staffing changes, and more. It also helps Miratech to align with its clients. "We've worked to make Miratech part of the team," says Segre.

There's no doubt that this partnership will continue, says Kutsyy, who hopes to help grow Genesys by leaps and bounds. "We're helping them sell products and retain customers," he says. "We want to be part of keeping Genesys customers loyal and happy."



# IAOP GLOBAL OUTSOURCING 100

Company	Web Address	Size Judging Group	Size & Growth	Delivery Excellence	Programs for Innovation	CSR
<b>ACCELYA</b>	w3.accelya.com	Leader		↘	★	
<b>ACCENTURE</b>	accenture.com	Leader	★	★	★	★
<b>AEGIS</b>	aegisglobal.com	Leader				★
<b>AGS HEALTH PRIVATE LIMITED</b>	agshealth.com	Rising Star				
<b>AJUBA INTERNATIONAL</b>	ajubanet.net	Rising Star		↘		
<b>ALORICA</b>	alorica.com	Leader				
<b>ALTISOURCE</b>	altisource.com	Leader	↘	↘	↘	
<b>AON HEWITT</b>	aonhewitt.com	Leader	★		★	★
<b>ARTEZIO</b>	artezio.com	Rising Star				
<b>ASIAINFO TECHNOLOGIES (NANJING)</b>	asiainfo.com	Leader				
<b>AURIGA</b>	auriga.com	Rising Star				★
<b>BANNER MANAGED COMMUNICATION</b>	banner-managedcommunication.com	Leader				↘
<b>BLEUM</b>	bleum.com	Rising Star				
<b>BROOKFIELD GRS</b>	brookfieldgrs.com	Leader			↘	
<b>CANON BUSINESS PROCESS SERVICES</b>	cbps.canon.com	Leader		★	★	★
<b>CBRE</b>	cbre.com	Leader	★	★	★	★
<b>CGI</b>	cgi.com	Leader	★			★
<b>CIENET</b>	cienet.com	Leader		★		
<b>CLUTCH GROUP</b>	clutchgroup.com	Rising Star				
<b>COLLIERS INTERNATIONAL</b>	colliers.com	Leader	★	★	★	↘
<b>COMPETENCE CALL CENTER</b>	yourccc.com	Leader				
<b>CONCENTRIX</b>	concentrix.com	Leader	★		↘	
<b>CYBAGE SOFTWARE</b>	cybage.com	Leader		↘		
<b>DATAMATICS GLOBAL SERVICES</b>	datamatics.com	Leader		★		
<b>DDD</b>	digitaldividedata.org	Rising Star				↘
<b>DIEBOLD INTEGRATED SERVICES®</b>	diebold.com/integratedservices.com	Leader	↘			↘
<b>DONLEN</b>	donlen.com	Leader				
<b>DTZ (FORMERLY CASSIDY TURLEY)</b>	dtz.com	Leader	★	↘	↘	
<b>ELEKS</b>	eleks.com	Rising Star		↘		↘
<b>EMERIO GLOBESOFT</b>	emerio.com	Leader		↘		
<b>EXL</b>	exl.com	Leader	↘	★	↘	
<b>FIRSTSOURCE</b>	firstsource.com	Leader	↘		↘	
<b>FPT SOFTWARE COMPANY LIMITED</b>	fpt-software.com	Leader		↘		
<b>FUSION BPO SERVICES</b>	fusionbposervices.com	Rising Star				
<b>GRUPO ASSA</b>	grupoassa.com	Leader				
<b>GRUPO PROMINENTE</b>	grupoprominente.com	Rising Star				
<b>HARBINGER SYSTEMS</b>	harbinger-systems.com	Rising Star			↘	
<b>HCL TECHNOLOGIES LIMITED</b>	hcltech.com	Leader	★		★	★
<b>HGS</b>	teamhgs.com	Leader	★		↘	
<b>HP ENTERPRISE SERVICES</b>	hp.com	Leader	★		↘	★
<b>IBA GROUP</b>	ibagroupit.com	Leader		↘	★	
<b>INDECOMM GLOBAL SERVICES</b>	indecmm.net	Leader				
<b>INSIGMA</b>	insigma.com.cn	Leader		↘		↘
<b>INSPUR</b>	inspur.com	Leader	★			
<b>INTEGREON</b>	integreon.com	Leader			↘	
<b>INTETICS</b>	intetics.com	Rising Star		★		
<b>ISOFTSTONE</b>	isoftstone.com/en	Leader			↘	
<b>ISS</b>	issworld.com	Leader	★	★	★	★
<b>ISS ART</b>	issart.com/en	Rising Star				
<b>ITC INFOTECH</b>	itcinfotech.com	Leader		★		★

KEY: ★ Full Star: Highest Rated ↘ Half Star: Distinguished Leaders Judging Group: (larger, more established firms) Rising Stars Judging Group (smaller, emerging companies)

# IAOP GLOBAL OUTSOURCING 100

Company	Web Address	Size Judging Group	Size & Growth	Delivery Excellence	Programs for Innovation	CSR
<b>ITTRANSITION</b>	ittransition.com	Rising Star		↘	↘	
<b>JOHNSON CONTROLS GLOBAL WORKPLACE SOL</b>	johnsoncontrols.com/gws	Leader	↘	★		★
<b>JONES LANG LASALLE</b>	jll.com	Leader	★	★	★	★
<b>KELLY OUTSOURCING AND CONSULTING GRP</b>	kellyocg.com	Leader	↘	★	★	↘
<b>KNOAH SOLUTIONS</b>	knoah.com	Rising Star				
<b>L&amp;T INFOTECH</b>	lntinfotech.com	Leader	↘	↘	★	★
<b>LEASEPLAN USA</b>	us.leaseplan.com	Leader	↘			↘
<b>LEGALBASE</b>	legalbaselaw.com	Rising Star				
<b>LUXOFT</b>	luxoft.com	Leader		★		
<b>MAYKOR</b>	maykor.com/en	Leader	↘	★	★	↘
<b>MERA</b>	merasws.com	Leader		↘		
<b>MINACS GROUP</b>	minacs.com	Leader				
<b>MINDTREE</b>	mindtree.com	Leader		★		↘
<b>MIRATECH</b>	miratechgroup.com	Rising Star			↘	
<b>MOTIF</b>	motifinc.com	Rising Star				↘
<b>NEORIS</b>	neoris.com	Leader			↘	
<b>NEWMARK GRUBB KNIGHT FRANK</b>	ngkf.com	Leader	★		↘	
<b>NIIT TECHNOLOGIES</b>	niit-tech.com	Leader				
<b>ORANGE BUSINESS SERVICES</b>	orange-business.com	Leader	↘		↘	★
<b>OXAGILE</b>	oxagile.com	Rising Star				
<b>PACTERA</b>	pactera.com	Leader	↘	★	↘	★
<b>QUATRRO</b>	quattro.com	Leader		↘		↘
<b>RESOURCE PRO</b>	resourcepro.com	Rising Star				
<b>RR DONNELLEY GLOBAL OUTSOURCING</b>	outsourcing.rrd.com	Leader				★
<b>SERVICENGINEBPO</b>	sebpo.com	Rising Star				
<b>SITEL OPERATING CORPORATION</b>	sitel.com	Leader	★	↘		↘
<b>SOFTENGI</b>	softengi.com	Rising Star		↘		
<b>SOFTJOURN</b>	softjourn.com	Rising Star			↘	↘
<b>SOFTSERVE</b>	softserveinc.com	Leader				↘
<b>SPI GLOBAL</b>	spi-global.com	Leader		↘		
<b>STEFANINI</b>	stefanini.com	Leader	★			↘
<b>SUTHERLAND GLOBAL SERVICES</b>	sutherlandglobal.com	Leader	★			
<b>SWISS POST SOLUTIONS</b>	swisspostsolutions.com	Leader	↘	↘		↘
<b>SYKES ENTERPRISES</b>	sykes.com	Leader	★	↘		
<b>SYNTEL</b>	syntelinc.com	Leader	↘			
<b>TATA COMMUNICATIONS TRANSFORMATION SVC</b>	tatacommunications-ts.com	Leader		↘		
<b>TEAM INTERNATIONAL SERVICES</b>	teaminternational.com	Rising Star			↘	↘
<b>TECH MAHINDRA BUSINESS SERVICES GROUP</b>	techmahindra.com	Leader	★			★
<b>TELEPERFORMANCE</b>	teleperformance.com	Leader	★		↘	★
<b>TELETECH</b>	teletech.com	Leader	↘			↘
<b>TGESTIONA</b>	tgestiona.com.pe	Leader		★	↘	
<b>TIVIT</b>	tivit.com.br	Leader	↘	★		
<b>TOWERS WATSON</b>	towerswatson.com	Leader	★		↘	
<b>TRANSCOSMOS</b>	trans-cosmos.co.jp/english	Leader	↘			
<b>TRIGENT SOFTWARE</b>	trigent.com	Rising Star		↘		
<b>VADS BUSINESS PROCESS SDN. BHD.</b>	vads.com	Leader				
<b>VIRTUSA CORPORATION</b>	virtusa.com	Leader				★
<b>WICRESOFT</b>	wicresoft.com	Leader			★	↘
<b>WNS GLOBAL SERVICES PRIVATE LIMITED</b>	wns.com	Leader	↘	↘	↘	
<b>XCHANGING</b>	xchanging.com	Leader			↘	★

## IAOP WORLD'S BEST OUTSOURCING ADVISORS

Company	Web Address	Size & Growth	Delivery Excellence	Programs for Innovation	Company	Web Address	Size & Growth	Delivery Excellence	Programs for Innovation
ALSBRIDGE	www.alsbridge.com	★	★	★	KPMG	www.kpmg.com	★	★	★
AVASANT	www.avasant.com	★	★		MATRYZEL CONSULTING	www.matryzel.com			
BAKER & MCKENZIE	www.bakermckenzie.com	★			MAYER BROWN	www.mayerbrown.com	★	★	
BIRD & BIRD	www.twobirds.com	★			NEO GROUP	neogroup.com			★
DELOITTE	www.deloitte.com/us	★	★	★	OLSWANG	www.olswang.com	★		
ELIX-IRR PARTNERS	www.elix-irr.com				PACE HARMON	www.paceharmon.com			
EY	www.ey.com	★	★	★	PILLSBURY WINTHROP SHAW PITTMAN	www.pillsburylaw.com/globalsourcing			
FOLEY & LARDNER	www.foley.com				PWC STRATEGY&	www.strategyand.pwc.com; www.pwc.com	★	★	
INFORMATION SERVICES GROUP, INC. (ISG)	www.isg-one.com	★	★		QUINT WELLINGTON REDWOOD	www.quintgroup.com		★	★
KIRKLAND & ELLIS	www.kirkland.com		★	★	ZINNOV MANAGEMENT CONSULTING	www.zinnov.com	★		★

KEY: ★ Full Star: Highest Rated ★ Half Star: Distinguished

the ability to develop talent, and a track record of innovation. Corbett points to IAOP's Global Outsourcing 100—a list of the world's best outsourcing service providers that showcases companies excelling in the areas customers

care most about—as a great place to find well-run partners.

Unlike in the past, when companies would often switch partners when a cheaper option came along, executives now want to develop long-term relationships with their outsourcing partners. "That's what outsourcing is really about," says Corbett, "creating these long-lasting partnerships with outside organizations that have unique capabilities and skills."

Many companies are also looking for partners that staff programs with their own employees, rather than using sub-contractors who might not meet their standards. That's one of the keys to Miratech Group's success. The Stockholm- and Washington, D.C.-based IT outsourcing company has 870 staff members, many with Ph.D.s and master's

degrees. "We don't compromise on the people we hire," says Miratech CEO Valeriy Kutsyy.

When it comes to the IT sector, a lot of companies can't hire fast enough, nor can they find the level of skill needed to assure success. Miratech has access to some of the best tech-sector employees in Eastern Europe, where its R&D centers are based. "We attract and retain top people, and that allows our clients to focus on their higher priorities," says Kutsyy.

### Importance of Innovation

There are many kinds of outsourcing businesses, but one of the common denominators among the best is that they're technology-driven, says Neil Hirshman, an outsourcing expert with Chicago-based law firm Kirkland & Ellis and a member of the IAOP's Strategic Advisory Board. That wasn't as important years ago, but it's critical today. Technology is allowing outsourcing companies to be more innovative, to reduce costs, and to give their clients better service.

For instance, a large food services outsourcer could have equipment and employees working on thousands of different jobs all over the world. At one time, it was hard to keep track of what everyone was doing. Now, there's software that can tell where every staffer is located and if every piece of equipment is accounted for. "Technology, such as cloud computing and mobile technology, has really changed the way a lot of these companies operate," says Hirshman.

Today, clients are looking to their IT outsourcing partners for innovative solutions to drive growth. IT consulting and outsourcing company Virtusa Corporation, based in Westborough, Mass., is such a partner. Its ERA Insight tool im-



Widely regarded as the pioneer and "Guru" of the Indian BPO industry, Raman Roy (right) has played a pivotal role over the last two decades in proving that India can be a preferred location for remote processing.

tions. "Outsourcing has come a long way since the '90s. Increasingly, the trend is toward enterprises adopting sourcing strategies that require the partner to rapidly innovate and transform, and at the same time make their operations efficient and agile."

### More Vendors, Shorter Contacts

One of the changes in this sector has been an increase in the diversity of companies that offer outsourcing services. While that growth has a lot to do with a greater acceptance of the outsourcing model, it's also a result of technological innovation. Now companies can provide services from almost any location, says Michael Stoler, a senior manager in Deloitte Consulting LLP's Outsourcing Advisory practice. In fact, Deloitte's recent Global Out-

proves software productivity and quality. Its Kore platform helps clients increase automation and transform IT operations "from reactive to preemptive," and its social platform helps engineers co-create solutions for clients in real time.

"Our clients are asking, 'Is my vendor helping me innovate, or are they stuck in the past?'" says Harsha Kumar, Virtusa's senior vice president of outsourcing and transformational industry solu-

tion, says Michael Stoler, a senior manager in Deloitte Consulting LLP's Outsourcing Advisory practice. In fact, Deloitte's recent Global Out-

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sourcing and Insourcing Survey found that 50% of its clients think technology will diminish the importance of location, while 12% say it won't matter at all where services are delivered.

There has also been a trend toward shorter and smaller contracts, says Stoler. In the past, companies might sign decade-long megadeals with one outsourcing provider; now contracts are more likely to be three to five years and have a more focused scope. Why? "Flexibility and innovation. Customers are getting savvier," says Stoler. "They want to find the best-fit vendor for a service, and they want to retain agility. The more-frequent renewal cycle also creates healthy competition, which incentivizes vendors to be innovative."

The increase in providers and shorter-term contracts could mean that companies are now using far more outsourcing companies than ever before. They want to take a "best in breed" approach, which means they'd rather work with a number of companies who can all do different things well than one company that says it can do it all.

Managing all those relationships can be a challenge, says IAOP Strategic Advisory Board

member Hirshman, which is why many companies are hiring managers to oversee their various outsourcing partners. Some businesses are hiring third parties to manage this process; others are hiring internally. "You need someone to oversee and integrate all of these providers," he says.

**More Growth Ahead**

As much as the outsourcing industry has grown over the last decade, it's only going to expand further, says Hirshman. Companies are getting more sophisticated and are looking for more partners to work with. Expectations are higher, however, which means outsourcing companies will have to raise their own bar and work harder to distinguish themselves from the competition, he adds.

The increasing use of technology is driving much of the sector's growth in nearly every area. Until a few years ago, for instance, companies didn't spend a dime on social media. Now consumer-facing global corporations have to oversee social accounts in multiple countries, develop a social media strategy, and use the right people

**Companies can outsource nearly everything, from food services and housing logistics to software development and employee relocation assistance.**



Dylan Taylor (right), Global Chief Operating Officer of Colliers, shares his vision.

who can help them with that part of the business, says IAOP chairman Corbett.

These days, nearly every company big and small outsources some part of its business. Otherwise, we wouldn't have many of the products and services that we have today. Think of a cellphone, says Corbett: Companies outsource numerous parts of that device's production. "I don't just mean

and tools to manage it all. Many businesses aren't interested in building out an entire social media team; rather, they're looking for someone

manufacturing," he says. "The engineering, the intellectual property, the design. If we didn't have outsourcing, it wouldn't exist." ●



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To get involved, visit [WWW.IAOP.ORG](http://WWW.IAOP.ORG)



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