

# Contingent Workforce Management (CWM) – Service Provider Landscape with Services PEAK Matrix<sup>®</sup> Assessment 2020

August 2020: Complimentary Abstract / Table of Contents



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  - [Contingent Workforce Management \(CWM\) Services](#)
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- Accelerators™
- Analyst access
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- PriceBook
- Virtual Roundtables
- Workshops

## 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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## Background and methodology of the research

The CWM outsourcing market is one of the fastest growing outsourcing markets in the world today, clocking, yet again, double-digit growth rate in 2019. North America continues to hold the majority share of the market; with Europe, the Middle East and Africa, and Asia Pacific being the emerging markets, also witnessing healthy growth rates. The CWM outsourcing market has almost matured in certain regions, but overall growth has remained high due to an increase in adoption from mid-market and small buyers, as well as from new geographies and industries. This report examines the dynamics of the global CWM outsourcing service provider landscape and its impact on the CWM outsourcing market. It gives an overview of the market and analyzes the areas where service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix® evaluation, each of the 23 CWM outsourcing service providers are segmented into Leaders, Major Contenders, Aspirants, and Star Performers.

### In this research, we focus on:

- Everest Group's Services PEAK Matrix® evaluation, a comprehensive assessment of 23 CWM outsourcing service providers
  - 2020 CWM outsourcing PEAK Matrix® and Star Performers
  - Service provider delivery capability assessment
- Remarks on key strengths and areas of improvement for each CWM outsourcing service provider
- Service provider landscape

### Scope of this report:



**Geography**  
Global



**Services**  
Contingent Workforce  
Management



### Coverage<sup>1</sup>

Across 23 CWM service providers with multi-process capability including AgileOne, Alexander Mann Solutions, Allegis Global Solutions, AMN Healthcare, Brainnet, Broadleaf Results, Capita Resourcing, Cross Country Healthcare, Fircroft, Geometric Results Inc., Guidant Global, Hays Talent Solutions, HCMWorks, KellyOCG, nextSource, Pontoon, Randstad Sourceright, Resource Solutions, Talent Solutions TAPFIN (ManpowerGroup), Volt Consulting, Workforce Logiq, and Yoh

<sup>1</sup> While we considered a much bigger list of CWM providers, these 23 CWM providers are shortlisted based on their presence and meaningful play in the CWM outsourcing space

## Overview and abbreviated summary of key messages

This report examines the global 2019 Contingent Workforce Management (CWM) service provider landscape and its impact on the CWM market. It focuses on service provider position and landscape in the CWM market, assessment of service provider delivery capabilities and key CWM service provider profiles. It also identifies the key implications of the research findings for buyers and service providers

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

### Service provider position

- There are 22+ service providers with CWM outsourcing experience in the global market
- The CWM market is highly fragmented and competitive, with no player holding a dominant market share

### Service provider landscape

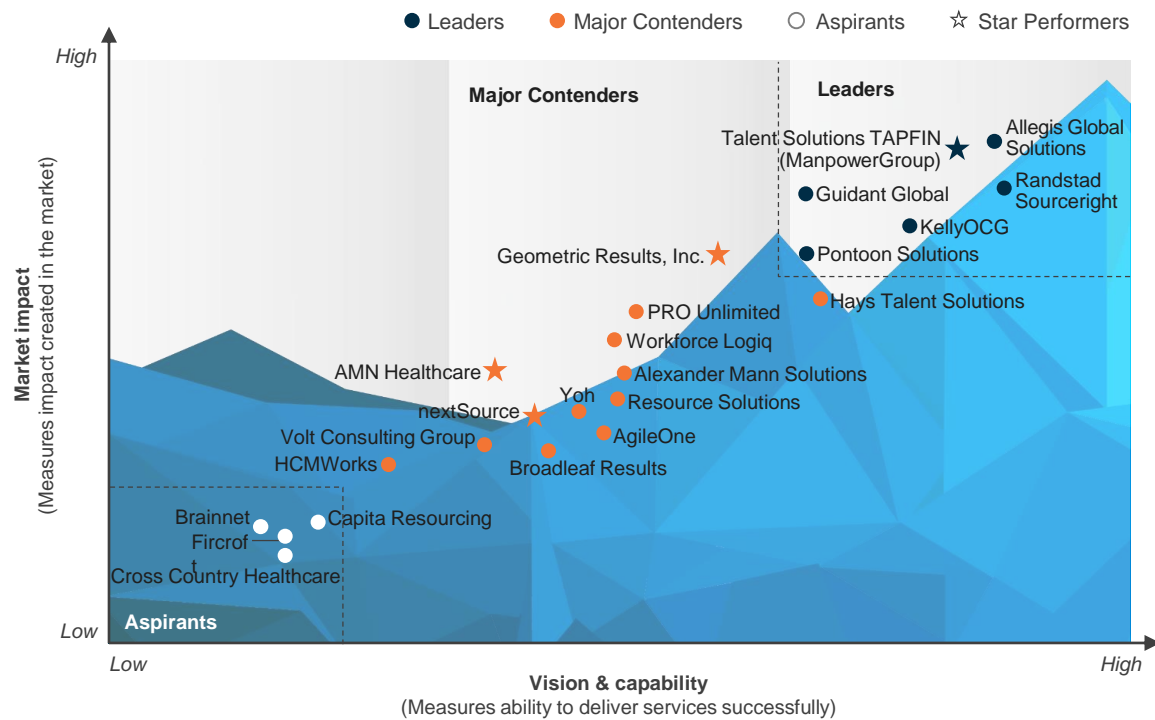
- Leaders (Top providers) hold more than 50% of the global CWM outsourcing market in terms of annual managed spend
- Allegis Global Solutions, and Talent Solution TAPFIN (ManpowerGroup) are among the top service providers having meaningful presence across all geographies, with multiple service providers displaying strong activity in different regions
- The provider landscape by buyer industry is even more fragmented because different service providers have strength in / focus on different industries
- While there is significant gap between Leaders and others in most of the dimensions, the gap is relatively narrower in terms of value perceived by referenced buyers

### Service provider capability

- CWM service providers can be categorized into leaders, major contenders, and aspirants on a capability-market-share matrix
- Allegis Global Solutions, Guidant Global, KellyOCG, Talent Solutions TAPFIN (ManpowerGroup), Pontoon Solutions, and Randstad Sourceright are the current leaders in the global CWM market. However, several service providers are emerging as major contenders

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

Contingent Workforce Management (CWM) Services PEAK Matrix® Assessment 2020<sup>1</sup>



Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

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

Illustrative example

Measure of capability: ● High ○ Low

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

**Strengths**

- XXX is a subsidiary of XXX, one of the world's largest staffing and recruitment services companies. Its expertise spans permanent workforce, contingent workforce, integrated talent, and advisory solutions
- It has a diversified portfolio with significant delivery capability across geographies, categories, and job roles. Enterprises looking for a global service provider to execute complex multi-country/-continent deals spanning industries and job roles will find XXX' offering compelling

**Areas of improvement**

- While it has experience serving clients' in European and Latin American countries (primarily as part of multi-country deals), locally headquartered buyers looking for curated solutions in these countries should evaluate XXX' capabilities carefully, given the relative lack of such clientele in its portfolio
- While it is investing in and leveraging direct sourcing in its existing MSP deals, clients need to evaluate the depth and breadth of its direct sourcing capabilities and experiences before engaging

1 Assessment for Aspirants, and AgileOne, Broadleaf Results, HCMWorks, PRO Unlimited, Resource Solutions, Volt Consulting Group, and Workforce Logiq among Major Contenders excludes service provider inputs. The analysis for these providers is based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with CWM buyers. For these companies, Everest Group's data for assessment may be less complete

Source: Inputs from market players, recruitment firms, and investment agencies



# Research calendar

## Contingent Workforce Management (CWM) Services

Published Planned Current release

### Flagship CWM reports

	Release date
Managed Service Provider (MSP) Service Provider Landscape with PEAK™ Matrix Assessment 2019	June 2019
Managed Service Provider (MSP) Annual Report 2020: Leading Through Disruption	October 2019
Services Procurement – Service Provider Landscape with PEAK Matrix® Assessment 2020: Unlocking the True Potential of Services Procurement	April 2019
<b>Contingent Workforce Management (CWM) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020</b>	<b>August 2020</b>
CWM State of the Market Report 2020	Q2 2020
CWM – Service Provider Profile Compendium 2020	Q2 2020
Total Talent Acquisition (TTA) report	Q3 2020

### Thematic CWM reports

	Release date
In pursuit of best in class MSP program	January 2020
Reshape Services Procurement with analytics – An enterprise guide to unleashing power of data in Services Procurement	March 2020
Collaboration to beat disruption – Future of CWM	July 2020
Contingent Workforce Management (CWM) – Enterprise Pulse 1	Q3 2020
Contingent Workforce Management (CWM) – Enterprise Pulse 2	Q3 2020

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



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