

US IT Contingent Workforce (Staffing) Provider PEAK Matrix® Assessment 2021 – Going Beyond Scale

September 2021: Complimentary Abstract / Table of Contents



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Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Background of the research

The overall contingent workforce (staffing) industry in the US was highly disrupted by COVID-19, with use of temporary talent falling across the country. However, among all the sectors, IT contingent staffing proved to be the most resilient, facing the least contraction and managing a quick recovery. This can be attributed to its easy compatibility with the remote working model. Despite these circumstances, service providers showed resilience and used this adversity as an opportunity to focus on improvements such as remote delivery of services, learning and upskilling, and leverage of technologies. This report examines the dynamics of the contingent IT workforce (staffing) provider landscape in the US and its impact on the US contingent IT staffing market in 2020. 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 22 contingent workforce (staffing) providers 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 22 contingent workforce (staffing) providers in the US
- Service providers’ delivery capability assessment
- Remarks on key strengths and limitations for each contingent IT workforce (staffing) provider
- Service provider landscape

Scope of this report:

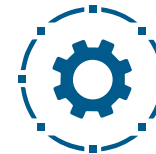


Geography
US



Service providers

Coverage¹: across 22 contingent IT workforce (staffing) providers in the US including Addison Group, American Cyber Systems (ACS Solutions), Apex Systems, Artech, Beacon Hill Staffing, Collabera, Digital Intelligent Systems (DISYS), Experis, Insight Global, Kelly, Kforce, Lorien, Modis, Randstad, RGP, Robert Half, Rose International, Spectraforce, Talentburst, TEKsystems, Volt Information Sciences, and Yoh



Services
Contingent IT workforce (staffing)

¹ While we considered a much bigger list of contingent IT staffing service providers, these 22 providers are shortlisted based on their presence and meaningful play in the contingent IT staffing space in the US

Overview and abbreviated summary of key messages

This report examines the dynamics of the IT contingent workforce (staffing) market in the US. 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®, 22 US IT contingent workforce (staffing) 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:

US IT Contingent Workforce (Staffing) providers PEAK Matrix 2021

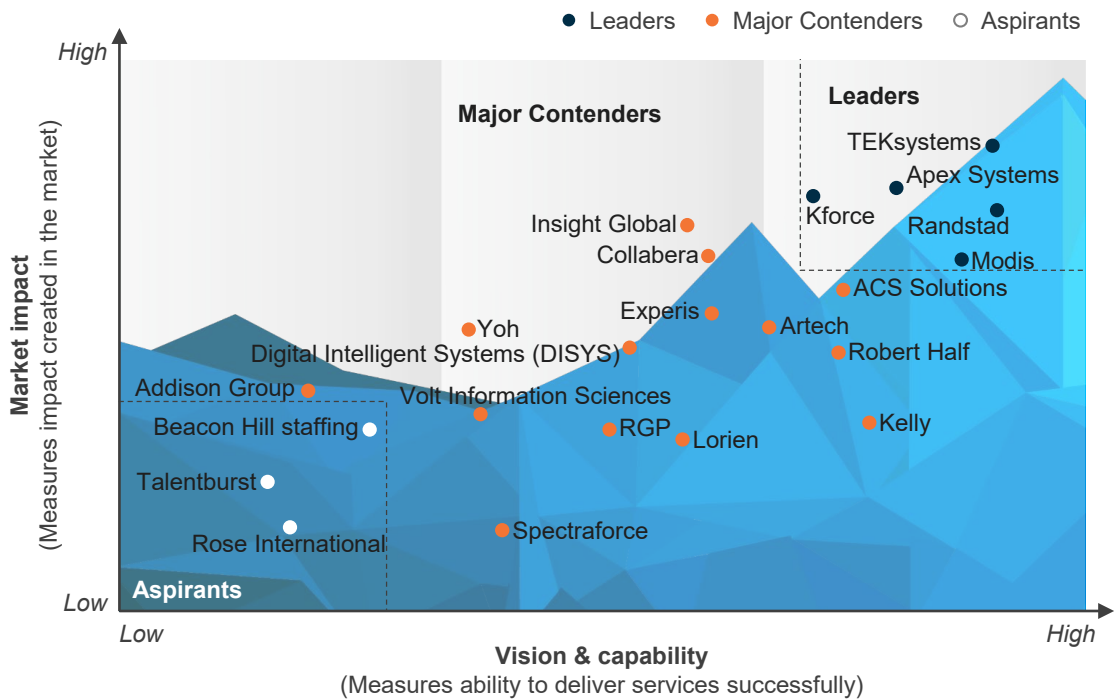
- Everest Group classifies US IT Contingent Workforce (Staffing) providers based on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group’s comprehensive evaluation framework, the PEAK Matrix®, the 22 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** Apex Systems, Kforce, Modis, Randstad, and TEKsystems
 - **Major Contenders:** Addison Group, American Cyber Systems (ACS Solutions), Artech, Collabera, Disys, Experis, Insight Global, Kelly Services, Lorien, RGP, Robert Half, Spectraforce, Volt Information Sciences, and Yoh
 - **Aspirants:** Beacon Hill Staffing, Rose International, and TalentBurst

US IT Contingent Workforce (Staffing) providers commentary

- Everest Group delineates each of the 22 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 US IT contingent workforce (staffing) market; below are three charts to illustrate the depth of the report

US IT Contingent Workforce (Staffing) Provider PEAK Matrix® Assessment 2021^{1,2}



- 1 The assessment of contingent workforce (staffing) providers is done by the brand name on which they operate and compete in the market and not by their parent / group companies
- 2 This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service provider public disclosures, interaction with buyers as well as inputs from providers including Lorien, Modis, Randstad, and Spectraforce

Source: Everest Group (2021)

Capability assessment

Illustrative example

Measure of capability: Low High

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: Low High

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

- It has very strong expertise in sourcing talent for office/clerical and industrial roles, and caters to clients across all major industry verticals
- Its contingent staffing business mainly focuses on providing contingent talent for information technology verticals across all major industries, cutting across a wide gamut of roles, such as application development, infrastructure, and data management services

Areas of improvement

- Its penetration in providing output-based, outsourcing engagements is still on the lower side, and clients specifically looking for such an offering should evaluate its capabilities carefully
- While it does have an associate-facing application, it is basic in terms of functionalities when compared with such applications from other service providers

Research calendar

Contingent Workforce Management

■ Published
 ■ Planned
 ■ Current release

Flagship reports

	Release date
Contingent Workforce Management (CWM) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	August 2020
Tackling the Global Pandemic: Contingent Workforce Management (CWM) State of the Market Report 2021	October 2020
Vendor Management System (VMS) Products PEAK Matrix® Assessment with Technology Vendor Landscape 2021	March 2021
US Contingent Workforce (Staffing) Provider PEAK Matrix® Assessment 2021 – Going Beyond Scale	June 2021
VMS – Service Provider Profile Compendium 2021	July 2021
US IT Contingent Workforce (Staffing) Provider PEAK Matrix® Assessment 2021 – Going Beyond Scale	September 2021
VMS State of the Market Report 2021	Q3 2021
Contingent Workforce Management (CWM) / Managed Service Provider (MSP) and Services Procurement / Statement of Work (SOW) PEAK Matrix® Assessment 2021	Q3 2021

Thematic reports

	Release date
Collaboration to beat disruption – Future of CWM	July 2020
Data & Analytics – Foundational Pillars of Efficient Services Procurement Management	August 2020
The Evolution of Vendor Management Systems (VMSs) for Contingent Workforce Management: What Will Differentiate the VMSs in the Future?	December 2020
A Practical Approach to Total Talent Acquisition	February 2021
Disruption in IT Staffing	May 2021
MSP 4.0 - From Contingent Workforce Management to Contingent Talent Empowerment	July 2021
Demystifying Direct Sourcing	Q3 2021

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