

BPO (Business Process Outsourcing) Market in Japan: Key Research Findings 2014

◆ Research Outline

Yano Research Institute has conducted a study on the domestic BPO (Business Process Outsourcing) market in Japan with the following conditions:

1. Research period: July to October, 2014
2. Research target: BPO market players including, Siers, companies operating call centers, printing, manpower dispatching, consulting, and etc., BPO businesses in the field of human resources, accounting, medical, offshore, purchase/procurement, social media, etc.
3. Research methodologies: Face-to-face interviews by the specialized researchers, interviews via telephone/emails, and literature research

What is BPO?

BPO in this research indicates contracted services to do inner-office tasks of contractor companies. Those tasks include: System operation/management, call center jobs (contact centers, help desks, and fulfillment), back-office jobs (HR, welfare, general affairs, and accounting), and direct departmental jobs (purchasing/procurement, sales, simple tasks at core sections, and tasks unique to each industry).

What are BPO for IT and BPO for non-IT?

BPO for IT in this research indicates system operation/management among various BPO tasks. All the other BPO tasks are defined as BPO for non-IT jobs.

◆ Key Findings

■ **CAGR of BPO Market from FY2012 to FY2018 Projected to Achieve 2.9%**

CAGR (Compound Annual Growth Rate) of entire BPO market, including both IT and non-IT, from FY2012 to FY2018 is likely to attain 2.9 %. The prospective market size is to achieve 4,020.6 billion yen by FY2018, based on the turnover of businesses.

■ **Non-IT BPO Can be Boosted by Labor Shortage, Launch of My Number System, and Tokyo Olympic Games**

CAGR of BPO market size for non-IT jobs from FY2012 to FY2018 is expected to achieve 1.2%, the market size for FY2018 is likely to attain 1,661.3 billion yen by FY2018, based on the turnover of businesses.

Since shortfall of human resources is expected in FY2014 and beyond, BPO services are likely to be used as external resources by increasing number of companies. In addition, BPO may contribute as external resources to, for instance, office work that has to do with My Number System or new business derived from Tokyo Olympic Games.

■ **Human Resources Shortage May Bring About Expansion for BPO Market for IT**

CAGR of BPO market size for IT from FY2012 to FY2018 is likely to attain 4.2 %. The prospective market size is to achieve 2,359.3 billion yen by FY2018, based on the turnover of

businesses.

Due to overall shortage of IT engineers, number of companies proactive in using IT outsourcing services seems to be increasing. Therefore, more than a certain level of expansion can be expected for BPO market for IT.

◆ **Report format:**

Published report: “BPO (Business Process Outsourcing) Industry 2014”

Issued on: November 7, 2014

Language: Japanese

Format: 612 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

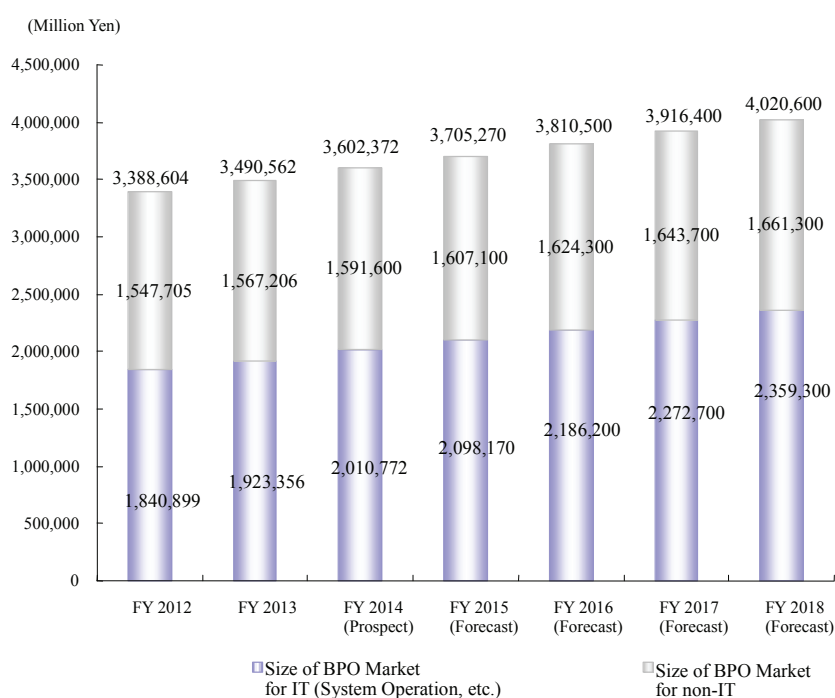
Contacts: Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure 1: Transition and Forecast of BPO (Business Process Outsourcing) Market Size**



Notes:

1. The figures are based on the turnover of businesses.
2. The figures have been recalculated retrospectively.
3. BPO in this research indicates contracted services to do inner-office tasks of contractor companies. Those tasks include: System operation/management, call center jobs (contact centers, help desks, and fulfillment), back-office jobs (HR, welfare, general affairs, and accounting), and direct departmental jobs (purchasing/procurement, sales, simple tasks at core sections, and tasks unique to each industry). However, those specialized corporate services that are ordinarily and traditionally outsourced, such as tax affairs, logistics, information system development, and building maintenance, are excluded from this survey.
4. BPO for IT in this research indicates system operation/management among various BPO tasks. All the other tasks are defined as BPO for non-IT.