



Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2017

Recruitment Process Outsourcing (RPO)
Market Report – March 2017 – Preview Deck

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- The full report is included in the following subscription(s)
 - **Recruitment Process Outsourcing (RPO)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**



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* Banking, financial services, and insurance

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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 **2,000 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 22 RPO service providers** (updated annually)
- The database tracks the following capability elements for each service provider:
 - RPO clients, revenue, service suite, and 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 interviews and data collection** from **RPO buyers**
 - The data contains the following detailed buyer perspectives about 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:

- Overall market analysis that highlights the 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.

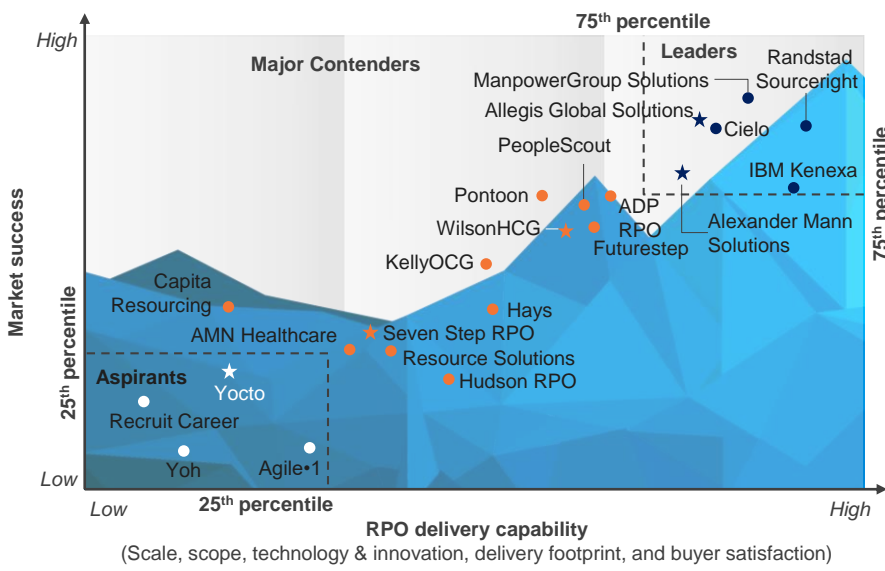
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected, is presented back to the industry only in an aggregated fashion

RPO PEAK Matrix 2017 – summary

- Everest Group's PEAK Matrix categorizes RPO service providers into Leaders, Major Contenders, and Aspirants, based on their market success and overall RPO delivery capability
- Based on Everest Group's 2017 RPO PEAK Matrix, the 22 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** Alexander Mann Solutions, Allegis Global Solutions, Cielo, IBM Kenexa, ManpowerGroup Solutions, and Randstad Sourceright
 - **Major Contenders:** ADP RPO, AMN Healthcare, Capita Resourcing, Futurestep, Hays, Hudson RPO, KellyOCG, PeopleScout, Pontoon Solutions, Resource Solutions, Seven Step RPO, and WilsonHCG
 - **Aspirants:** Agile-1, Recruit Career, Yocto, and Yoh
- Everest Group selected RPO Star Performers based on the relative YOY movement of each service provider on the PEAK Matrix
- The “Star Performer” title relates to the strongest performance in a calendar year and does not reflect the overall market leadership position. Those identified as Star Performers may include Leaders, Major Contenders, or Aspirants
- 2017 RPO market Star Performers are (in alphabetical order):
 - Alexander Mann Solutions
 - Allegis Global Solutions
 - Seven Step RPO
 - WilsonHCG
 - Yocto

This study contains two sections – Everest Group PEAK Matrix and remarks on each of the service providers; below are few snapshots from the report

Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix for RPO



Capability assessment

Legend: Leaders (light blue), Major Contenders (orange), Aspirants (grey).
 Performance levels: Best in Class (dark blue), Very High (medium blue), High (light blue), Medium High (lighter blue), Medium (lightest blue), Medium Low (very light blue), Low (pale blue), Not Matured (white).

Service provider	Delivery capability						Market success
	Scale	Scope	Technology	Delivery footprint	Buyer satisfaction	Overall	
Service provider 1	High	High	High	High	High	High	High
Service provider 2	High	High	High	High	High	High	High
Service provider 3	High	High	High	High	High	High	High
Service provider 4	High	High	High	High	High	High	High
Service provider 5	High	High	High	High	High	High	High
Service provider 6	High	High	High	High	High	High	High

Everest Group explains each service provider's strengths and areas of improvement

Legend: Leaders (light blue), Major Contenders (orange), Aspirants (grey).
 Performance levels: Best in Class (dark blue), Very High (medium blue), High (light blue), Medium High (lighter blue), Medium (lightest blue), Medium Low (very light blue), Low (pale blue), Not Matured (white).

Delivery capability						Market success
Scale	Scope	Technology and innovation	Delivery footprint	Buyer satisfaction	Overall	
High	High	High	High	High	High	High

Strengths

- Strong Global presence as a subsidiary of Manpower Group, one of the world's largest staffing and recruiting organizations, with the advantage of Manpower's 2012, 2013, 2014, 2015, and 2016 awards.
- Strong presence in emerging and developing markets, including India, Brazil, and Africa.
- Strong presence in the United States, with a focus on the Northeast and Midwest regions.
- Strong presence in the United Kingdom, with a focus on the London and South East regions.

Areas of improvement

- Strong Global presence as a subsidiary of Manpower Group, one of the world's largest staffing and recruiting organizations, with the advantage of Manpower's 2012, 2013, 2014, 2015, and 2016 awards.
- Strong presence in emerging and developing markets, including India, Brazil, and Africa.
- Strong presence in the United States, with a focus on the Northeast and Midwest regions.
- Strong presence in the United Kingdom, with a focus on the London and South East regions.

Source: Everest Group (2017)

RPO research calendar

■ Published
 ■ Current

Topic	Release date
Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2016	July 2016
RPO – Service Provider Profile Compendium 2016	October 2016
Recruitment Process Outsourcing – Annual Report 2016	November 2016
Recruitment Process Outsourcing – Service Provider Landscape in Latin America with PEAK Matrix™ Assessment	December 2016
Technology in Recruitment Process Outsourcing - Enabling a Paradigm Shift	December 2016
RPO 3.0	March 2017
Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2017	March 2017
Recruitment Process Outsourcing (RPO) Annual Report 2017	Q2 2017
RPO - Service Provider Profile Compendium 2017	Q2 2017
Cognitive and Automation in Talent Acquisition	Q2 2017
Mega-sized deals in RPO	Q3 2017
RPO Service Provider Landscape in Asia Pacific with PEAK Matrix	Q4 2017

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 or complementary content that may be of interest

1. **Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2016** ([EGR-2016-3-R-1834](#)); 2016. The global RPO market witnessed good traction in 2016 with over 200 new contracts signed. The market in North America showed an uptick as compared to last year and the market in Asia Pacific continued to exhibit strong growth. Last year, especially, saw a lot of M&A (Mergers & Acquisitions) activity in the RPO market. As the market is becoming more competitive, service providers are taking the inorganic route to strengthen their capabilities in different geographies, industries, or recruitment technology
2. **Recruitment Process Outsourcing (RPO) Annual Report 2016 – Opportunities Abound in a Buoyant Market** ([EGR-2016-3-R-1991](#)); 2016. Recruitment Process Outsourcing (RPO) continued its momentum and grew at 17% to touch the US\$2.4 billion mark in annualized spend in 2015. This research provides comprehensive coverage of the market across dimensions such as market overview, key business drivers, buyer adoption trends, solution & transaction trends, and service provider landscape
3. **RPO 3.0 – Paradigm Shift in RPO Value Proposition** ([EGR-2016-3-V-2116](#)); 2016. RPO is transitioning to the next phase of its evolution – RPO 3.0. This will enable organizations to create real strategic impact from RPO in these times of revolutionary transition. This report discusses the global shifts and their impact on the workforce, imperatives for the talent acquisition organization, the emergence of RPO 3.0, how it differs from the earlier generations of RPO, as well as challenges & best practices in realizing RPO 3.0

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

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About Everest Group

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