



Topic: Recruitment Process Outsourcing (RPO) – Rise of RPO in Asia Pacific

Recruitment Process Outsourcing (RPO)
Market Report: December 2013 – Preview Deck

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Background and methodology of the research

Background of the research

Recruitment Process Outsourcing (RPO) is one of the fastest growing single-process HRO markets. RPO in Asia Pacific is growing at a rate that is noticeably higher than seen in other regions. It has also seen very strong growth in new deal activity in the last few years. Many deals covering Asia Pacific are multi-country in nature and, as a result, numerous global service providers enjoy a high market share in the region. Asia Pacific is a highly heterogeneous market with different regions displaying distinct characteristics. Buyers have diverse mindsets and service providers need to streamline their offerings accordingly.

In this research, we analyze the RPO market in Asia Pacific across various dimensions

- Market overview
- Buyer adoption and solution trends
- Country focus and leading service providers

The scope of analyses includes

- RPO deals that include a minimum of four or more recruitment processes
- The RPO deal is active and is at least one year in contract length
- The deal scope should not be limited to temporary hires only
- All geographies, industries, and job families

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Everest Group's RPO research is based on three key sources of proprietary information

- 1 Everest Group's proprietary database of over **900 RPO deals** (updated annually)
 - The database tracks the following elements of each RPO deal:
 - Buyer details: Including industry, location, and signing region
 - Deal details: Including ACV, term, start date, hires managed, primary pricing structure, process coverage, and geographic coverage (at country-level)
 - Technology ownership and maintenance
 - Global sourcing

- 2 Everest Group's proprietary database of **operational capability of 25 RPO service providers** (updated annually)
 - The database tracks the following capability elements for each service provider:
 - RPO clients, RPO revenue, RPO service suite, and RPO employees
 - Recent RPO-related developments (investments and partnerships)
 - RPO clients split by geography, industry, scope, and buyer size
 - RPO hires split by geography, source of hires, and type of hires
 - RPO delivery locations and level of offshoring

- 3 Ongoing buyer surveys and interactions
 - Everest Group's **executive interview and data collection** from **around 60 RPO buyers**
 - The data contains the following detailed buyer perspective about the RPO deals:
 - ◆ Drivers for adopting RPO and buyer-provider relationships
 - ◆ The level of buyer satisfaction and the underlying reasons

Service providers covered in detail in the analyses



The analyses in this report are presented at two levels:

- The overall market analysis that highlights the overall market composition/dynamics
 - The current market trends based on deal activities in the last five years
- The sample size varies for different analyses based on the deal detail availability

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected is only presented back to the industry in an aggregated fashion

Overview and abbreviated summary of key messages

This report will assist key stakeholders (buyers, service providers, and technology providers) understand the changing dynamics of the RPO market in Asia Pacific and help them identify the key industry trends. In this backdrop, this report provides comprehensive coverage of the Asia Pacific market including market overview, buyer adoption and solution trends, and country-specific characteristics and leading service providers.

Some of the findings in this report, among others, are:

Market overview

- RPO in Asia Pacific is growing at a rate that is noticeably higher than seen in other regions. It is growing on the back of a steep growth in new deal signings over the last few years
- While adoption of value-added services is still low in Asia Pacific, it is showing signs of “leapfrogging” to include elements such as analytics (to reduce early hire attrition)

Buyer adoption and solution trends

- Buyer adoption and solution trends can be described around four key dimensions – geographic scope, blended RPO adoption, industry adoption, and process scope

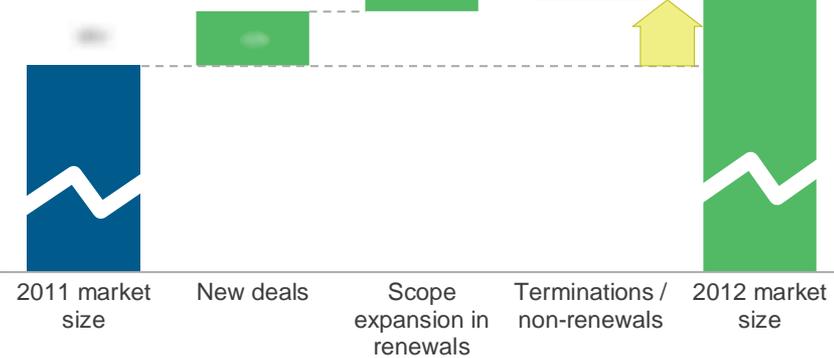
Country focus and leading service providers

- The Asia Pacific RPO market is heterogeneous and displays varying characteristics across two regions – developed markets (such as ANZ, Hong Kong, and Singapore) and emerging markets (such as India and China)

Below are four charts to illustrate the depth of the report

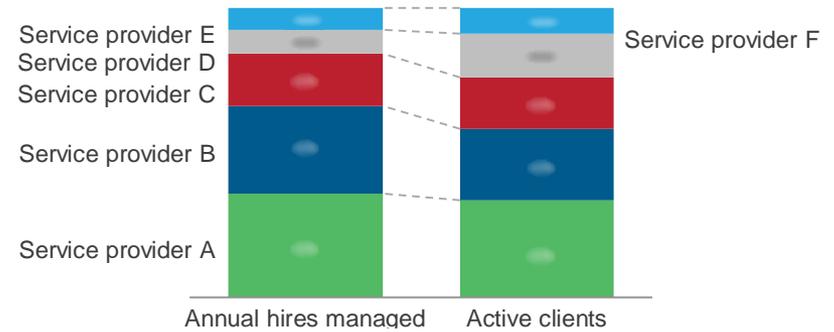
Market size of RPO in Asia Pacific

RPO market size 2011-2012
US\$ billion



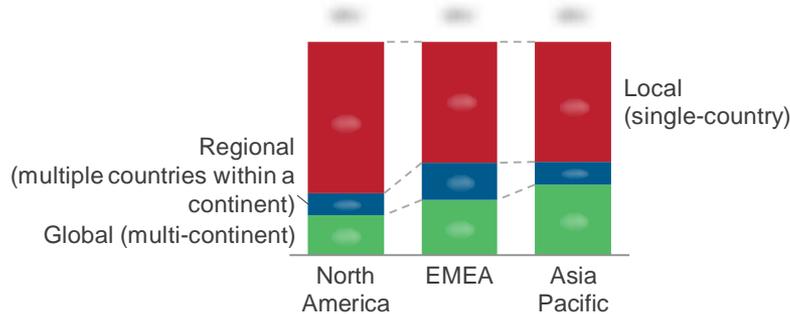
Service provider market share distribution

Service provider share distribution in Asia Pacific
Annual number of hires and active clients

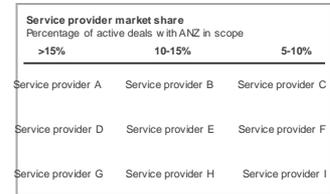
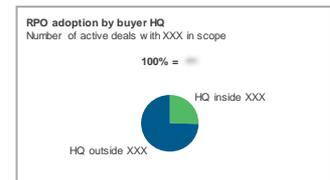
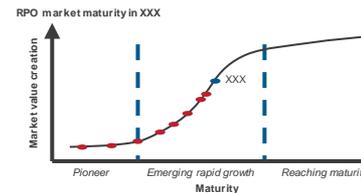


Buyer adoption and solution trends

Geographic scope of deals involving each region
Number of new deals



Country focus and leading service providers



Source: Everest Group (2013)

RPO research calendar

Published Current

Topic	Release date
RPO Annual Report 2013 – Dichotomy of Market Exuberance and Subdued Economy	February-2013
RPO – Service Provider Landscape with PEAK Matrix Assessment 2013	April-2013
Pinstripe Merges with Ochre House – Demise of Partnership-based RPO Model	July-2013
Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2013	August-2013
Managed Service Provider (MSP) – Mastering the Winds of Change	October-2013
Analytics Business Process Services (BPS) – Deciphering the Analytics Code	November-2013
Recruitment Process Outsourcing (RPO) – Rise of RPO in Asia Pacific	December-2013
Sourcing Contingent Workforce – Rise of MSP model – Service provider landscape	Q4-2013
Recruitment Process Outsourcing (RPO) – Annual Report 2014	Q1-2014

Additional RPO research recommendations

The following documents are recommended for additional insight into the topic covered in this research. The recommended documents either provide additional details on the topic or complementary content that may be of interest

1. **Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix Assessment 2013** ([EGR-2013-3-R-0860](#)); 2013. This report provides a comprehensive analysis of the RPO service provider landscape along multiple dimensions and assesses service providers to position them on the Everest Group PEAK Matrix. Each of the 25 RPO service providers analyzed are segmented into Leaders, Major Contenders, and Emerging Players, and Star Performers. Additionally, it provides key insights on the areas in which service providers differentiate themselves
2. **Recruitment Process Outsourcing (RPO) Annual Report 2013 – Dichotomy of Market Exuberance and Subdued Economy** ([EGR-2013-3-R-0850](#)); 2013. This research provides comprehensive coverage of the 2012 RPO market and analyzes it across various dimensions such as market overview, key business drivers, buyer adoption trends, solution and transaction trends, and service provider landscape. Additionally, it includes predictions for market size, buyer adoption, solution & transaction trends, and service provider landscape for the 2013 RPO market
3. **Multi-Country RPO: Unveiling the Service Delivery Model Best Practices** ([EGR-2012-3-R-0722](#)); 2012. Multi-Country RPO (MCRPO) is increasingly being adopted by multinational corporations. However, the outcomes achieved, along with the level of satisfaction among MCRPO buyers, are mixed. The key objectives of this study are to assess variations in MCRPO delivery models and to identify best practices. The study's primary methodology is a set of executive interviews combined with detailed engagement data collection with MCRPO buyers

For more information on this and other researches published by Everest Group, please contact us:

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At a glance

- With a fact-based approach driving outcomes, Everest Group counsels organizations with complex challenges related to the use and delivery of the next generation of global services
- Through its practical consulting, original research, and industry resource services, Everest Group helps clients maximize value from delivery strategies, talent and sourcing models, technologies, and management approaches
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