



Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018

Recruitment Process Outsourcing (RPO)

Market Report – April 2018: 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

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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 ~2,500 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 21 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 activity 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 examines the dynamics of the Recruitment Process Outsourcing (RPO) market. 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, 21 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, among others, are:

1

RPO PEAK Matrix 2018

- 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 2018 RPO PEAK Matrix, the 21 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** Alexander Mann Solutions, Allegis Global Solutions, Cielo, Futurestep, ManpowerGroup Solutions, and Randstad Sourceright
 - **Major Contenders:** ADP RPO, Hays, Hudson RPO, IBM Talent Acquisition Optimization (IBM TAO), KellyOCG, PeopleScout, Pontoon, Resource Solutions, Sevenstep, WilsonHCG, and Yoh
 - **Aspirants:** AgileOne, AMN Healthcare, Pierpoint, and Recruit Career
 - Everest Group also identified the following providers as Star Performers based on their year-over-year movement on the PEAK Matrix (in alphabetical order): Allegis Global Solutions, Randstad Sourceright, WilsonHCG, and Yoh

2

RPO service provider commentary

- Everest Group delineates each of the 21 service providers' 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 the RPO market; below are four charts to illustrate the depth of the report

Everest Group PEAK Matrix™ for RPO 2018¹



- 1 Assessment for **AgileOne**, **Hudson RPO**, **Resource Solutions**, and **Recruit Career** excludes service provider inputs on this particular study, and is based on Everest Group's estimates which leverages Everest Group's proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage & public disclosures, and interaction with buyers
- 2 Pierpoint was not evaluated as part of the Star Performer analysis due to their first participation in the PEAK Matrix analysis

Capability assessment

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1	●	○	●	●	●	○	●	●	○
Service provider 2	○	○	○	○	○	○	●	○	○
Service provider 3	○	●	○	○	●	○	○	○	○
Service provider 4	○	○	○	○	●	○	○	○	○
Service provider 5	●	●	○	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	●	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	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 world

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- 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

Research calendar – Recruitment Process Outsourcing (RPO)

Published
 Planned
 Current release

Flagship RPO reports

Release date

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 (RPO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018	April 2018
Recruitment Process Outsourcing – Annual Report 2018	Q2 2018

Thematic RPO reports

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
Digital Technologies: The Next Frontier in Talent Acquisition	December 2017
Reimagining Talent Acquisition in a Digital-First Era	March 2018
Digital Startups in Talent Acquisition	Q2 2018

Note: For a list of all of our RPO reports, please visit the [RPO](#) on our reports portal

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 Mergers & Acquisitions (M&A) 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. **Digital Technologies: The Next Frontier in Talent Acquisition** ([EGR-2017-3-V-2457](#)); 2017. The global services industry is undergoing a tremendous change from a receding arbitrage-first to a fast-growing digital-first model. The impact of such a transformation is being felt by every business function; HR and Talent Acquisition (TA) is no exception. The paper reviews evolution and relative maturity of different next-generation technologies – their current and future applications, factors fueling the growth of digital in TA, including the key outcomes of next-generation digital technologies, among others

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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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