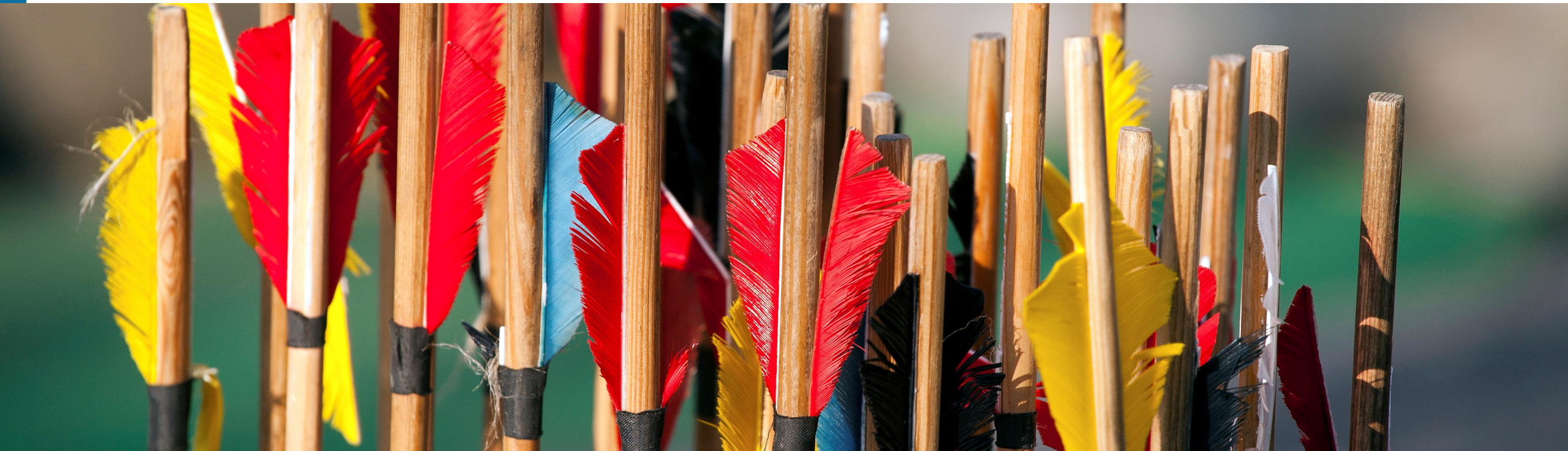


Recruitment Process Outsourcing (RPO) in Europe: Decoding a Heterogeneous Market

September 2020: Complimentary Abstract / Table of Contents



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

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Overview and abbreviated summary of key messages

Recruitment Process Outsourcing (RPO) is one of the fastest-growing outsourcing sectors globally, with a growth rate of 16% and a market size of US\$4.6 billion in 2019. However, the global market is characterized by stark differences among different geographical regions in terms of maturity and market attributes. EMEA is the second largest market after North America, but is highly heterogeneous even within the region, with different countries showing different market characteristics. When it comes to the service provider landscape in the region, it is very different from that of the global landscape, as there are very few providers that have a truly global presence. In this report, we shed light on the RPO market in EMEA and the buyer adoption and solutions trends that exists within the region.

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

RPO market size and growth in EMEA

- The RPO market in EMEA witnessed a growth rate to the tune of 25% in 2019 and was one of the major contributors to the global RPO growth, along with Asia Pacific
- Apart from the UK, significant new deal activity was witnessed in Continental and Eastern European countries

Buyer and solution trends

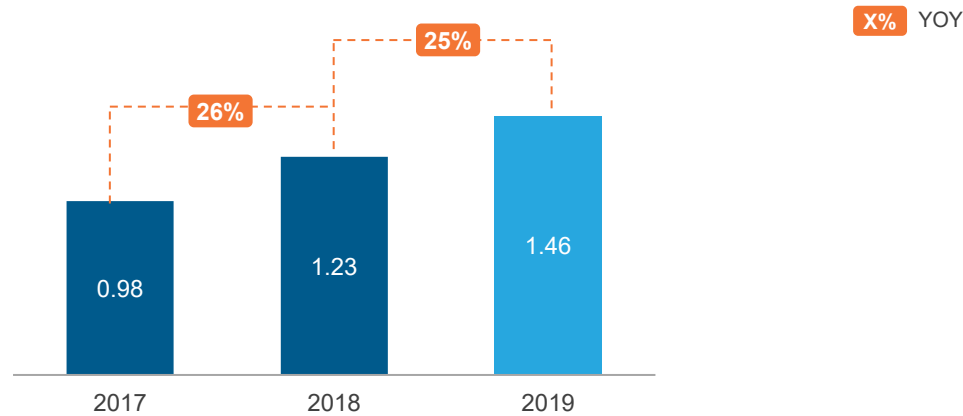
- European buyers are satisfied with the overall performance of their providers; technology and analytics remain areas of improvement for them
- EMEA is witnessing greater instances of local and regional deals, a majority of which is driven by local buyers – a sign of increasing maturity of the region
- EMEA-headquartered firms are signing more regional and local deals as compared to global deals
- Along with the UK, single country RPO activity has been on the rise in some of the countries in Continental Europe as well
- Buyers are increasingly becoming strategic in their nature with increasing leverage of Total Talent Solutions (TTA) and internal hires

Service provider landscape

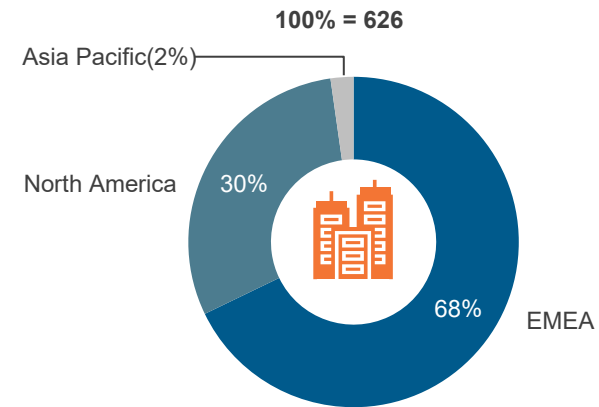
With only a few service providers having a truly global presence, the service provider landscape in the UK and the rest of EMEA is quite different from the global landscape

This study offers a deep dive into the EMEA RPO market with insights on buyer adoption and solutions trends in the region; below are four charts to illustrate the depth of the report

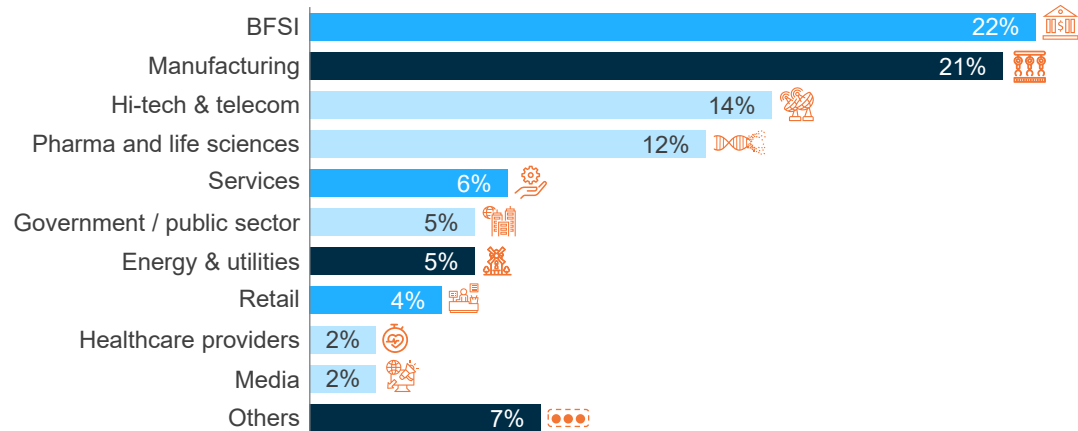
RPO market size in EMEA in US\$ billion



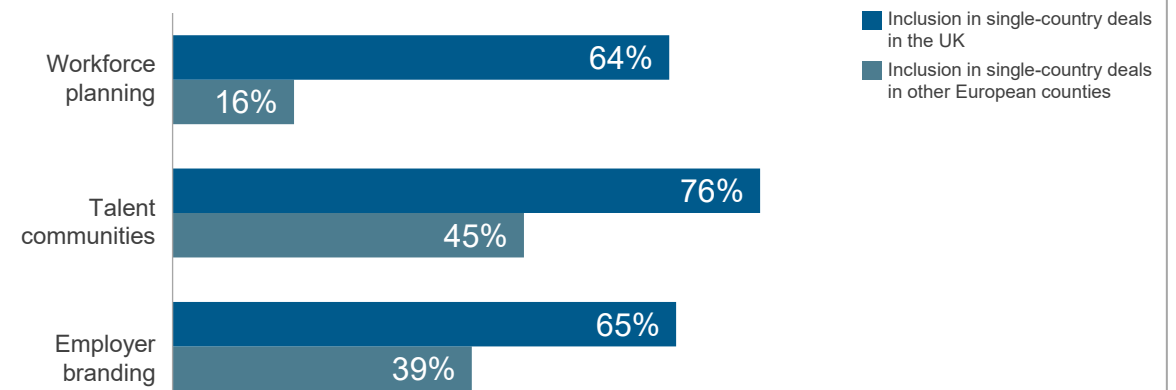
EMEA RPO market composition by buyer headquarters



EMEA RPO market composition by industry



Leverage of value-added services in single-country deals in EMEA



Research calendar

Recruitment & Talent Acquisition

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	March 2019
Recruitment Process Outsourcing (RPO) – Service Provider Profile Compendium 2019	May 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 Landscape with Services PEAK Matrix® Assessment 2020	April 2020
Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	April 2020
Recruitment Process Outsourcing (RPO) in North America – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	June 2020
Recruitment Process Outsourcing (RPO) State of the Market Report 2020: Navigating the Waves of a Global Pandemic	Q4 2020

Thematic RPO reports

Release date

Price Dynamism in the Recruitment Process Outsourcing (RPO) Market	December 2019
The Concept of Ideal Talent – A Game-Changer in Talent Management	December 2019
Unlocking the Digital Potential in Talent Acquisition	January 2020
Impact of Recession on the Business Process Services (BPS) Industry	March 2020
Recruitment Process Outsourcing (RPO) in Europe: Decoding a Heterogeneous Market	September 2020
Outplacement Services – A Key Ingredient in the Age of Digital Disruption to the Workforce	Q4 2020
Total Talent Acquisition	Q4 2020

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