



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

Recruitment Process Outsourcing (RPO)

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

Our research offerings for global services

<ul style="list-style-type: none"> ▶ Market Vista™ Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available 	
<ul style="list-style-type: none"> ▶ Application Services 	<ul style="list-style-type: none"> ▶ Human Resources
<ul style="list-style-type: none"> ▶ BPS Banking & Financial Services 	<ul style="list-style-type: none"> ▶ ITS Banking & Financial Services
<ul style="list-style-type: none"> ▶ BPS Healthcare & Life Sciences 	<ul style="list-style-type: none"> ▶ ITS Healthcare
<ul style="list-style-type: none"> ▶ BPS Insurance 	<ul style="list-style-type: none"> ▶ ITS Insurance
<ul style="list-style-type: none"> ▶ Catalyst™ 	<ul style="list-style-type: none"> ▶ IT Services Executive Insights™
<ul style="list-style-type: none"> ▶ Cloud & Infrastructure 	<ul style="list-style-type: none"> ▶ ITS Life Sciences
<ul style="list-style-type: none"> ▶ Customer Experience Management Services 	<ul style="list-style-type: none"> ▶ Locations Insider™
<ul style="list-style-type: none"> ▶ Data & Analytics 	<ul style="list-style-type: none"> ▶ PricePoint™
<ul style="list-style-type: none"> ▶ Digital Services 	<ul style="list-style-type: none"> ▶ Procurement
<ul style="list-style-type: none"> ▶ Engineering Services 	<ul style="list-style-type: none"> ▶ Recruitment & Talent Acquisition
<ul style="list-style-type: none"> ▶ Enterprise Platform Services 	<ul style="list-style-type: none"> ▶ Service Optimization Technologies
<ul style="list-style-type: none"> ▶ Finance & Accounting 	

More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model® reports
- 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

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

Table of contents (page 1 of 3)

Topic	Page no.
Background and methodology	6
Summary of key messages	12
Section I: RPO service provider landscape in North America	14
• Summary	15
• Overall service provider market share in North America	16
• Inclusion of North America in RPO deals	18
• Multi-country RPO deals originating out of North America	19
• Performance on key parameters	20
• Buyer satisfaction	21
Section II: RPO PEAK Matrix® 2020 – North America	22
• RPO PEAK Matrix® 2020	23
• Summary	27
• Assessment of service providers	28
• Star Performer analysis	33
Section III: Everest Group’s remarks on service providers	35
• ACA Talent	36
• ADP RPO	37
• Advantage xPO	38
• AgileOne	39
• Alexander Mann Solutions	40
• Allegis Global Solutions	41

Section III: Everest Group’s remarks on service providers (continued)

- AMN Healthcare 42
- Cielo 43
- Endevis 44
- Engage2Excel 45
- Hire Velocity 46
- Hudson RPO 47
- Hueman RPO 48
- IBM Talent Acquisition Optimization (IBM TAO) 49
- KellyOCG 50
- KinetixHR 51
- Korn Ferry RPO 52
- LevelUP HCS 53
- Newton Talent 54
- Orion Novotus 55
- PeopleScout 56
- Personify 57
- Pierpoint 58
- Pontoon Solutions 59
- PrincetonOne 60
- Randstad Sourceright 61
- Sevenstep 62
- Talent Solutions RPO (ManpowerGroup) 63
- Wilson HCG 64
- Yoh 65

Table of contents (page 3 of 3)

Topic	Page no.
Appendix	66
• Glossary of terms	67
• Research calendar	69
• References	70

Background and methodology of the research

Background of the research

The RPO market in North America witnessed a double-digit growth rate in 2019. It is one of the most mature and intensely competitive RPO markets globally, with significant presence of all major global and regional service providers. Service providers are constantly differentiating themselves by investing in upgrading technology capabilities, expanding value-added and consulting offering, providing a customized value proposition to buyers of all sizes, and catering to clients from upcoming industries. This report examines the dynamics of the RPO service provider landscape in North America and its impact on the North American RPO 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, all the 30 RPO service providers in North America are segmented into Leaders, Major Contenders, and Aspirants.



In this research, we focus on:

- Everest Group's Services PEAK Matrix® evaluation, a comprehensive assessment of 30 RPO service providers in North America
 - 2020 North America 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: North
America



Coverage¹: Across 30 RPO service providers in North America with multi-process capability including ACA Talent, ADP RPO, Advantage xPO, AgileOne, Alexander Mann Solutions, Allegis Global Solutions, AMN Healthcare, Cielo, Endevis, Engage2Excel, Hire Velocity, Hudson RPO, Hueman RPO, IBM, KellyOCG, KinetixHR, Korn Ferry RPO, LevelUP, Newton Talent, Orion Novotus, PeopleScout, Personify, Pierpoint, Pontoon, PrincetonOne, Randstad Sourceright, Sevenstep, Talent Solutions RPO (ManpowerGroup), WilsonHCG, and Yoh

¹ While we considered a much bigger list of RPO providers, these 30 RPO providers are shortlisted based on their presence and meaningful play in the North America RPO space

Overview and abbreviated summary of key messages

This report examines the dynamics of the Recruitment Process Outsourcing (RPO) market in North America. It provides a deep-dive analysis of how the service providers shape up in terms of their market success and delivery capability in North America. Based on the comprehensive Everest Group PEAK Matrix®, 30 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 in North America PEAK Matrix 2020

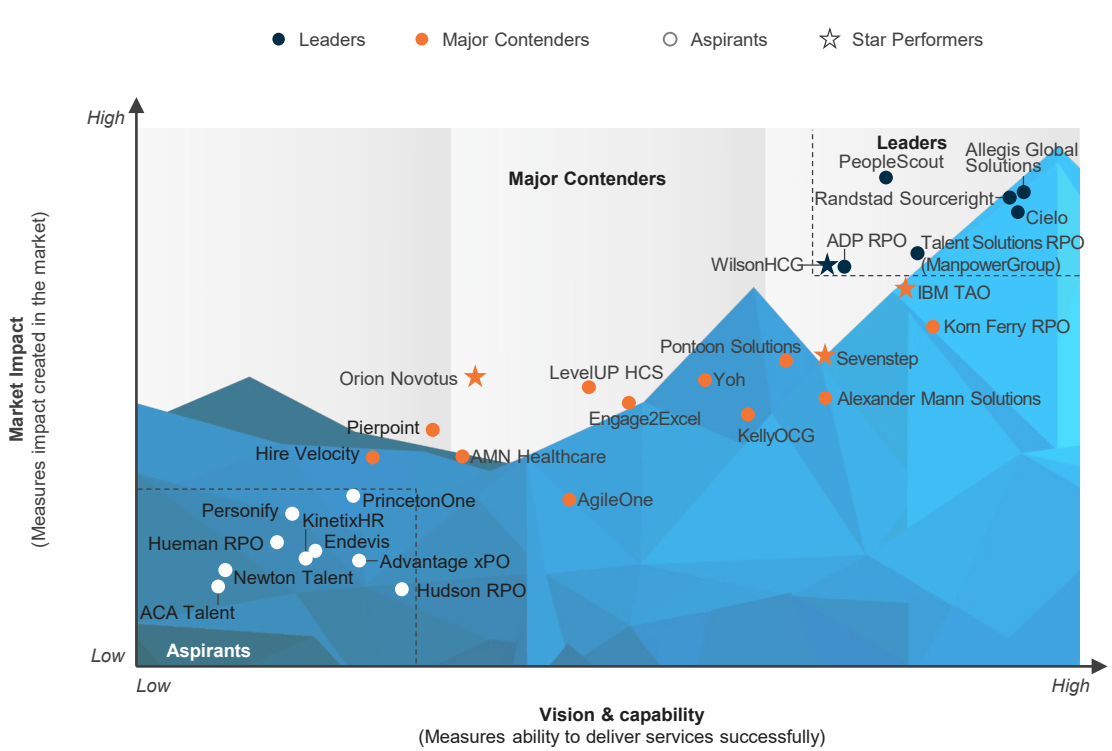
- Everest Group classifies RPO service providers in North America based on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 30 established RPO service providers evaluated in North America are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** ADP RPO, Allegis Global Solutions, Cielo, PeopleScout, Randstad Sourceright, Talent Solutions RPO (ManpowerGroup), and WilsonHCG
 - **Major Contenders:** AgileOne, Alexander Mann Solutions, AMN Healthcare, Engage2Excel, Hire Velocity, IBM Talent Acquisition Optimization (IBM TAO), KellyOCG, Korn Ferry RPO, LevelUP HCS, Orion Novotus, Pierpoint, Pontoon Solutions, Sevenstep, and Yoh
 - **Aspirants:** ACA Talent, Advantage xPO, Endevis, Hueman RPO, Hudson RPO, KinetixHR, Newton Talent, Personify, and PrincetonOne
 - Everest Group also identified the following providers as Star Performers based on their year-over-year movement on the PEAK Matrix (in alphabetical order): IBM TAO, Orion Novotus, Sevenstep, and WilsonHCG

RPO in North America service provider commentary

- Everest Group delineates each of the 30 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 in North America

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

Assessment of RPO Service Providers in North America 2020¹



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

1 Assessment for AgileOne, Hire Velocity, LevelUP HCS, Pierpoint, and Orion Novotus among Major Contenders and all Aspirants 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. 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 – 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	June 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 into 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 2020** ([EGR-2020-26-R-3671](#)); 2020. The RPO market is one of the fastest-growing outsourcing markets globally, which continued to clock double-digit growth in 2019. North America continues to hold the maximum market share, with Europe, the Middle East and Africa, and Asia Pacific emerging as strong markets, posting healthy growth rates. The RPO market has almost matured in certain regions, with high growth attributed to increased adoption from mid-market and small market buyers, new industries, and expansion of existing RPO deals. This report examines the dynamics of the global RPO service provider landscape
3. **Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2020** ([EGR-2020-26-R-3705](#)); 2020. Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2020 provides accurate, comprehensive, and fact-based snapshots of 19 RPO service providers. It offers a detailed profile of each RPO service provider, with a comprehensive picture of their service suite, scale of operations, recent developments and investments, technology solutions, and delivery locations. The report also provides insights into the global RPO service provider landscape. In addition, each profile specifies the position of the service provider on the Everest Group PEAK Matrix® and offers an insightful analysis of its capabilities

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

Arkadev Basak , Vice President:	arkadev.basak@everestgrp.com
Vishal Gupta , Practice Director:	vishal.gupta@everestgrp.com
Krishna Charan , Senior Analyst:	krishna.charna@everestgrp.com
Karneek Patel , Senior Analyst:	karneek.patel@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



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.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

Stay connected

Website



www.everestgrp.com

Social Media



@EverestGroup



@Everest Group

Blog



www.everestgrp.com/blog/

This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.