

Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2023

May 2023: Complimentary Abstract / Table of Contents



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- ▶ Multi-country Payroll
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- ▶ Pricing Analytics as a Service
- ▶ Process Mining
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG Information Technology
- ▶ Retirement Technologies
- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Sustainability Technology and Services
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
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Focus of the research

Enterprises looked toward RPO as a strategic enabler of their talent goals when strained by a widening skills gap and navigating a choppy talent market. Service providers across the world stepped up to this opportunity and evolved along with the needs of the market. Augmented by advancing technology, they deployed their domain expertise to assist buyers across segments with transforming their strategies for permanent talent acquisition.

This report examines the dynamics of the global, North America, EMEA, and Asia Pacific RPO service provider landscape and the impact that service providers have created in 2022. 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 RPO Services PEAK Matrix® evaluation, a comprehensive assessment of 49 RPO service providers
- 2023 RPO PEAK Matrix® and Star Performers
- Service provider capability assessment at the global, North America, EMEA, and Asia Pacific levels
- Remarks on key strengths and areas of improvement for each RPO service provider

Scope of this report



Geography
Global



Providers

ADP RPO, AgileOne, Allegis Global Solutions, AMN Healthcare, AMS, Aspirant, Boyd and Moore Executive Search, Broadleaf Results, Career International, Careernet, Cielo, Compagnon, DZConneX, Engage2Excel, enPower, Gattaca Solutions, Harrier Talent Solutions, Hays, Hire Velocity, Hudson RPO, Hueman RPO, IBM, Instant Impact, Job.com, KellyOCG, Kinetix, Korn Ferry, LevelUP HCS, Lorien Global, Morson Talent, NES Advantage, NLB Services, Orion Talent, Page Outsourcing, PeopleScout, Pierpoint International, Pontoon Solutions, PSG Global Solutions, Quess Corp, Randstad Sourceright, Resource Solutions, RGF Staffing, Serendi, Sevenstep, Sterksen, Sysgen RPO, Taggd, Talent Solutions RPO (ManpowerGroup), and WilsonHCG



Services
Recruitment Process Outsourcing (RPO)

Overview and abbreviated summary of key messages

This report examines the dynamics of the global, North America, EMEA, and Asia Pacific RPO service provider landscape and the impact that service providers have created in 2022. It focuses on provider position and growth in the RPO market, 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® 2023 – Global

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 34 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** AMS, Cielo, Korn Ferry, PeopleScout, Randstad Sourceright, Talent Solutions RPO (ManpowerGroup), and WilsonHCG
- **Major Contenders:** ADP RPO, Allegis Global Solutions, Career International, DZConneX, Engage2Excel, Hays, Hudson RPO, Hueman RPO, IBM, KellyOCG, LevelUP HCS, Pierpoint International, Pontoon Solutions, PSG Global Solutions, Resource Solutions, Sevenstep, and Taggd
- **Aspirants:** AgileOne, AMN Healthcare, Broadleaf Results, Hire Velocity, Job.com, Lorien Global, NES Advantage, NLB Services, Page Outsourcing, RGF Staffing

RPO Services PEAK Matrix® 2023 – North America

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 30 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** Allegis Global Solutions, Cielo, Korn Ferry, PeopleScout, Randstad Sourceright, Talent Solutions RPO (ManpowerGroup), and WilsonHCG
- **Major Contenders:** ADP RPO, AMN Healthcare, AMS, Broadleaf Results, DZConneX, Engage2Excel, Hire Velocity, Hueman RPO, IBM, Job.com, KellyOCG, LevelUP HCS, Orion Talent, Pierpoint International, Pontoon Solutions, PSG Global Solutions, and Sevenstep
- **Aspirants:** AgileOne, Aspirant, Kinetix, NLB Services, RGF Staffing, and Sysgen RPO

Overview and abbreviated summary of key messages

RPO Services PEAK Matrix® 2023 – EMEA

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 25 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** AMS, Cielo, Hays, Korn Ferry, Randstad Sourceright, and Talent Solutions RPO (ManpowerGroup)
- **Major Contenders:** Allegis Global Solutions, IBM, KellyOCG, LevelUP HCS, Lorien Global, NES Advantage, Page Outsourcing, PeopleScout, Pontoon Solutions, Resource Solutions, Serendi, Sevenstep, and WilsonHCG
- **Aspirants:** Compagnon, Gattaca Solutions, Instant Impact, Morson Talent, RGF Staffing, and Sterksen

RPO Services PEAK Matrix® 2023 – Asia Pacific

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 24 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):

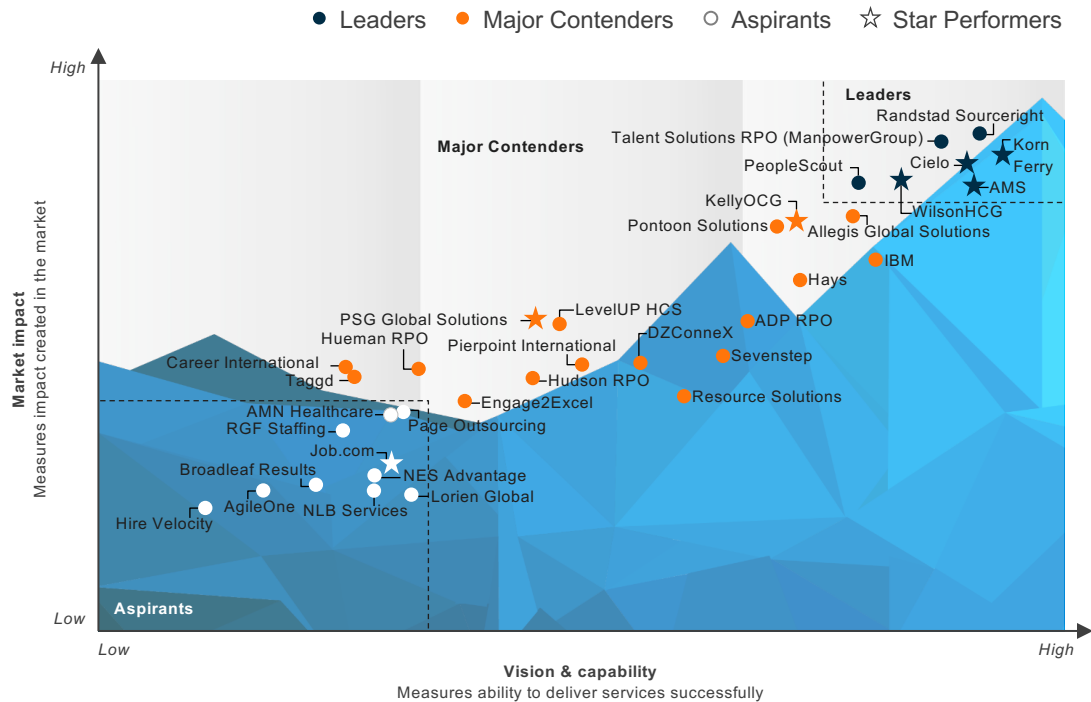
- **Leaders:** Allegis Global Solutions, AMS, Hays, Korn Ferry, Randstad Sourceright, Talent Solutions RPO (ManpowerGroup)
- **Major Contenders:** Career International, Cielo, Harrier Talent Solutions, Hudson RPO, IBM, KellyOCG, PeopleScout, Pontoon Solutions, PSG Global Solutions, Resource Solutions, Taggd, and WilsonHCG
- **Aspirants:** Boyd and Moore Executive Search, Careernet, enPower, NLB Services, Quess Corp, and RGF Staffing

RPO service provider capability overview

- Everest Group delineates each of the 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 global Recruitment Process Outsourcing (RPO) market; below are three charts to illustrate the depth of the report

Everest Group Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2023 – Global¹



1 Assessments for AgileOne, AMN Healthcare, Career International, Hudson RPO, Hire Velocity, and Taggd 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

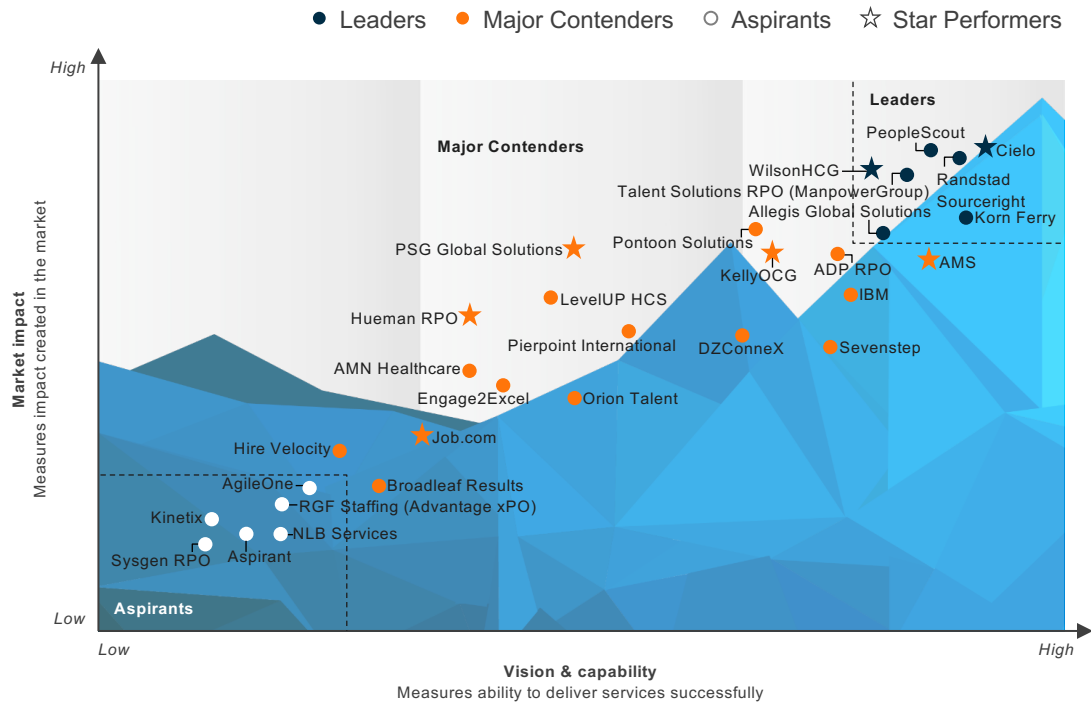
- Provider 1 has a global delivery footprint and operates across the world. Its worldwide presence and delivery network enables it to execute both regional and global deals effectively
- Provider 1 has developed one of the most advanced and comprehensive technology ecosystems in the RPO space and continues to further invest in its improvement

Limitations

- Despite its global footprint, Provider 1 has limited experience in hiring in the Middle East and Africa region
- Its buyer portfolio is centered around a few key industries, and it lacks exposure to sectors such as hi-tech and telecom, retail, and healthcare

This study offers distinct chapters providing a deep dive into key aspects of North America Recruitment Process Outsourcing (RPO) market; below are three charts to illustrate the depth of the report

Everest Group Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2023 – North America¹



1 Assessments for AgileOne, AMN Healthcare, Hire Velocity, and Sysgen 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

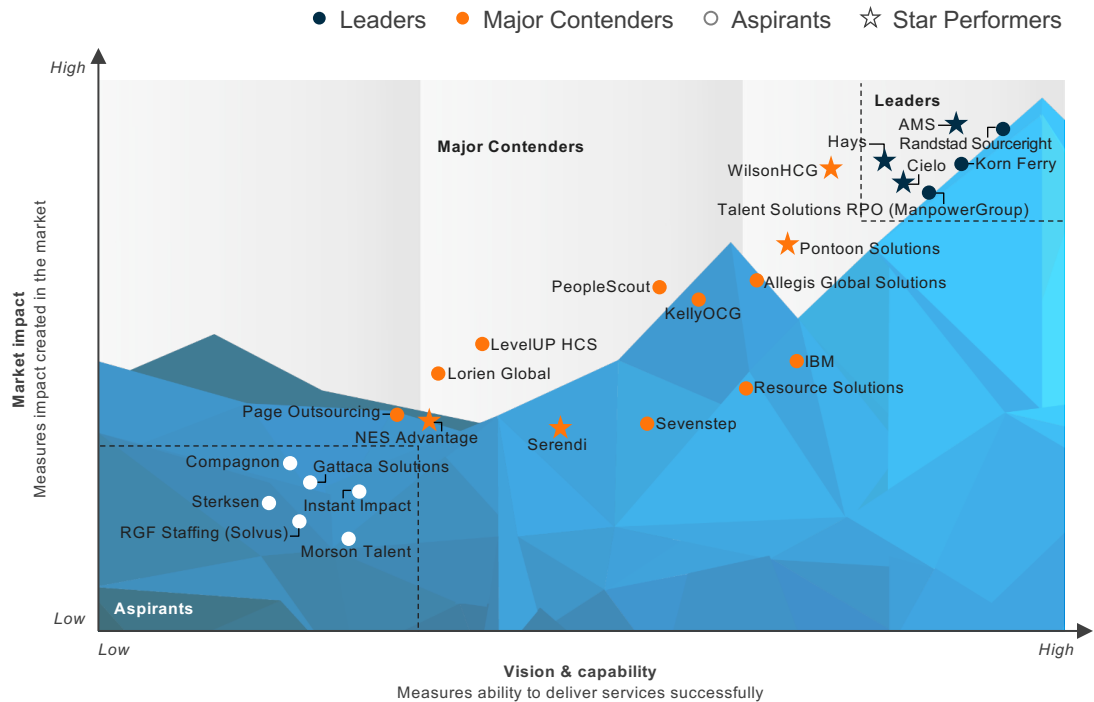
- Its operations are focused on the North American market, and it has gained buyers in the US
- It has experience in engaging with mid- and large-market enterprises from diverse sectors, including hi-tech and telecom, retail, and manufacturing

Limitations

- Provider 1 has no presence outside the US and hence it may not suit the requirements for buyers looking for services across geographies
- Buyers seeking holistic total talent solutions might not find their needs met since Provider 1 has not yet developed a TTA offering

This study offers distinct chapters providing a deep dive into key aspects of EMEA Recruitment Process Outsourcing (RPO) market; below are three charts to illustrate the depth of the report

Everest Group Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2023 – EMEA¹



1 Assessments for Compagnon, Gattaca Solutions, Morson Talent, and Sterksen 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

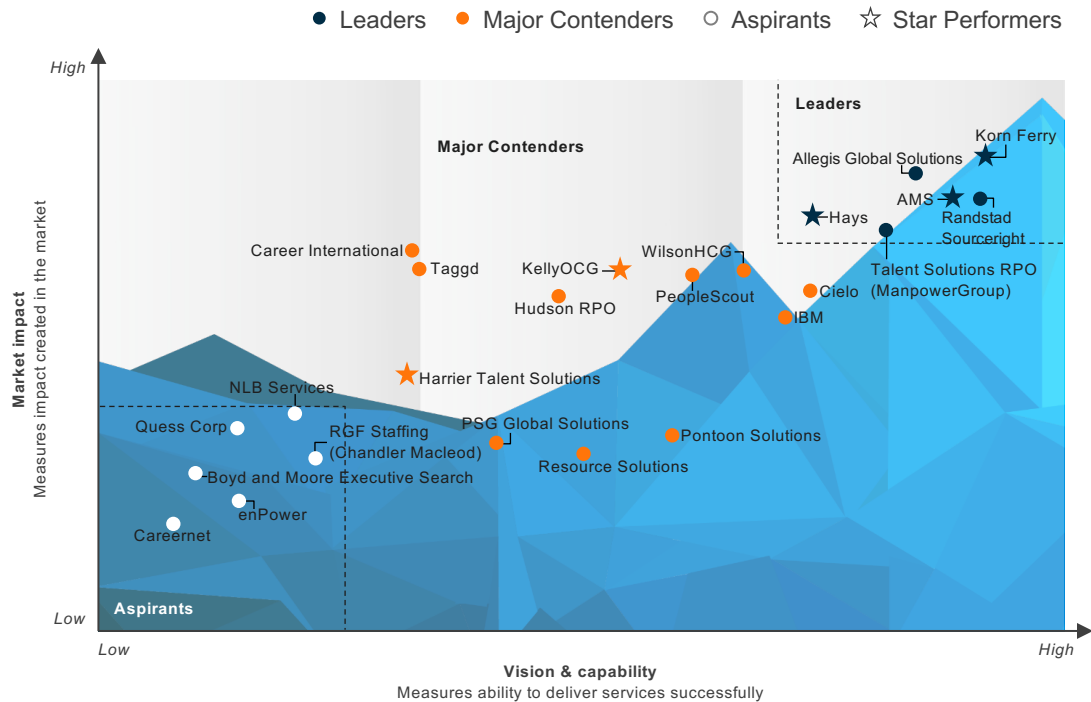
- It specializes in serving the European market with a strong presence in Western Europe, including Germany, Switzerland, and the UK
- It has a strong pedigree in sourcing skilled, white-collar talent, especially IT professionals and healthcare workers

Limitations

- It has limited experience in serving clients from the Nordics and Central and Eastern Europe
- While it offers direct sourcing support, it is a relatively new entrant in the TTA space and has seen limited success

This study offers distinct chapters providing a deep dive into key aspects of Asia Pacific Recruitment Process Outsourcing (RPO) market; below are three charts to illustrate the depth of the report

Everest Group Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2023 – Asia Pacific¹



1 Assessments for Boyd and Moore Executive Search, enPower, Career International, Careernet, Hudson RPO, and Taggd 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 an expansive footprint across Asia Pacific delivering RPO in all major economies and emerging markets, including Australia, India, China, and Singapore

Limitations

- It has a limited presence in the US and across Latin America. Buyers looking for expertise in these regions may need to evaluate its suitability
- It does not have a sophisticated analytics and reporting solution to provide insights into the RPO program performance or talent market intelligence

Research calendar

Recruitment

■ Published
 ■ Planned
 ■ Current release

Reports title	Release date
Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2022 – Global and EMEA	April 2022
Future of Work Series Reimagining Workforce and Workplace Mechanics: How Will the Work Be Done?	August 2022
Recruitment Process Outsourcing (RPO) – Service Provider Compendium 2022	July 2022
Recruitment Process Outsourcing (RPO) – What Do RPO Buyers Want?	September 2022
Recruitment Process Outsourcing (RPO) State of the Market Report 2022	October 2022
Candidate Relationship Management (CRM) Platforms PEAK Matrix® Assessment 2023	May 2023
Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2023	May 2023
Maneuvering through Talent Challenges in Life Sciences: The Role of Recruitment Process Outsourcing (RPO) 4.0	Q2 2023
Maneuvering through Talent Challenges in Healthcare: The Role of Recruitment Process Outsourcing (RPO) 4.0	Q2 2023
Maneuvering through Talent Challenges in Manufacturing: The Role of Recruitment Process Outsourcing (RPO) 4.0	Q2 2023
Maneuvering through Talent Challenges in Consumer Brands and Retail: The Role of Recruitment Process Outsourcing (RPO) 4.0	Q2 2023
Candidate Relationship Management (CRM) – Platform Vendor Compendium 2023	Q2 2023
Recruitment Process Outsourcing (RPO) – Service Provider Compendium 2023	Q2 2023
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