Business Process Outsourcing (BPO) - Global Strategic Business Report

Description: This report analyzes the worldwide markets for Business Process Outsourcing (BPO) in US$ Million by the following Horizontal Segments: Finance & Accounting, Customer Services, HR, KPO, and Procurement. The market is also analyzed by the following End-Use Segments: Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Others.

The report provides separate comprehensive analytics for the US, Canada, Japan, Europe, Asia-Pacific, Latin America, and Rest of World. Annual estimates and forecasts are provided for the period 2015 through 2022. Also, a six-year historic analysis is provided for these markets. Market data and analytics are derived from primary and secondary research.

Company profiles are primarily based on public domain information including company URLs. The report profiles 198 companies including many key and niche players such as -

- Accenture Plc
- Aon Hewitt
- Automatic Data Processing, Inc.
- Capgemini
- Capita Plc

Contents: I. INTRODUCTION, METHODOLOGY & PRODUCT DEFINITIONS

Study Reliability and Reporting Limitations
Disclaimers
Data Interpretation & Reporting Level
Quantitative Techniques & Analytics
Product Definitions and Scope of Study
Horizontal Segment
Finance & Accounting
Customer Services
Human Resources Outsourcing
Knowledge Process Outsourcing
Procurement BPO
End-Use Segments
Manufacturing
Telecommunications & Technology
Banking, Insurance & Finance Services (BFSI)
Retail
Others

II. EXECUTIVE SUMMARY

1. INDUSTRY OVERVIEW
Business Process Outsourcing (BPO)
A Prelude
Advantages Offered by BPOs
BPO and its Role in Driving Global Expansion
Importance of BPO
Emerging Trends in BPO Industry
Current and Future Analysis
The Changing Scenario
Disruptive Forces Line the Future BPO Model
Overview of the Outsourcing Industry amid Economy Upheavals
Impact of Global Economic Crisis on the BPO Industry
Debt Crisis Drives Investors to become Risk Averse
Economy Outlook
Table 1: World Real GDP Growth Rates in % (2014-2017P): Breakdown by Country/Region (includes corresponding Graph/Chart)
Emerging Markets Drive Growth
The Asian BPO Phenomenon: Enabled by `Triple Convergence'
BPO Operations Bringing Appreciation to Eastern Countries
Trade-off between Quality and Cost Warrants Revamp of the Global BPO Industry
Uncertainties in Politico-Economic Policies Challenge BPO Sector
Benefits of Shared Services Propels BPO in Banking Sector
Re-shoring Strategies Highlight Salary Disparities in Different Regions
Growth Opportunities in Service Segments
BPO Adoption in End-User Markets

2. MARKET DYNAMICS
Outsourcing: More a Win-Win than a Zero-Sum Game
BPO: Its Effects on the Lifestyles of the Workforce
BPO's Effect on Process Work
Sourcing Strategy/Model: Means to Achieve Business Process
Sole Sourcing
A Model for Increasing Operational Efficiency
One-Stop-Shop for Comprehensive HR Outsourcing
Multi-Source Approach: Gains Strength
Benefits of Multi-Sourcing Approach
Challenges Facing Multi-Sourcing Strategy
Offshore BPO: Driving Cost-Effectiveness
Offshore Outsourcing of Call Centers
Protectionism
Implications for Offshore BPOs
A Brief Sketch of Major Outsourcing Destinations
India
Philippines
China
Malaysia
Czech Republic
Singapore
Brazil
Canada
Poland
Egypt
Mexico
Innovations in BPO Industry
BPOs Use Predictive Models to Improve Processes
Robotic Digital Work Force Reduces Costs
Evolving Outsourcing Relationships
Consultative BPO
Simpler Processes to Take Customer Contact Flows to New Levels
Flexible and Agile Customer Care Solutions for Unpredictable Issues
Strategic Partners in High Demand

3. MARKET TRENDS
Snapshots of Key Trends Characterizing the BPO Industry
Altering Delivery Models
Small and Mid-Size Companies
An Expanding Clientele
Focus on Business Process Improvement Gains Momentum
`Industry Expertise' Becomes a'Must-Have' for Service Providers
MSM Model to Boost Client-Vendor Relationships
Service Providers to Focus on Data Security
Migration to SaaS and Private Cloud to Gain Momentum
Internet of Things Poised to Drive Gains
Alternate Offshore Locations Challenge Dominance of Traditional Centers
Nearshoring Finds Favor among Businesses
Latin America Emerges as a Global Delivery Location
Continental Europe Opens Up to BPO
New Business Areas Make Gains
Industry-Specific BPO Services Continue to Gain Strength
Advanced Technologies Come to the Aid of BPO Providers
Robotic Automation Makes Inroads in BPO Industry
Impact of RPA on the BPO Sector
Social Media Networking Trend Transforms Business Strategies
Growing Popularity of Cloud Computing
Growing Use of Mobile Based Customer Service Applications
Voice Biometrics
Growing Role in Customer Verification
BPO Providers Warm up to Green Computing
Analytic Outsourcing Registers Strong Growth
Supply Management Outsourcing Market on an Upswing
 Rise of Bundled IT & BPO Deals
BPO: Heading towards Commoditization?
Growing Significance of Value Addition
Platform BPO
A Key Driving Factor
Merchants Opt for Outsourcing to Protect Credit Card Data
Growing Proportion of Non-Linear Revenues
The Importance of Impact Sourcing
Challenges for Impact Sourcing

4. AN INSIGHT INTO MAJOR HORIZONTAL SEGMENTS
Finance and Accounting BPO (FAO)
Customer Services BPO
Human Resources BPO (HRO)
Recruitment Process Outsourcing (RPO)
HR Outsourcing Types
Procurement BPO
Knowledge Process Outsourcing (KPO)
BPO Vs KPO

5. FINANCE & ACCOUNTING
Overview
Robust Growth across Capital Markets BPO Offers Opportunities for Providers
Competition
Table 2: Leading Players in the Global F&A BPO Market (2014): Percentage Breakdown of Revenues for Accenture, Capgemini, Genpact, IBM and Others (includes corresponding Graph/Chart)

6. CUSTOMER SERVICES BPO
A Prelude
Opportunities from Growing Web-Based Interactions
Contact Center Outsourcing Services Makes Inroads into New Verticals
Service Providers Adopt New Strategies

7. HR BUSINESS PROCESSES OUTSOURCING
A High-Profile Segment
Future Growth Opportunities
Snapshots
Multi-Process HRO Market: An Overview
Payroll BPO Services
Witnesses Broader Adoption
Providers Focus on Consolidation and Cost Optimization
Fulfillment of Objectives and Customer Satisfaction
Providers Target SMB Market
Tax/Legislative Compliance Drives Payroll Outsourcing Demand
HCM Software Records Impressive Gains
Service Providers Focus on Evolved and Dynamic Offerings
Globalization and Standardization of Services and Processes
Popularity of BPaaS Options
Demand for Analytics and Ideation
Understanding Buyers to Fulfill Specific Needs
Note-worthy Trends & Issues
Cost Reduction: Finding Favor Again in Difficult Times
Buyers to Adopt a Tighter Focus
Emergence of Mid-Market
Demand for Newer & Innovative Platforms
Trend towards Process Convergence
Transformation to Services TCO
Focus on Short-term Deals
Fewer Processes in Multi-process HRO Deals
Best-of-the-Breed Concept Gains Strength
Multi-Country Presence of Vendors
Talent Acquisition and Retention: Important Tasks
Rising Significance of Analytics
HR Portal: A Highlighting Trend
Migration to the Cloud
Self-Service: An Option for Mobile Workforce

8. KNOWLEDGE PROCESS OUTSOURCING
Knowledge-Intensive Companies Foster Demand for KPO Services
India: The Leader in KPO Marketplace
BPO Providers Look to Extend Presence into KPO Sector
Shift Towards Value Creation
The Only Way Out
Supplier Glut Imminent
Future Looks Bright for Analytics Outsourcing Market

9. PROCUREMENT BPO
Introduction
Robust Growth Ahead for Procurement BPO
Key Demand Generators
Major Factors Driving Companies to Seek Procurement Outsourcing
Growing Significance of Procurement Function
Future Opportunities: An Increasingly Strategic Role for PO
Clients Look for New Business Models
Relevance of Procurement Outsourcing for Large Businesses
Challenges Confronting PO Vendors
Leading Players
Competition Heats Up in Procurement BPO Market
Logistics BPO

10. COMPETITIVE LANDSCAPE
BPO Industry: Competitive Scenario
Consolidation Activity Intensifies
Genpact Remains at Forefront of Advanced Banking BPO Services
Service Providers Focus on Innovative Offerings to Move up Value Chain
SmartLeap™ Platform from Sutherland
SYKES Insight Analytics from SYKES
Virtual Briefing Center from Teleperformance
Select BPO Mergers & Acquisitions Activity
Presence of Top 10 BPO Service Providers in Various Market Segments (2014)

11. REVIEW OF SELECT END-USE MARKETS
Manufacturing Sector
Telecommunications Industry
Retail Sector
Banking, Insurance & Finance Services
Bookkeeping
Budgeting
Credit Card Processing
Financial Reporting
Financial Statements
General Ledger Maintenance
Bank Reconciliation Statement
Financial Analysis
Preparation of Tax Returns
Mortgage Processing Services
Banking Sector
Business Case for Outsourcing in Banking Sector
Insurance
A Prelude
P&C Insurance BPO Providers Focus on Value-Added Services
Industry on the Recovery Mod
Travel & Transportation Industry
Travel Services
Airline Industry
Review of Airline BPO Services Sector
Logistics and Transportation
Healthcare BPO Market
Government BPO
Construction

12. SERVICE OVERVIEW
Introduction
Vertical Vs Horizontal BPO
Vertical BPO
Horizontal BPO
Onsite, Offsite and Offshore BPO Models
Onsite Business Process Outsourcing
Offsite Business Process Outsourcing
Offshore Business Process Outsourcing
BPO Business Models
Types of BPO Structures
Common Services Offered by BPO Providers
Customer Support Services
Technical Support Services
Employee IT Help-desk Services
Telemarketing Services
Insurance Processing
Data Conversion Services
Data Entry Services
Planning for BPO
Why Outsource to Third World Countries?
The BPO Advantage
How is BPO Different from ASP?
Platform BPO
Platform BPO Vs Traditional BPO
Advantages of Platform BPO
Challenges Facing Platform BPO
Insights into Buyer and Supplier Aspects of BPO Services Market
Supplier Focus on Innovative Offerings and Partnerships
Procurement Concerns

13. SERVICE LAUNCHES
KMC Solutions Launches US Operations
Avaloq Launches BPO Center in Singapore
Wipro Plans Transaction Processing BPO Services in India
CGS Expands in Israel with Launch of New Office
Visionet Unveils Automated Pay-Off Request Processing System
Golden Gate BPO Establishes New Multi-Channel Contact Centre
Avaloq Introduces Business Process Outsourcing Services
Tata Consultancy Services, GE and Saudi Aramco Join Hands to Launch BPO in Saudi Arabia

14. RECENT INDUSTRY ACTIVITY
CSC and HPE Enterprise Services Merge to Form DXC Technology
Aon to Sell Benefits Administration and HR BPO Platform to Blackstone
NTT DATA Acquires Dell Services
Longreach Group Acquires Olympus Corp’s Nippon Outsourcing Corporation
SYNNEX Acquires Minacs Group and Integrates in Concentrix Business Segment
CSC Acquires Xchanging, Provider of Technology-Enabled Business Solutions
Firstsource Group Signs Definitive Agreement to Acquire BPO Division of ISGN
Carlyle Group Acquires Majority Stake in Digitex
Accenture F&A BPO Agreement with Schlumberger Gets Five Year Extension
Infosys McCamish Systems and M Financial Group Announce Ten Year Extension of BPO Contract
Accenture and RSA Extend BPO Agreement for Insurance Services until 2021
Xerox Spins off Business Services Division to Form Conduent
Blackstone Group Acquires India BPO Operation of Serco Group
ExlService Takes Over RPM Direct
Telamon Takes Over Rizzo Consulting
Cognizant Acquires CNO Financial Group’s India-based Operations
MiraMed Global Acquires On Call Consulting
e-Nxt Financials Merges with Tata BSS
Canon Italia to Acquire Integra Document Management
Alorica to Acquire West Corporation’s Agent Services Business
Hinduja Global Services (HGS) to Acquire Majority Stake in Mphasis’ India Business
Accenture Signs Five-Year Contract Extension Agreement with Deutsche Bank for Procurement BPO Services
Capgemini Extends Relationship with Trintech
Accenture Signs Five-Year BPO Contract with TNT
Infosys BPO and AkzoNobel Extend Partnership Agreement
Infosys BPO and a.s.r. Partner for Pensions Back-Office Administration
Infosys BPO Collaborates with PRIDCO to Launch New Center in Puerto Rico
Arvato Inks Deal with Telefonica
MBA Fakhro Forms Voyager IT Solutions
Expert Global Solutions Undertakes Expansion Plans
Spoken Communications Enters Into Technological Partnership with Startek
Visionet Systems Implements FREEMAN ONLINE®
SunGard Inks Deal with InCore Bank
Ubiquity Global Enters into Service Agreement with Wave Crest
Accenture Extends Agreement with Enbridge Gas Distribution
Serco Divests Offshore Private Sector BPO Operations
Owner Resource Divests Gila
CapMan Sells Symbio Stake to VXI Global
Webhelp Acquires FDI
Cinven Acquires Visma
Convergys Acquires Stream
SYNNEX Acquires Customer Care Services Business of IBM
OpenText Acquires GXS
Concentrix Concludes Second Phase of Acquisition of IBM’s Customer Care and Industry Process Services Business
Convergys Takes Over Stream
SPI Global Acquires Bachieve International
Arvato Acquires Stok UK
Vitruvian Acquires Stake in ASP4all Bitbrains
Acquire BPO Takes Over Shore Solutions
ADP Spins Off Dealer Services Business
HOV Services Divests Stake in SourceHOV Holdings
R Systems Divests Stake

15. FOCUS ON SELECT GLOBAL PLAYERS
Accenture Plc (Ireland)
Aon Hewitt (US)
Automatic Data Processing, Inc. (US)
Capgemini (France)
Capita Plc (UK)
Ceridian HCM, Inc. (US)
CGI Group, Inc. (Canada)
Cognizant Technology Solutions Corporation (US)
Computer Sciences Corporation (US)
EXLService Holdings, Inc. (US)

RESEARCH AND MARKETS
16. GLOBAL MARKET PERSPECTIVE

Table 3: World Recent Past, Current and Future Analysis for Business Process Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 4: World Historic Review for Business Process Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 5: World 14-Year Perspective for Business Process Outsourcing by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 6: World Recent Past, Current and Future Analysis for Finance & Accounting Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 7: World Historic Review for Finance & Accounting Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 8: World 14-Year Perspective for Finance & Accounting Outsourcing by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 9: World Recent Past, Current and Future Analysis for Customer Services Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 10: World Historic Review for Customer Services Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 11: World 14-Year Perspective for Customer Services Outsourcing by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 12: World Recent Past, Current and Future Analysis for HR Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 13: World Historic Review for HR Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 14: World 14-Year Perspective for HR Outsourcing by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin
America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 15: World Recent Past, Current and Future Analysis for KPO by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 16: World Historic Review for KPO by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 17: World 14-Year Perspective for KPO by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 18: World Recent Past, Current and Future Analysis for Procurement Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 19: World Historic Review for Procurement Outsourcing by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 20: World 14-Year Perspective for Procurement Outsourcing by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 21: World Recent Past, Current and Future Analysis for Business Process Outsourcing in Manufacturing Industry by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 22: World Historic Review for Business Process Outsourcing in Manufacturing Industry by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 23: World 14-Year Perspective for Business Process Outsourcing in Manufacturing Industry by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 24: World Recent Past, Current and Future Analysis for Business Process Outsourcing in Telecommunications & Technology Industry by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 25: World Historic Review for Business Process Outsourcing in Telecommunications & Technology Industry by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 26: World 14-Year Perspective for Business Process Outsourcing in Telecommunications & Technology Industry by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 27: World Recent Past, Current and Future Analysis for Business Process Outsourcing in Banking, Insurance & Finance Services Industry by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 28: World Historic Review for Business Process Outsourcing in Banking, Insurance & Finance Services Industry by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets
Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 29: World 14-Year Perspective for Business Process Outsourcing in Banking, Insurance & Finance Services Industry by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 30: World Recent Past, Current and Future Analysis for Business Process Outsourcing in Retail Industry by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 31: World Historic Review for Business Process Outsourcing in Retail Industry by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 32: World 14-Year Perspective for Business Process Outsourcing in Retail Industry by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 33: World Recent Past, Current and Future Analysis for Business Process Outsourcing in Other End-Use Sectors by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 34: World 14-Year Perspective for Business Process Outsourcing in Other End-Use Sectors by Geographic Region
Percentage Breakdown of Spending for US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 35: World Historic Review for Business Process Outsourcing in Other End-Use Sectors by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific (excluding Japan), Latin America and Rest of World Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 36: US Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 37: US Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 38: US 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

III. MARKET

1. THE UNITED STATES
A. Market Analysis
   Outlook
   Nearshore Strategy Gains Strength
   Domestic Politics Impact on BPO Sector
   Impact of Protectionist Policies
   Shift Away from Cost Containment Outsourcing Strategy
   HR Outsourcing
   A Highly Lucrative Segment
   The Offshoring Advantage
   Indian BPOs Set Up Onshore Service Centers in US
   Offshoring Challenges
   Procurement BPO Market
   Bank Outsourcing Market
   Residential Mortgage Outsourcing Market
   Affordable Care Act Invigorates Healthcare Payer BPO
   Win-Win for US Outsourcing Companies
   Service Launches
   Strategic Corporate Developments
   Key Players
B. Market Analytics
   Table 36: US Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
   Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
   Table 37: US Historic Review for Business Process Outsourcing by Horizontal Segment
   Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
   Table 38: US 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 39: US Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 40: US Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 41: US 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

2. CANADA
A. Market Analysis
Outlook
HR Outsourcing: On an Upswing
Strategic Corporate Developments
Key Player
B. Market Analytics
Table 42: Canadian Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 43: Canadian Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 44: Canadian 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 45: Canadian Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 46: Canadian Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 47: Canadian 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

3. JAPAN
A. Market Analysis
Current & Future Analysis
Strategic Corporate Development
B. Market Analytics
Table 48: Japanese Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 49: Japanese Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 50: Japanese 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 51: Japanese Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 52: Japanese Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 53: Japanese 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

4. EUROPE
A. Market Analysis
Current and Future Analysis
Outlook
Trends and Opportunities in the European Outsourcing Market
Cloud Computing
Wide Opportunities in Business Processes and Software as a Service
Big Data Revolution to Streamline Operations
Demand for Data Collection Tools and Services
Increasing Demand for Development of Mobile Applications
Demand for Tailor-made Enterprise Apps
Growing Demand for Social Media Services
Rise of Internet of Things (IoT)
The Industrial Internet of Things
Industry 4.0
Wide Availability of Augmented Reality (AR) and Virtual Reality (VR)
Graphic Design Services Outsourcing
Outsourcing Driven by Shortage of Adequate IT Skills
Need for Added Value
Impact of Geopolitical Instability on Outsourcing Services

B. Market Analytics
Table 54: European Recent Past, Current and Future Analysis for Business Process Outsourcing by Geographic Region
France, Germany, Italy, UK, Spain, Russia and Rest of Europe Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 55: European Historic Review for Business Process Outsourcing by Geographic Region
France, Germany, Italy, UK, Spain, Russia and Rest of Europe Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 56: European 14-Year Perspective for Business Process Outsourcing by Geographic Region
Percentage Breakdown of Spending for France, Germany, Italy, UK, Spain, Russia and Rest of Europe Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 57: European Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 58: European Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 59: European 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 60: European Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 61: European Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 62: European 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

4a. FRANCE
A. Market Analysis
Outlook
Strategic Corporate Development
Key Players
B. Market Analytics
Table 63: French Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 64: French Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 65: French 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 66: French Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 67: French Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 68: French 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

4b. GERMANY
A. Market Analysis
Outlook
A Leading European BPO Market
Advantages of Germany as an outsourcing location
Strategic Corporate Development
B. Market Analytics
Table 69: German Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 70: German Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 71: German 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 72: German Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 73: German Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 74: German 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes...
4c. ITALY
A. Market Analysis
Outlook
Financial Services Outsourcing in Italy: An Overview
Strategic Corporate Development
B. Market Analytics
Table 75: Italian Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 76: Italian Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 77: Italian 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 78: Italian Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 79: Italian Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 80: Italian 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

4d. THE UNITED KINGDOM
A. Market Analysis
Outlook
A Quick Primer
Uncertainty Surrounding Brexit Driving Growth of Outsourcing Market
UK Outsourcing Companies Move Overseas
Competitive Landscape
Table 81: Leading Players in UK BPO Services Market (2015): Percentage Breakdown of Market Share for Accenture, Atos, Capita, Serco, Xerox and Others (includes corresponding Graph/Chart)
Service Launch
Strategic Corporate Developments
Key Players
B. Market Analytics
Table 82: UK Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 83: UK Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 84: UK 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 85: UK Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 86: UK Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 87: UK 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

4e. SPAIN
A. Market Analysis
   Current & Future Analysis
   Strategic Corporate Development
B. Market Analytics
Table 88: Spanish Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 89: Spanish Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 90: Spanish 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 91: Spanish Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 92: Spanish Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 93: Spanish 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

4f. RUSSIA
Market Analysis
Table 94: Russian Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 95: Russian Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 96: Russian 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 97: Russian Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 98: Russian Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 99: Russian 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

4g. REST OF EUROPE
A. Market Analysis
   Outlook
Eastern and Central Europe
Czech Republic
Lithuania
Poland
Poland's BPO Remains Unfazed by Political Factors
Romania
Multilingual Romania Remains a Favorite BPO Destination
Focus on Nordic Region Outsourcing Market
A Complementary Review
Companies Constantly Focus on Operational Cost Reduction
Human Capital Posing Immense Challenge
Accessing Global Talent Base Critical to address Nordic's Talents Shortage and Talent Management Challenges
Disruptive and Cloud Technologies
Strategic Corporate Developments
Key Players
B. Market Analytics
Table 100: Rest of Europe Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 101: Rest of Europe Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 102: Rest of Europe 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 103: Rest of Europe Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 104: Rest of Europe Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 105: Rest of Europe 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

5. ASIA-PACIFIC
A. Market Analysis
Outlook
Asia-Pacific Market for BPO: A Primer
HR Outsourcing to Expand
Growing Prospects in SMB Segment
Disadvantages of BPO Phenomenon to Host and Target Countries
India
A Key Global Destination for Outsourcing
Philippines
One of Asia's Premier Outsourcing Destinations
B. Market Analytics
Table 106: Asia-Pacific Recent Past, Current and Future Analysis for Business Process Outsourcing by Geographic Region
Australia, China, India and Rest of Asia-Pacific Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 107: Asia-Pacific Historic Review for Business Process Outsourcing by Geographic Region
Australia, China, India and Rest of Asia-Pacific Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 108: Asia-Pacific 14-Year Perspective for Business Process Outsourcing by Geographic Region
Percentage Breakdown of Spending for Australia, China, India and Rest of Asia-Pacific Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 109: Asia-Pacific Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 110: Asia-Pacific Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 111: Asia-Pacific 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 112: Asia-Pacific Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 113: Asia-Pacific Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 114: Asia-Pacific 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

5a. AUSTRALIA
A. Market Analysis
Current & Future Analysis
Market Overview
B. Market Analytics
Table 115: Australian Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 116: Australian Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 117: Australian 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 118: Australian Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 119: Australian Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 120: Australian 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

5b. CHINA
A. Market Analysis
Market Overview
Emphasis on Developing Domestic Chinese Outsourcing Market
Outsourcing of Back Office Functions
HR Outsourcing in China
Strategic Corporate Development
B. Market Analytics
Table 121: Chinese Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 122: Chinese Historic Review for Business Process Outsourcing by Horizontal Segment

Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 123: Chinese 14-Year Perspective for Business Process Outsourcing by Horizontal Segment

Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

Table 124: Chinese Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector

Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 125: Chinese Historic Review for Business Process Outsourcing by End-Use Sector

Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 126: Chinese 14-Year Perspective for Business Process Outsourcing by End-Use Sector

Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

5c. INDIA

A. Market Analysis

Current & Future Analysis
India's Formidable BPO Industry Leads the Way
BPO Sector Exhibiting Robust Growth
BPO Industry Focuses on Inorganic Growth Strategy
The Changing Role of Indian BPOs
Role of Captive BPOs
Financial Services Market
A Vital BPO Vertical
Human Resource Outsourcing in India
Rural BPO Concept Strengthens
SMEs: Potential for Growth
Focus Shifts to Smaller Towns and Cities
BPO Industry to Unlock the IT Potential of North East India
Tier-II and Tier III Cities to Gain Prominence
New Low Cost Destinations
A Growing Threat!
KPO Industry Gains Efficiency
Emerging Competition Fails to Affect India's Dominance
Global KPO Market by Segment
India Vs Other Offshore Destinations
Valuation Advisory/Services: A New Area of Opportunity for KPOs
Reverse Outsourcing: New Trend in Outsourcing
Future Prospects
Challenges Confronting Indian BPO Industry
Threat from Alternative Destinations
Diminishing Cost Advantages
Attrition
The Bane of Indian BPO Sector
Lack of Employability: A Cause of Concern
Talent Shortage Drives BPOs towards Global Delivery Model
The Dampeners
The Infosys Visa Fraud Case Vs Indian IT and BPO Sector
Standard Chartered and HSBC Scandals: An Eye-Opener
BPO Vendor Landscape in India
India Centric BPO Providers
Breakdown by Vertical Industry
India-Centric BPO Providers: Breakdown by Product/Service Offerings
Service Launch
Strategic Corporate Developments
Key Players

B. Market Analytics

Table 127: Indian Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 128: Indian Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 129: Indian 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 130: Indian Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 131: Indian Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 132: Indian 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

5d. REST OF ASIA-PACIFIC

A. Market Analysis
Current & Future Analysis
Philippines
Forges Ahead as Favorable Destination for BPO Sector
Table 133: Philippines BPO Industry (2016): Percentage Breakdown of Export Revenue by Destination (includes corresponding Graph/Chart)
Table 134: Philippines BPO Industry (2016): Percentage Breakdown of Export Revenue by Sector (includes corresponding Graph/Chart)
Growth Drivers
Leading BPO Companies in the Philippines
Key Factors Responsible for Philippines’ Success in BPO Sector
Command over Language and Influence of Western Culture
Developed Infrastructure
Government Support
Demand for Value-Added Services Drives Development of KPO
Table 135: Philippines BPO Market (2016): Percentage Breakdown of Revenues by Segment/Type of Service Offerings
Animation, Contact Center, Software Development, Transcription and Others (includes corresponding Graph/Chart)
Challenges for the BPO Industry
High Attrition Rate
High Focus on Voice Services
Changing Regulations
Next Wave Cities to Spur Growth
Outlook
Malaysia
Singapore
Thailand
Sri Lanka: An Emerging BPO Destination
Vietnam to Succeed Japan in F&A Outsourcing Services
Service Launches
Strategic Corporate Developments
B. Market Analytics
Table 136: Rest of Asia-Pacific Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with
Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 137: Rest of Asia-Pacific Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 138: Rest of Asia-Pacific 14-Year Perspective for Business Process Outsourcing by Horizontal Segment Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 139: Rest of Asia-Pacific Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 140: Rest of Asia-Pacific Historic Review for Business Process Outsourcing by End-Use Sector Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 141: Rest of Asia-Pacific 14-Year Perspective for Business Process Outsourcing by End-Use Sector Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

6. LATIN AMERICA
A. Market Analysis
Outlook
Latin America as a Global Delivery Location
Market Snapshots
BPO Industry Shift Up the Value Chain
B. Market Analytics
Table 142: Latin American Recent Past, Current and Future Analysis for Business Process Outsourcing by Geographic Region
Brazil and Rest of Latin America Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 143: Latin American Historic Review for Business Process Outsourcing by Geographic Region
Brazil and Rest of Latin America Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 144: Latin American 14-Year Perspective for Business Process Outsourcing by Geographic Region Percentage Breakdown of Spending for Brazil and Rest of Latin America Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 145: Latin American Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 146: Latin American Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 147: Latin American 14-Year Perspective for Business Process Outsourcing by Horizontal Segment Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 148: Latin American Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 149: Latin American Historic Review for Business Process Outsourcing by End-Use Sector Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 150: Latin American 14-Year Perspective for Business Process Outsourcing by End-Use Sector Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

6a. BRAZIL
A. Market Analysis
Current & Future Analysis
Increasing Demand for Contact Center Outsourcing
B. Market Analytics
Table 151: Brazilian Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 152: Brazilian Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 153: Brazilian 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 154: Brazilian Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 155: Brazilian Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 156: Brazilian 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

6b. REST OF LATIN AMERICA
A. Market Analysis
Current & Future Analysis
Argentina
Chile
Colombia
Costa Rica
A Foreign Investment Hub
Mexico
Peru Drives Demand for Software Outsourcing Professionals
Uruguay
B. Market Analytics
Table 157: Rest of Latin America Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 158: Rest of Latin America Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 159: Rest of Latin America 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 160: Rest of Latin America Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 161: Rest of Latin America Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 162: Rest of Latin America 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes
7. REST OF WORLD
A. Market Analysis
Outlook
Israel
Africa
Egypt: An Emerging Market
Kenyan BPO Sector
Challenges and Developments
South Africa
Market Overview
South Africa Emerges as a Major Offshoring Market
Outlook
Telecom Industry Deregulation
A Major Step Towards Rapid BPO Market Growth
South Africa Gains as Global Companies Look to Minimize Risks
Tanzania: An Emerging Outsourcing Destination in East Africa
Service Launches
Strategic Corporate Developments
B. Market Analytics
Table 163: Rest of World Recent Past, Current and Future Analysis for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 164: Rest of World Historic Review for Business Process Outsourcing by Horizontal Segment
Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 165: Rest of World 14-Year Perspective for Business Process Outsourcing by Horizontal Segment
Percentage Breakdown of Spending for Finance & Accounting, Customer Services, HR, KPO, and Procurement Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)
Table 166: Rest of World Recent Past, Current and Future Analysis for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 167: Rest of World Historic Review for Business Process Outsourcing by End-Use Sector
Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets Independently Analyzed with Annual Spending Figures in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 168: Rest of World 14-Year Perspective for Business Process Outsourcing by End-Use Sector
Percentage Breakdown of Spending for Manufacturing, Telecommunications & Technology, Banking, Insurance & Finance Services, Retail, and Other Markets for Years 2009, 2016 and 2022 (includes corresponding Graph/Chart)

IV. COMPETITIVE LANDSCAPE
Total Companies Profiled: 221 (including Divisions/Subsidiaries 231)
- The United States (80)
- Canada (6)
- Japan (2)
- Europe (29)
- France (3)
- Germany (3)
- The United Kingdom (13)
- Italy (1)
- Spain (1)
- Rest of Europe (8)
- Asia-Pacific (Excluding Japan) (109)
- Middle East (1)
- Latin America (3)
- Africa (1)

Ordering:

Order Online - [http://www.researchandmarkets.com/reports/347963/](http://www.researchandmarkets.com/reports/347963/)

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

<table>
<thead>
<tr>
<th>Product Name:</th>
<th>Business Process Outsourcing (BPO) - Global Strategic Business Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Address:</td>
<td><a href="http://www.researchandmarkets.com/reports/347963/">http://www.researchandmarkets.com/reports/347963/</a></td>
</tr>
<tr>
<td>Office Code:</td>
<td>SC2GYZGY</td>
</tr>
</tbody>
</table>

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF)</td>
<td>USD 4950</td>
</tr>
<tr>
<td>Single User:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USD 6930</td>
</tr>
<tr>
<td>1 - 5 Users:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USD 9405</td>
</tr>
<tr>
<td>1 - 10 Users:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USD 11880</td>
</tr>
<tr>
<td>1 - 15 Users:</td>
<td></td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

<table>
<thead>
<tr>
<th>Title:</th>
<th>Mr</th>
<th>Mrs</th>
<th>Dr</th>
<th>Miss</th>
<th>Ms</th>
<th>Prof</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Address: *</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organisation:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal / Zip Code:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Number:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax Number:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ________________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World