

# UK Contingent Staffing Services PEAK Matrix® Assessment 2023

November 2022: Complimentary Abstract / Table of Contents



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# Contents

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<b>1. Introduction and overview</b>	<b>05</b>
• Research methodology	05
• Key information on the report	06
• Background of the research	07
• Objective of the research	08
• Focus of the research	09
<b>2. Summary of key messages</b>	<b>10</b>
• UK (overall) Contingent Staffing Services PEAK Matrix® Assessment 2022	11
• UK IT Contingent Staffing Services PEAK Matrix® Assessment 2022	12
<b>3. Provider landscape</b>	<b>13</b>
• Provider landscape by overall market share	14
• Share of revenue – Leaders vs others	15
• Performance on key parameters – Leaders vs others	16
<b>4. UK (Overall) Contingent Staffing Services PEAK Matrix® characteristics</b>	<b>17</b>
• PEAK Matrix® framework	18
• Everest Group PEAK Matrix® for UK (overall) contingent staffing services	20
• Characteristics of Leaders, Major Contenders, and Aspirants	21
• Summary dashboard for Leaders, Major Contenders, and Aspirants	22
<b>5. UK IT Contingent Staffing Services PEAK Matrix® characteristics</b>	<b>26</b>
• Everest Group PEAK Matrix® for UK IT contingent staffing services	27
• Characteristics of Leaders, Major Contenders, and Aspirants	28
• Summary dashboard for Leaders, Major Contenders, and Aspirants	29
<b>6. Enterprise sourcing considerations</b>	<b>32</b>
• Adecco	33
• Advantage Resourcing	34

# Contents

<b>6. Enterprise sourcing considerations (continued)</b>	
• Aston Carter	35
• Computer Futures	36
• Experis	37
• Gi Group	38
• Hays	39
• Lorien	40
• Manpower	41
• Matchtech	42
• Michael Page	43
• NES Fircroft	44
• Networkers	45
• NRL	46
• Orion Group	47
• Project People	48
• Randstad	49
• Reed Recruitment	50
• Robert Walters	51
• Rullion	52
• TEKsystems	53
<b>7. Appendix</b>	<b>54</b>
• Glossary	55
• Research calendar	56

# Introduction

Contingent staffing industry in the UK experienced contraction in 2020 due to impact of the pandemic and macro-economic conditions. The industry began recovery from the last quarter of 2020, and it continued in the year 2021 with second half of the year driving growth significantly. Enterprises started to show greater confidence in engaging with service providers once the pandemic subsided and the lockdowns were lifted.

The recovery in the UK contingent staffing market is led by factors such as rapid rise in talent demand-supply gap, labor pyramid distortion, and the Great Resignation. Service providers leveraged these opportunities and amplified their efforts to improve sourcing capabilities to meet the excessive demand from enterprises, especially in the latter part of the year. The year 2021 also saw areas such as DE&I, upskilling and reskilling, and managed services starting to gain prominence and being the differentiating factors among service providers in the industry.

This report examines the dynamics of the contingent staffing provider landscape in the UK and its impact on the UK contingent staffing market in 2021 from the lens of the overall staffing capabilities and IT staffing capabilities. 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, each of the 21 contingent staffing providers are segmented into Leaders, Major Contenders, and Aspirants.

In this research, we focus on:

- Everest Group’s UK Contingent Staffing Services PEAK Matrix® evaluation, a comprehensive assessment of 18 contingent staffing providers in the UK
- Everest Group’s UK IT Contingent Staffing Services PEAK Matrix® evaluation, a comprehensive assessment of 15 contingent staffing providers in the UK
- Service providers’ delivery capability assessment
- Remarks on key strengths and limitations for each contingent staffing provider
- Service provider landscape

## Scope of this report

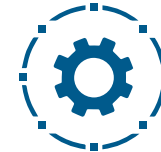


**Geography**  
The UK



### Providers

Coverage: across 21 staffing service providers in the UK including Adecco, Advantage Resourcing, Aston Carter, Computer Futures, Experis, Gi Group, Hays, Lorien, Manpower, Matchtech, Michael Page, NES Fircroft, Networkers, NRL, Orion Group, Project People, Randstad, Reed Recruitment, Robert Walters, Rullion, and TEKsystems



**Services**  
Contingent staffing

## Overview and abbreviated summary of key messages

This report examines the UK contingent staffing provider landscape and its impact on the contingent staffing market. It focuses on provider position and growth in contingent staffing market, changing market dynamics and emerging provider trends, assessment of provider delivery capabilities, and key contingent staffing 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:

### UK (Overall) Contingent Staffing Services PEAK Matrix® Assessment

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 18 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** Adecco, Hays, Manpower, and Reed Recruitment
- **Major Contenders:** Advantage Resourcing, Aston Carter, Experis, Gi Group, Lorien, Matchtech, Michael Page, NES Fircroft, Orion Group, Randstad, Robert Walters, and Rullion
- **Aspirants:** NRL and Project People

### UK IT Contingent Staffing Services PEAK Matrix® 2022

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 15 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

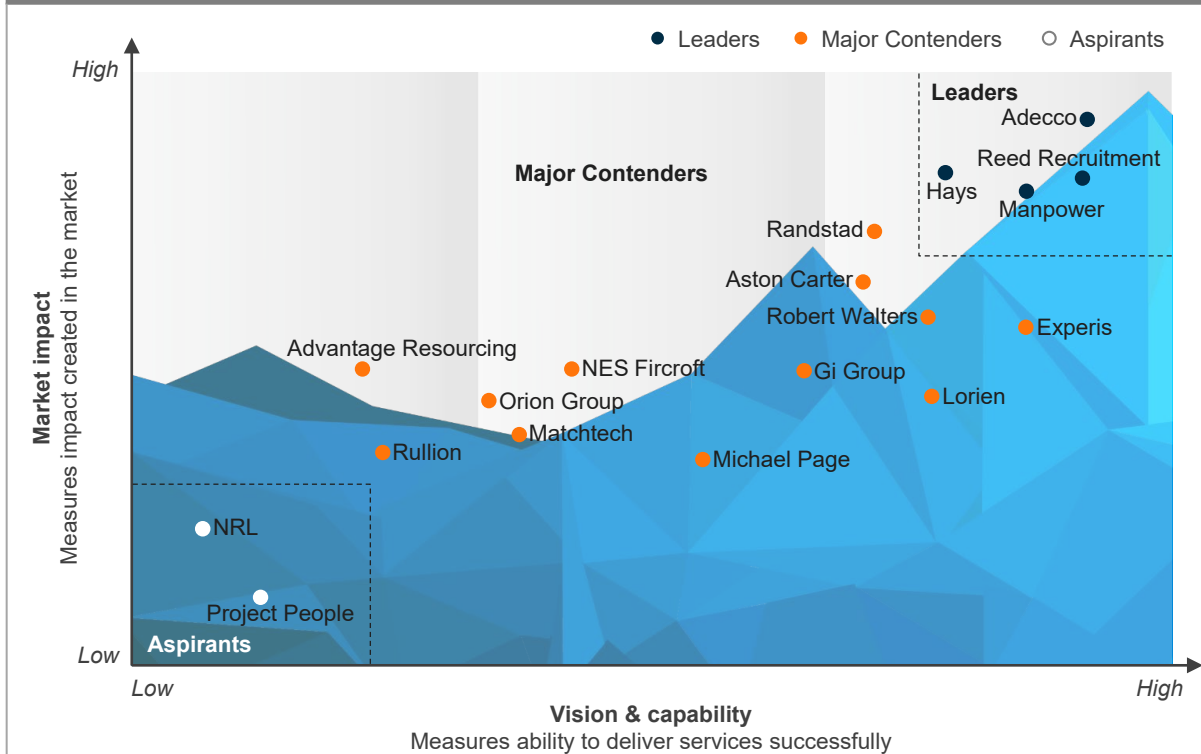
- **Leaders:** Experis, Hays, Lorien, and Reed Recruitment
- **Major Contenders:** Adecco, Advantage Resourcing, Computer Futures, Michael Page, Networkers, Project People, Randstad, Robert Walters, and TEKsystems
- **Aspirants:** NES Fircroft and Rullion

### Contingent Staffing service provider capability overview

- Everest Group delineates each of the 21 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 7 distinct chapters providing a deep dive into key aspects of contingent staffing market; below are three charts to illustrate the depth of the report

UK (Overall) Contingent Staffing Services PEAK Matrix® Assessment 2022<sup>1,2</sup>



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 is a global contingent staffing provider with a strong presence in the UK. It offers both temporary and permanent staffing services to its clients. It has established itself as the front runner in delivering talent to domains such as driving and logistics, industrial, engineering, contact center, and customer service
- It offers a comprehensive suite of upskilling and reskilling services, a training and development suite, which connects associates to thousands of online, self-paced courses and is free for associates and employees

**Limitations**

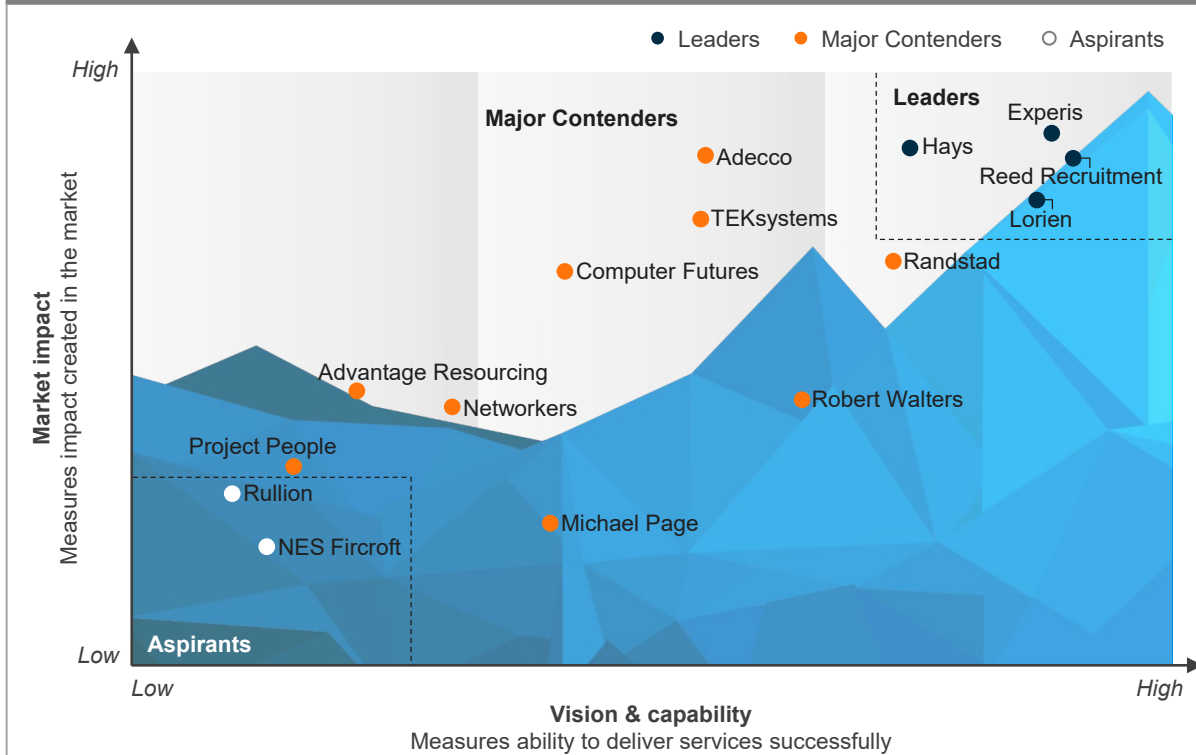
- Provider already has a wide portfolio of clientele; however, it is yet to achieve market success in catering to industries such as retail and consumer goods, pharma, healthcare, and life sciences
- While its peers are continuously investing in developing well-rounded managed services offerings, provider slightly lags in offering these solutions as the majority of its experience comes from staff augmentation

1 The assessment of contingent staffing providers has been done by the brand name on which they operate in the market and not by their parent/group company names  
 2 This assessment is based on Everest Group's estimates leveraging its proprietary Transaction Intelligence (TI) database, providers' public disclosures, interactions with buyers, and detailed/partial inputs from providers including Adecco, Expiris, Hays, Lorien, Manpower, and Randstad, who were contacted specifically as part of this assessment and/or as part of the US Contingent Staffing Services Assessment 2022

Source: Everest Group (2022)

# This study offers 7 distinct chapters providing a deep dive into key aspects of contingent staffing market; below are three charts to illustrate the depth of the report

UK IT Contingent Staffing Services PEAK Matrix® Assessment 2022<sup>1,2</sup>



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 is one of the leading IT staffing providers globally and has strong presence in the UK too. It offers services such as IT staffing, IT consulting, project services, and managed services. It has developed efficient capabilities to source across the length and breadth of IT talent
- Provider has made significant investments to develop its managed services offerings. It is one of the few staffing service providers offering IT strategic advisory and end-to-end IT project execution to its clients

**Limitations**

- Provider has invested significantly in developing a full suite of tools and technology stack. To provide enriched experience to its clients and candidates and to move ahead of its competitors, it should amplify its investments in mobile applications
- Provider has a wide portfolio of clients and has expertise in catering to clients from various industries. However, its penetration and market success in industries such as pharma, life sciences, and healthcare is yet to be verified

1 The assessment of contingent staffing providers has been done by the brand name on which they operate in the market and not by their parent/group company names  
 2 This assessment is based on Everest Group's estimates leveraging its proprietary Transaction Intelligence (TI) database, providers' public disclosures, interactions with buyers, and detailed/partial inputs from providers including Adecco, Experis, Hays, Lorien, and Randstad, who were contacted specifically as part of this assessment and/or as part of the US Contingent Staffing Services Assessment 2022

Source: Everest Group (2022)



# Research calendar

## Contingent Staffing

Published
  Planned
  Current release

Reports title	Release date
Disruption in IT Staffing	May 2021
US Contingent Workforce (Staffing) Provider PEAK Matrix® Assessment 2021 – Going Beyond Scale	June 2021
US IT Contingent Workforce (Staffing) Provider PEAK Matrix® Assessment 2021 – Going Beyond Scale	September 2021
Contingent Workforce (Staffing) State of the Market Report 2022: Disrupt or Get Disrupted	November 2021
Positioning for Success: Pivot toward Managed Services Engagements	July 2022
US Contingent Staffing Services PEAK Matrix® Assessment 2022	July 2022
<b>UK Contingent Staffing Services PEAK Matrix® Assessment 2023</b>	<b>November 2022</b>
Contingent Staffing Services State of the Market report 2023	Q4 2022
Digital-first Staffing – Overview Of Next-generation Tech Tools To Source And Retain Skilled Talent	Q4 2022
Building Winning Talent Strategies To Thrive During Recession	Q1 2023
Non-linear Career Pathways To Build Tomorrow's Workforce	Q2 2023
US Contingent Staffing Provider PEAK Matrix® Assessment 2023	Q3 2023
US Contingent Staffing Provider Compendium 2023	Q3 2023
Reinforcing Impact Sourcing with the Right Partner Strategy	Q3 2023
UK Contingent Staffing Provider PEAK Matrix® Assessment 2023	Q4 2023

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