

Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2022 – Global and EMEA

April 2022: Complimentary Abstract / Table of Contents



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Background of the research

After experiencing severe degrowth in 2020, service providers saw a sharp jump in demand for RPO in the wake of the Great Resignation in 2021. As enterprises struggled to fulfill unprecedented talent demand, service providers across the globe stepped in with their existing expertise to augment talent acquisition activities for clients of all sizes and across all industries.

This report examines the dynamics of the global and EMEA RPO service provider landscape and the impact that service providers have created in 2021. 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, RPO service providers are segmented into the categories of Leaders, Major Contenders, Aspirants, and Star Performers in the corresponding PEAK Matrix.

In this research, we focus on:

- Everest Group's Services PEAK Matrix evaluation, a comprehensive assessment of 37 RPO service providers
- 2022 RPO PEAK Matrix and Star Performers
- Service provider capability assessment at the global and EMEA level
- Remarks on key strengths and areas of improvement for each RPO service provider
- Service provider landscape at the global and EMEA level

Scope of this report



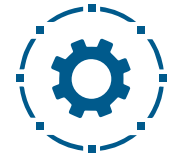
Geography

Global & EMEA



Service providers

Coverage¹: across 37 RPO service providers with multi-process capability including ADP RPO, Advantage xPO US, AgileOne, Allegis Global Solutions, AMN Healthcare, AMS, Broadleaf Results, Career International, Cielo, Compagnon, DZConnex, Endevis, Engage2Excel, FlexAbility, Gattaca, Hays Talent Solutions, Hire Velocity, Hudson RPO, IBM, KellyOCG, Korn Ferry RPO, LevelUP HCS, Lorien Global, Morson Talent, NES Fircroft, Orion Talent RPO Solutions, PeopleScout, Pierpoint International, Pontoon Solutions, PSG Global Solutions, Quess Corp, Randstad Sourceright, Resource Solutions, Serendi, Sevenstep, Talent Solutions RPO (ManpowerGroup), and WilsonHCG



Services

Recruitment Process Outsourcing (RPO)

¹ While we considered a much bigger list of RPO providers, these 37 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 RPO service provider landscape globally, and in EMEA and its impact on the RPO market. It focuses on provider position and growth in the RPO market, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities, and key RPO service provider profiles. It also identifies the key implications of the research findings for buyers and providers.

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

RPO Services PEAK Matrix® 2022 – Global

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 36 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):

Leaders: Allegis Global Solutions, AMS, Cielo, IBM, Korn Ferry RPO, PeopleScout, Randstad Sourceright, and Talent Solutions RPO (ManpowerGroup), WilsonHCG

Major Contenders: ADP RPO, AMN Healthcare, Career International, DZConneX, Engage2Excel, FlexAbility, Hays Talent Solutions, Hudson RPO, KellyOCG, LevelUP HCS, Lorien Global, Orion Talent RPO Solutions, Pierpoint International, Pontoon Solutions, PSG Global Solutions, Resource Solutions, Serendi, and Sevenstep

Aspirants: Advantage xPO, AgileOne, Broadleaf Results, Compagnon, Endevis, Gattaca, Hire Velocity, NES Fircroft, Qness Corp

RPO Services PEAK Matrix® 2022 – EMEA

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 23 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):

Leaders: AMS, Cielo, Hays Talent Solutions, Korn Ferry RPO, Randstad Sourceright, and Talent Solutions RPO (ManpowerGroup)

Major Contenders: Allegis Global Solutions, Hays Talent Solutions, IBM, KellyOCG, LevelUP HCS, Lorien Global, Orion Talent RPO Solutions, PeopleScout, Pierpoint International, Pontoon Solutions, PSG Global Solutions, Resource Solutions, Serendi, and Sevenstep

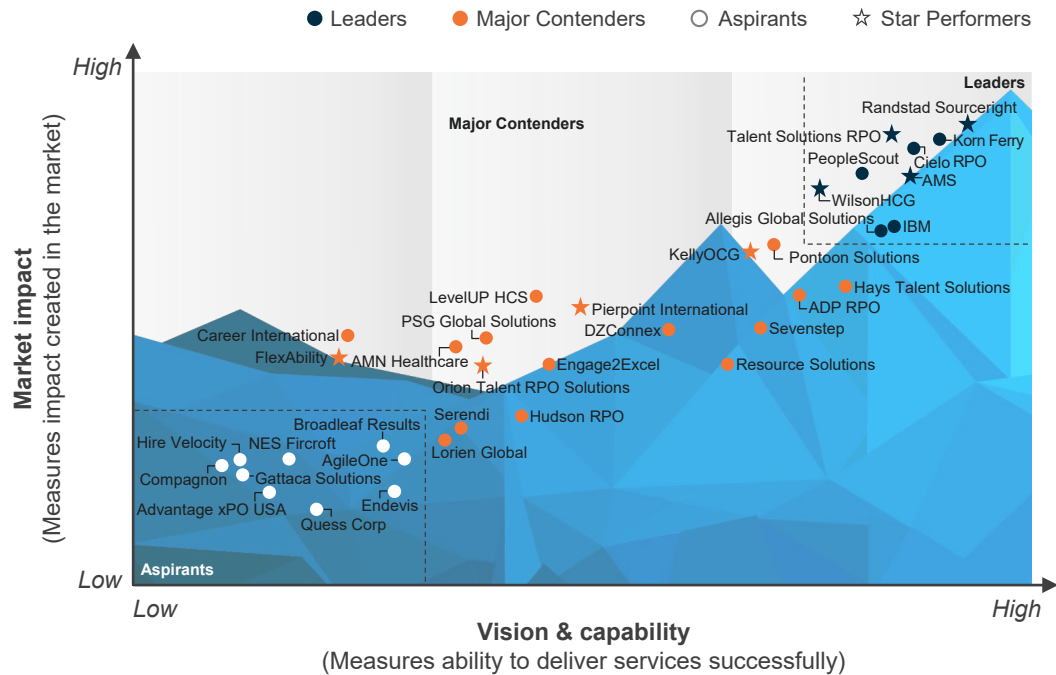
Aspirants: Compagnon, Gattaca, Hudson RPO, Morson Talent, and NES Fircroft

RPO service provider capability overview

- Everest Group delineates each of the 37 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 distinct chapters providing a deep dive into key aspects of the global and EMEA RPO markets; below are three charts to illustrate the depth of the report (page 1 of 2)

RPO Services PEAK Matrix® Assessment 2022 – Global¹



1 Assessments for AgileOne, Career International, Compagnon, Gattaca, NES Fircroft, Hudson RPO, and Hire Velocity exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with RPO buyers.

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: 🕒 Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	🕒	🕒	●	●	🕒	🕒	●	🕒	🕒
Provider 2	🕒	🕒	●	🕒	🕒	🕒	●	🕒	🕒
Provider 3	🕒	●	●	●	●	🕒	🕒	🕒	●
Provider 4	🕒	●	●	●	●	🕒	●	🕒	●
Provider 5	●	●	●	●	●	🕒	🕒	🕒	●
Provider 6	●	●	●	●	●	🕒	🕒	●	●
Provider 7	●	●	●	●	●	🕒	●	●	●
Provider 8	●	🕒	●	●	🕒	🕒	🕒	●	●
Provider 9	🕒	●	●	●	●	🕒	●	●	●

Everest Group's remarks on providers

Illustrative example

Measure of capability: 🕒 Low ● High

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

Strengths

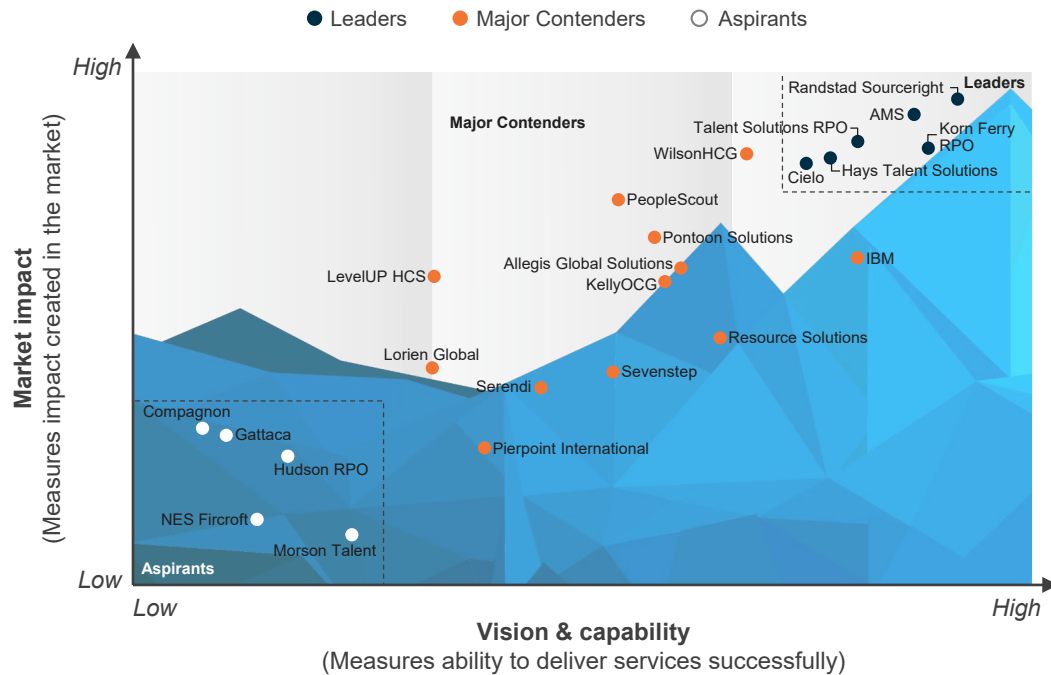
- Provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Limitations

- 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

This study offers distinct chapters providing a deep dive into key aspects of the global and EMEA RPO markets; below are three charts to illustrate the depth of the report (page 2 of 2)

RPO Services PEAK Matrix® Assessment 2022 – EMEA¹



1 Assessments for Compagnon, Gattaca, NES Fircroft, and Hudson RPO exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with RPO buyers.

Source: Everest Group (2022)

Capability assessment

Illustrative example

Measure of capability: 🟡 Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 2	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 3	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 4	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 5	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 6	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 7	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 8	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 9	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡

Everest Group's remarks on 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

- 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

Limitations

- 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

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Recruitment Process Outsourcing (RPO) – Service Provider Landscape with PEAK Matrix® Assessment 2021	April 2021
Recruitment Process Outsourcing (RPO) in North America – Service Provider Landscape with PEAK Matrix® Assessment 2021	April 2021
Recruitment Process Outsourcing (RPO) – Service Provider Compendium 2021	June 2021
Building for the New Normal: Recruitment Process Outsourcing (RPO) State of the Market Report 2021	September 2021
Future of Work Series: Reimagining Workforce and Workplace Mechanics	September 2021
Future of Work Series Reimagining Workforce and Workplace Mechanics: Who Will Do the Work?	February 2022
Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2022 – Global and EMEA	April 2022
Recruitment Process Outsourcing (RPO) – Service Provider Compendium 2022	Q2 2022
Recruitment Process Outsourcing (RPO) – State of the Market Report 2022	Q2 2022
Future of Work Series Reimagining Workforce and Workplace Mechanics: How Will the Work Be Done?	Q2 2022
Maneuvering through Talent Challenges in Life Sciences: The Role of Recruitment Process Outsourcing (RPO) 4.0	Q2 2022
Maneuvering through Talent Challenges in Healthcare: The Role of Recruitment Process Outsourcing (RPO) 4.0	Q2 2022
Maneuvering through Talent Challenges in Manufacturing: The Role of Recruitment Process Outsourcing (RPO) 4.0	Q2 2022
Maneuvering through Talent Challenges in Consumer Brands and Retail: The Role of Recruitment Process Outsourcing (RPO) 4.0	Q2 2022

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