



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

Recruitment Process Outsourcing (RPO)

Market Report – September 2017: Complimentary Abstract / Table of Contents

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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
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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 17 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



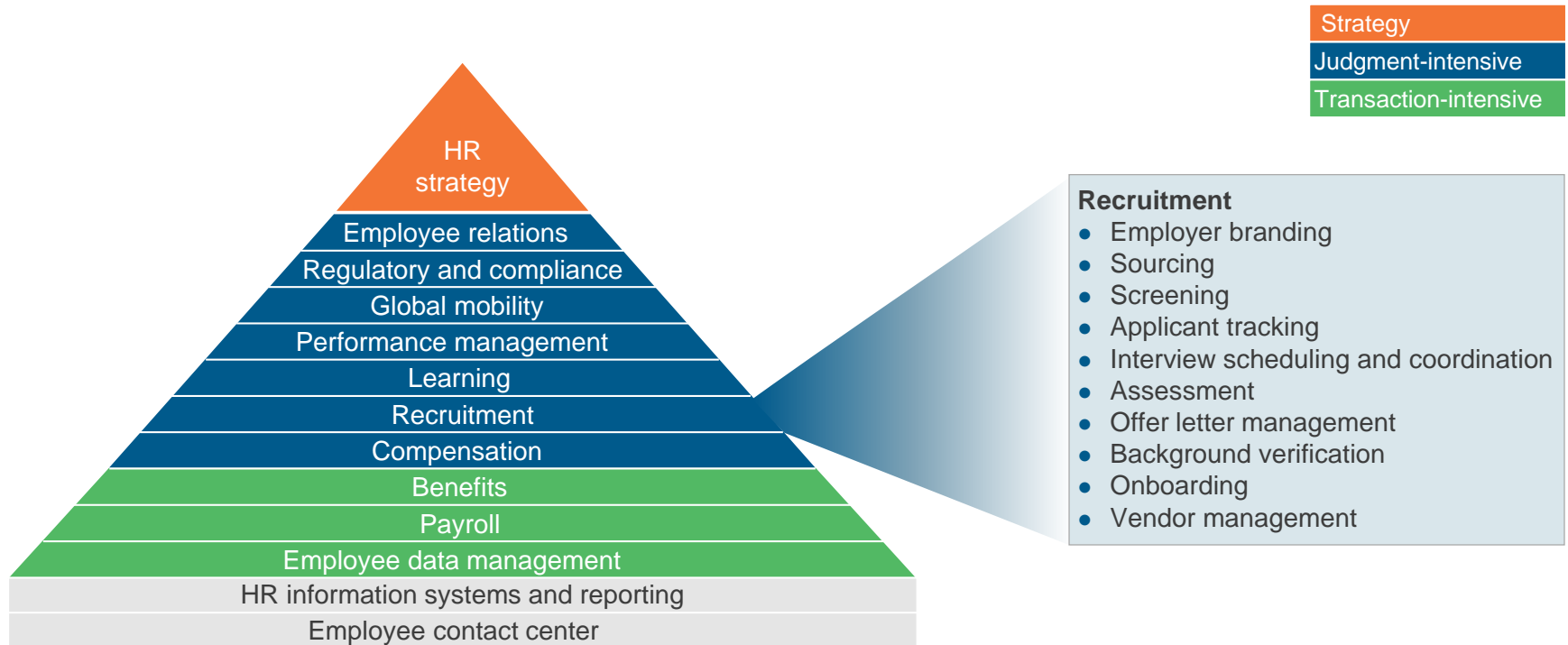
The analyses in this report are presented at two levels:

- 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

We define RPO as a transfer of responsibility of all or part of the recruitment processes or activities on an ongoing basis



For this study, we included RPO deals in which:

- A **minimum of four or more recruitment processes** are included
- The outsourcing deal is active and is **at least one year in deal duration**
- The deal scope should **not be limited to only temporary hires**

This study **does not** include “out-tasking” arrangements (typically handled by recruitment agencies, staffing companies, or executive search firms) that are managed on a project-by-project basis, rather than through an ongoing long-term arrangement.

Overview and abbreviated summary of key messages

This report examines the dynamics of the Recruitment Process Outsourcing (RPO) market in Asia Pacific. It provides a deep-dive analysis of how the service providers shape up in terms of their market success and delivery capability. Based on the comprehensive Everest Group PEAK Matrix, 17 RPO service providers are segmented into Leaders, Major Contenders, and Aspirants. Additionally, this report contains Everest Group's remarks on each service provider's strengths and areas of improvement.

Some of the findings in this report are:

1

RPO PEAK Matrix 2017 for Asia Pacific

- Everest Group's RPO PEAK Matrix 2017 for Asia Pacific categorizes RPO service providers into Leaders, Major Contenders, and Aspirants, based on their market success and RPO delivery capability
- Based on Everest Group's 2017 RPO PEAK Matrix for Asia Pacific, the 17 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** Alexander Mann Solutions, Allegis Global Solutions, ManpowerGroup Solutions, and Randstad Sourceright
 - **Major Contenders:** Career International, Futurestep, Hays Talent Solutions, Hudson RPO, KellyOCG, IBM TA&O, PeopleScout, PeopleStrong, Pontoon, and Resource Solutions
 - **Aspirants:** AgileOne, Recruit Career, and Harrier Human Capital

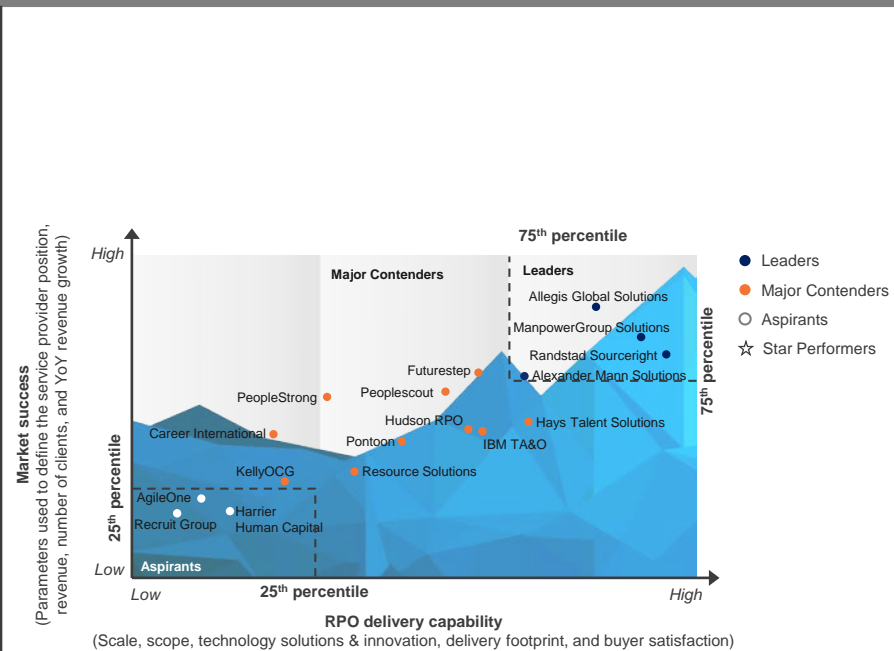
2

RPO service provider commentary

- Everest Group delineates each of the 17 service provider's strengths and areas of improvement
- The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

This study offers three distinct chapters providing a deep dive into key aspects of RPO APAC market; below are three charts to illustrate the depth of the report

Everest Group PEAK Matrix™ for RPO 2017 – Asia Pacific



Capability assessment

Service provider	Delivery capability				Overall	Market success
	Scale	Scope	Technology solutions and innovation	Delivery footprint		
Service Provider 1	🟡	🟡	🟡	🟡	🟡	🟡
Service Provider 2	🟡	🟡	🟡	🟡	🟡	🟡
Service Provider 3	🟡	🟡	🟡	🟡	🟡	🟡
Service Provider 4	🟡	🟡	🟡	🟡	🟡	🟡
Service Provider 5	🟡	🟡	🟡	🟡	🟡	🟡
Service Provider 6	🟡	🟡	🟡	🟡	🟡	🟡

Service provider's strengths and areas of improvement

Delivery capability					Market success
Scale	Scope	Technology and innovation	Delivery footprint	Overall	
🟡	🟡	🟡	🟡	🟡	🟡

Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the region

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning in Asia Pacific
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

Source: Everest Group (2017)

Research calendar – Recruitment Process Outsourcing

Published
 Planned
 Current release

Flagship RPO reports

Release date

Recruitment Process Outsourcing – Annual Report 2016	November 2016
Recruitment Process Outsourcing – Service Provider Landscape in Latin America with PEAK Matrix™ Assessment 2016	December 2016
Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2017	March 2017
Recruitment Process Outsourcing – Service Provider Profile Compendium 2017	May 2017
Recruitment Process Outsourcing – Annual Report 2017	June 2017
"RPO Buyers are Satisfied" – Truth or Myth?	June 2017
Recruitment Process Outsourcing: Service Provider Landscape with PEAK Matrix™ Assessment 2017 – Asia Pacific	September 2017
Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix™ Assessment 2018	Q1 2018
Recruitment Process Outsourcing – Annual Report 2018	Q1 2018

Thematic RPO reports

Release date

Technology in Recruitment Process Outsourcing - Enabling a Paradigm Shift	December 2016
RPO 3.0	March 2017
Patient Care to Talent Care: Optimizing Talent Acquisition in Healthcare through Holistic Talent Management	March 2017
Enterprise Total Talent Acquisition (ETTA) – The Future-Ready Talent Approach	May 2017
Cognitive and Automation in Talent Acquisition	Q4 2017
Mega-sized Deals in RPO	Q4 2017

Note: For a list of all RPO reports published by us, please refer to our [website page](#)

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 2017** ([EGR-2017-3-R-2131](#)); The global RPO market witnessed good traction in 2017 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 2017 – Strategic Value Creation in a Rapidly Evolving Market** ([EGR-2017-3-R-2236](#)); 2017. Recruitment Process Outsourcing (RPO) continued its momentum and grew at 16% to touch the US\$2.8 billion mark in annualized spend in 2016. 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

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empower clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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