



Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020

Recruitment Process Outsourcing (RPO)

Market Report – April 2020: Complimentary Abstract / Table of Contents

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Custom research capabilities

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

Membership information

- This report is included in the following research program(s)
 - [Recruitment Process Outsourcing \(RPO\)](#)
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com

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Background and methodology of the research

Background of the research

The RPO 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 rate. Although the RPO market has almost matured in certain regions, growth has remained high due to an increase in adoption from mid-market and small market buyers, from new industries, and expansion of existing RPO deals. This report examines the dynamics of the global RPO service provider landscape and its impact on the RPO market. It gives an overview of the market and analyzes the areas wherein service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix® evaluation, each of the 25 RPO 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 25 RPO service providers
 - 2020 RPO PEAK Matrix® and Star Performers
 - Service provider delivery capability assessment
- Remarks on key strengths and areas of improvement for each RPO service provider
- Service provider landscape

The scope and methodology of this report includes:



Services: Recruitment
Process Outsourcing



Geography scope: Global



Coverage¹: Across 25 RPO service providers with multi-process capability including ADP RPO, AgileOne, Alexander Mann Solutions, Allegis Global Solutions, AMN Healthcare, Career International, Cielo, Engage2Excel, Hays Talent Solutions, Hire Velocity, Hudson RPO, IBM, KellyOCG, Korn Ferry RPO, LevelUP, Orion Novotus, PeopleScout, Pierpoint, Pontoon, Randstad Sourceright, Resource Solutions, Sevenstep, Talent Solutions RPO (ManpowerGroup), WilsonHCG, and Yoh

¹ While we considered a much bigger list of RPO providers, these 25 RPO providers are shortlisted based on their presence and meaningful play in the RPO space

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®, 25 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:

RPO PEAK Matrix 2020

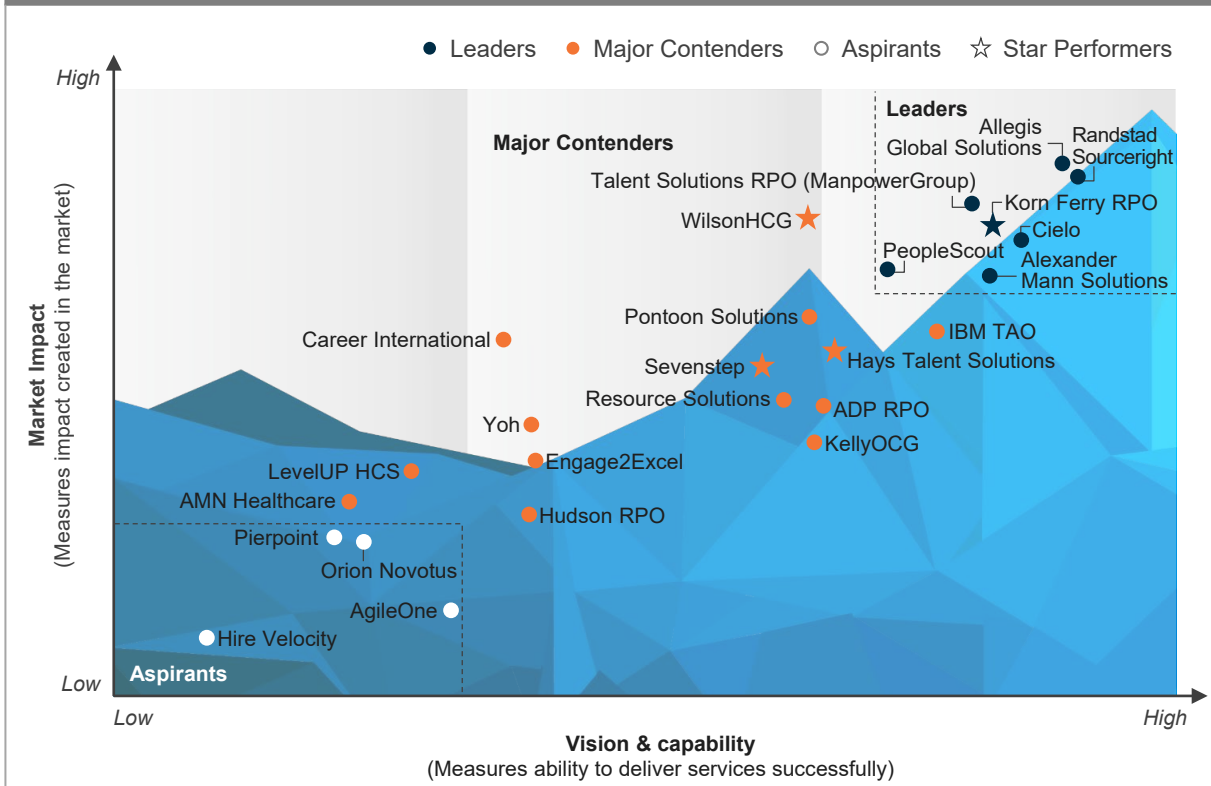
- Everest Group classifies RPO service providers based on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 25 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** Alexander Mann Solutions, Allegis Global Solutions, Cielo, Korn Ferry RPO, PeopleScout, Randstad Sourceright, and Talent Solutions RPO (ManpowerGroup)
 - **Major Contenders:** ADP RPO, AMN Healthcare, Engage2Excel, Hays, Hudson RPO, IBM Talent Acquisition Optimization (IBM TAO), KellyOCG, LevelUP HCS, Pontoon Solutions, Resource Solutions, Sevenstep, WilsonHCG, and Yoh
 - **Aspirants:** AgileOne, Hire Velocity, Orion Novotus, and Pierpoint
 - Everest Group also identified the following providers as Star Performers based on their year-over-year movement on the PEAK Matrix (in alphabetical order): Hays Talent Solutions, Korn Ferry RPO, Sevenstep, and WilsonHCG

RPO service provider commentary

- Everest Group delineates each of the 25 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 two distinct chapters providing a deep dive into key aspects of the RPO market; below are three charts to illustrate the depth of the report

Assessment of RPO Service Providers 2020¹



1 Assessment for AgileOne, Hire Velocity, Hudson RPO, LevelUP HCS, Pierpoint, and Orion Novotus excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with RPO buyers

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

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

- 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 (RPO) Annual Report 2019: Steering 3D Growth on the Tides of Talent Shortage	August 2019
Recruitment Process Outsourcing (RPO) in North America – Service Provider Landscape with Services PEAK Matrix® Assessment 2019	June 2019
Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2019	May 2019
Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	April 2020
RPO in North America – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	Q2 2020
RPO State of the Market report 2020	Q2 2020
RPO - Service Provider Profile Compendium 2020	Q2 2020
Total Talent Acquisition (TTA) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	Q2 2020

Thematic RPO reports

Price Dynamism in the RPO market	December 2019
Impact of Recession on the Business Process Services (BPS) Industry	March 2020
RPO in Europe	Q3 2020
Viewpoint on Multi-country RPO	Q3 2020
Outplacement Services – A Key Ingredient in the Age of Digital Disruption to the Workforce	Q4 2020
Role of Candidate Relationship Management (CRM) in Recruitment	Q4 2020

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

Additional RPO research references

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

1. **Unlocking the Digital Potential in Talent Acquisition** ([EGR-2020-24-V-3430](#)); 2020. Organizations around the world are experiencing digital disruption, which has impacted various functions across industries, including talent acquisition. Increasing awareness of the benefits of digital adoption is pushing enterprises, service providers such as Recruitment Process Outsourcing (RPO) providers and Managed Service Providers (MSPs), and technology start-ups to build capabilities around digital. This paper studies the opposing views on digital, analyzes what services-enabled technology and technology-enabled services mean, and helps enterprises choose the right solution for them through a logical analysis
2. **Recruitment Process Outsourcing – Service Provider Landscape with PEAK Matrix® Assessment 2019** ([EGR-2019-26-R-3113](#)); 2019. The global RPO market witnessed tremendous growth in 2018 as the market witnessed a significant uptick in activity across buyer segments, industries, and geographies. The year 2018 saw a few mega-sized deals being signed as well as significant activity in the mid- and small-market space. As the market continues to become more competitive, service providers are investing heavily in strengthening their capabilities in different geographies, industries, and recruitment technology, as well as expanding their portfolio of offerings (including value-added services such as consulting, total talent acquisition, etc.).
3. **Recruitment Process Outsourcing (RPO) Annual Report 2019: Steering 3D Growth on the Tides of Talent Shortage** ([EGR-2019-26-R-3301](#)); 2019. The RPO market is one of the fastest growing outsourcing markets in the world today, clocking, yet again, double-digit growth rate to the tune of 20% in 2018. This research provides comprehensive coverage of the 2018 RPO market and analyzes it across various aspects such as market overview, regional overview, adoption trends, total talent acquisition, value-added services and capabilities, and digital in recruitment.

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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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