

US Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2023

July 2023: Complimentary Abstract / Table of Contents



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- ▶ Google Cloud
- ▶ Healthcare Business Process
- ▶ Healthcare Information Technology
- ▶ HealthTech
- ▶ Human Resources
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing
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- ▶ IT Services Excellence
- ▶ IT Services Executive Insights™
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- ▶ Life Sciences Business Process
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- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ 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
- ▶ Trust and Safety
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Tracking: providers, locations,
risk, technologies

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sustainability, portfolios

Contents

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1. Introduction and overview	8
• Research methodology	9
• Key information on the report	10
• Background of the research	11
• Objective of the research	12
• Focus of the research	13
2. Summary of key messages	14
• US IT Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2023	15
• US Engineering Contingent Talent and Strategic Solutions PEAK Matrix Assessment 2023	16
• US Business and Professionals Contingent Talent and Strategic Solutions PEAK Matrix Assessment 2023	17
• US Industrial Contingent Talent and Strategic Solutions PEAK Matrix Assessment 2023	18
3. Service provider landscape	19
• Service provider landscape summary dashboard	20
• Service provider landscape by overall market share	21
• Service provider landscape by skill categories coverage	22
• Leaders vs. others- Performance on key parameters	23
4. US IT Contingent Talent and Strategic Solutions PEAK Matrix characteristics	25
• PEAK Matrix framework	26
• Everest Group PEAK Matrix for US IT Contingent Talent and Strategic Solutions	29
• US IT Contingent Talent and Strategic Solutions PEAK Matrix characteristics	30
• Characteristics of Star Performers	31
• Summary dashboard for Leaders, Major Contenders, and Aspirants	33

Contents

5. US Engineering Contingent Talent and Strategic Solutions PEAK Matrix characteristics	37
• Everest Group PEAK Matrix for US Engineering Contingent Talent and Strategic Solutions	38
• US Engineering Contingent Talent and Strategic Solutions PEAK Matrix characteristics	39
• Characteristics of Star Performers	40
• Summary dashboard for Leaders, Major Contenders, and Aspirants	41
6. US Business and Professionals Contingent Talent and Strategic Solutions PEAK Matrix characteristics	45
• Everest Group PEAK Matrix for US Business and Professionals Contingent Talent and Strategic Solutions	46
• US Business and Professionals Contingent Talent and Strategic Solutions PEAK Matrix characteristics	47
• Characteristics of Star Performers	48
• Summary dashboard for Leaders, Major Contenders, and Aspirants	50
7. US Industrial Contingent Talent and Strategic Solutions PEAK Matrix characteristics	54
• Everest Group PEAK Matrix for US Industrial Contingent Talent and Strategic Solutions	55
• US Industrial Contingent Talent and Strategic Solutions PEAK Matrix characteristics	56
• Summary dashboard for Leaders, Major Contenders, and Aspirants	57
8. Enterprise sourcing considerations	61
• Actalent	62
• Addison Group	64
• Adecco/LHH	66
• Advantage Resourcing	68
• Aerotek	70
• Airswift	72

Contents

• Akkodis	74
• Apex Systems	76
• Artech	78
• Aston Carter	80
• Bartech	82
• Beacon Hill Staffing	84
• Belcan	86
• Collabera	88
• Dexian	90
• Elwood Staffing	92
• Experis	94
• Express Employment Professionals	96
• Hays	98
• Innova Solutions	100
• Insight Global	102
• Integrity Staffing	104
• Kelly	106
• Kforce	108
• Korn Ferry	110
• Labor Finders	112
• Lorien	114

Contents

• Lyneer Staffing Solutions	116
• Manpower	118
• MAU Workforce Solutions	120
• Motion Recruitment	122
• NES Fircroft	124
• Nesco Resource	126
• NLB Services	128
• Ōnin Staffing	130
• Partners Personnel	132
• PeopleReady	134
• ProLogistix	136
• Randstad	138
• RemX	140
• ResourceMFG	142
• RGP	144
• Robert Half	146
• Rose International	148
• Select Staffing	150
• Spectraforce	152
• SRG	154
• Staffmark	156

Contents

• Surge Staffing	158
• Swoon	160
• System One	162
• TalentBurst	164
• TEKsystems	166
• The Judge Group	168
• Tradesmen International	170
• Yoh	172
9. Appendix	174
• Glossary	175
• Research calendar	176

Background of the research

After experiencing a significant surge in contingent talent demand post the pandemic, the contingent staffing industry in the US continued to experience growth in 2022 on account of the talent shortage. Enterprises continued to face a talent crunch in 2022 due to a skills shortage and the voluntary attrition of workers. Though the fears of an expected recession slowed down the trend, it did not invert the talent supply-demand gap. This continued the talent shortage in the US, which presented an opportunity for the Contingent talent and strategic solutions providers to fill the talent gap by investing to improve capabilities in areas such as technology-driven solutions, managed services, learning and upskilling, and Diversity, Equity, and Inclusion (DEI).

This report examines the dynamics of the contingent staffing provider landscape in the US and its impact on the US contingent staffing market in 2022 from the lens of IT staffing, engineering staffing, business and professionals staffing, and industrial staffing. It gives an overview of the market and analyzes the areas where service providers differentiate themselves based on the comprehensive Everest Group PEAK Matrix®.

In this research, we focus on:

- Everest Group's US IT Contingent Talent and Strategic Solutions PEAK Matrix evaluation, a comprehensive assessment of 28 Contingent talent and strategic solutions providers in the US
- Everest Group's US Engineering Contingent Talent and Strategic Solutions PEAK Matrix evaluation, a comprehensive assessment of 22 Contingent talent and strategic solutions providers in the US
- Everest Group's US Business and Professionals Contingent Talent and Strategic Solutions PEAK Matrix evaluation, a comprehensive assessment of 23 Contingent talent and strategic solutions providers in the US
- Everest Group's US Industrial Contingent Talent and Strategic Solutions PEAK Matrix evaluation, a comprehensive assessment of 21 Contingent talent and strategic solutions providers in the US
- Remarks on key strengths and limitations for each contingent staffing provider
- Service provider landscape

Scope of this report



Geography
The US



Providers
Coverage: across 56 staffing providers



Services
Contingent staffing

Overview and abbreviated summary of key messages

This report examines the US contingent talent and strategic solutions 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 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:

US IT Contingent Talent and Strategic Solutions PEAK Matrix® 2023

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 28 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** Apex Systems, Akkodis, Experis, Randstad Digital, Robert Half, and TEKsystems
- **Major Contenders:** Addison Group, Artech, Beacon Hill Staffing, Collabera, Dexian, Hays, Innova Solutions, Insight Global, Kelly Technology, Kforce, Korn Ferry, Lorien, Motion Recruitment, NLB Services, Spectraforce, The Judge Group, and Yoh
- **Aspirants:** Elwood Staffing, Nesco Resource, Rose International, Swoon, TalentBurs

US Engineering Contingent Talent and Strategic Solutions PEAK Matrix® 2023

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 22 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** Actalent, Akkodis, Kelly Engineering, and Manpower Engineering
- **Major Contenders:** Airswift, Artech, Bartech, Belcan, Hays, Insight Global, Nes Fircroft, Nesco Resource, Randstad, Spectraforce, SRG, System One, and Yoh
- **Aspirants:** Addison Group, Elwood Staffing, RGP, Rose International, and TalentBurst

US Business & Professionals Contingent Talent and Strategic Solutions PEAK Matrix® 2023

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

- **Leaders:** Adecco/LHH, Aston Carter, Kelly, Manpower, Randstad, and Robert Half
- **Major Contenders:** Addison Group, Artech, Beacon Hill Staffing, Dexian, Elwood Staffing, Express Employment Professionals, Insight Global, Integrity Staffing, Kforce, Randstad, RemX, Rose International
- **Aspirants:** Advantage Resourcing, Nesco Resource, Rose International, Swoon

US Industrial Contingent Talent and Strategic Solutions PEAK Matrix® 2023

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 21 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** Adecco, Aerotek, Express Employment Professionals, Kelly, Manpower, PeopleReady, Randstad
- **Major Contenders:** Elwood Staffing, Integrity Staffing, Lyneer Staffing Solutions, MAU Workforce Solutions, Onin Staffing, ProLogistix, ResourceMFG, Select Staffing, Staffmark, Tradesmen International
- **Aspirants:** Labor Finders, Nesco Resource, Partners Personnel, Surge Staffing

This study offers 9 distinct chapters providing a deep dive into key aspects of Contingent Staffing market; below are three charts to illustrate the depth of the report (page 1 of 4)



1 This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service providers' public disclosures, and interaction with buyers as well as inputs from providers including Akkodis, Artech, Experis, Kelly Technology, Korn Ferry, Motion Recruitment, NLB Services, Randstad Digital, Spectraforce, and TalentBurst
Source: Everest Group (2023)

Capability assessment *Illustrative example*

Measure of capability: 🕒 Low ● High

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

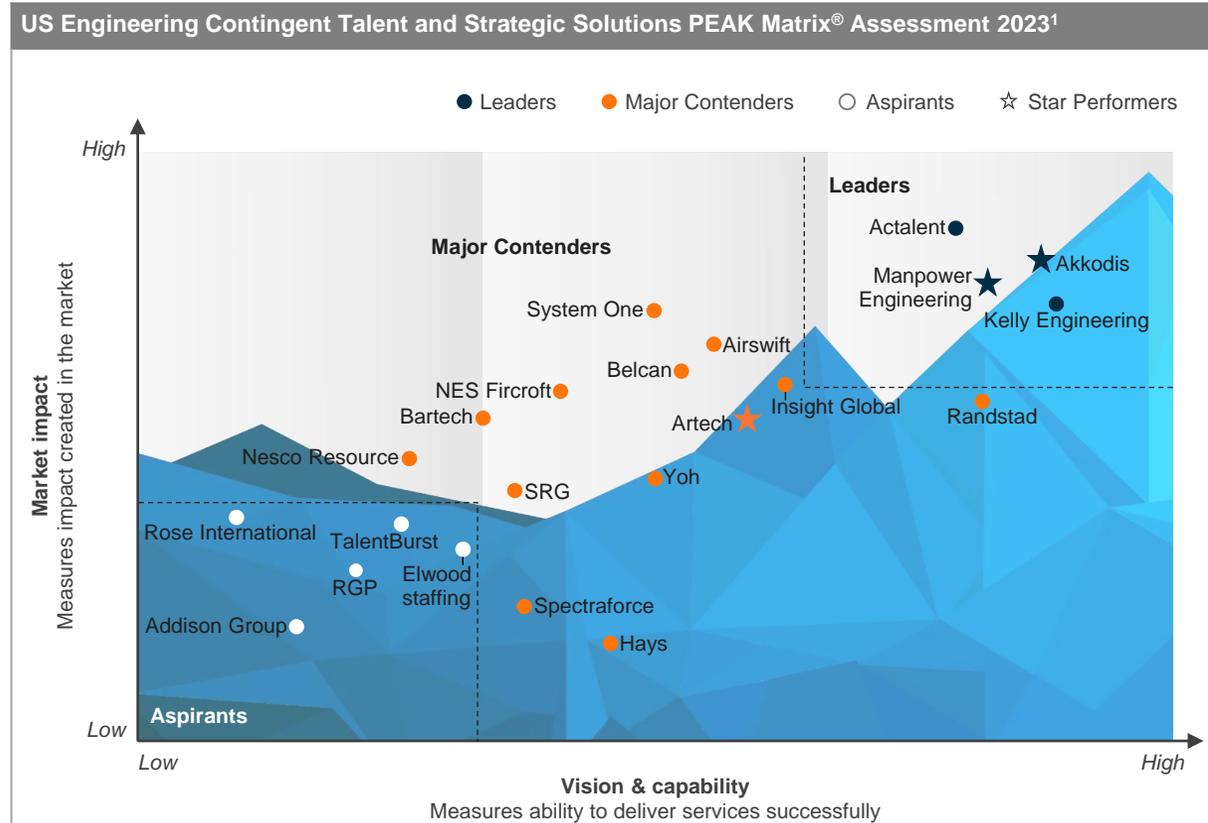
Strengths

- Provider is a US-based provider of consulting, staffing, and workforce solutions with a specialization in the IT domain. Over the years, it has made considerable investments to expand its industry reach and capabilities in domains beyond IT
- It has a diverse client portfolio with significant representation from financial services, consumer and industrials, healthcare, technology, media & telecom, and business & government services

Limitations

- Its technology stack is still developing. Mature clients looking for technology-driven contingent staffing services may need to evaluate its capabilities carefully
- While it does provide training services around soft skills, it still has to develop its capabilities in providing training services for hard skills

This study offers 9 distinct chapters providing a deep dive into key aspects of Contingent Staffing market; below are three charts to illustrate the depth of the report (page 2 of 4)



1 This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service providers' public disclosures, and interaction with buyers as well as inputs from providers including Actalent, Akkodis, Artech, Kelly Engineering, Manpower Engineering, Randstad, Spectraforce and TalentBurst
Source: Everest Group (2023)

Capability assessment Illustrative example

Measure of capability: 🕒 Low ● High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Innovation and investments	Scope of services	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

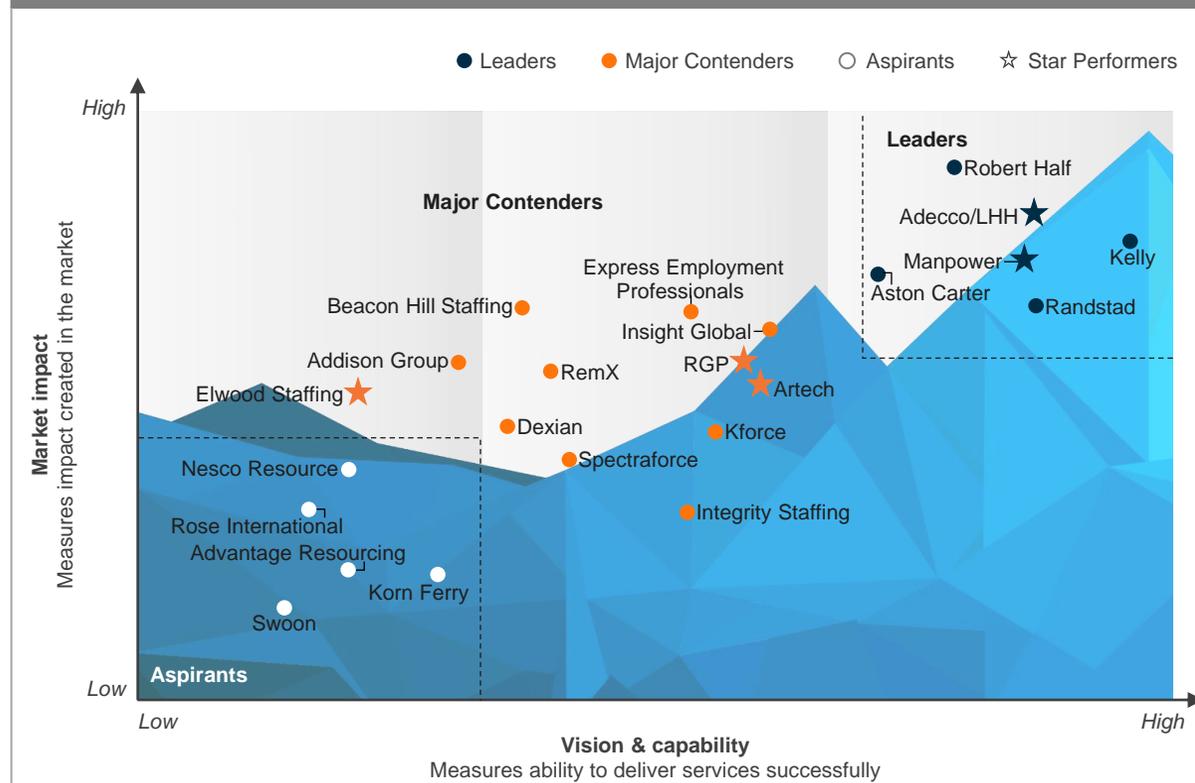
Measure of capability: 🕒 Low ● High

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

- | Strengths | Limitations |
|---|---|
| <ul style="list-style-type: none"> Provider has vast experience in catering to clients from energy and utilities. It specializes in engineering contingent staffing and developed robust capabilities to source talent for skills such as mechanical engineering, civil engineering, chemical engineering, and design It has strong vision for DEI and its evident by its investments on setting up internal councils and dedicated learning and management programs for the diverse talent | <ul style="list-style-type: none"> Its experience in sourcing talent for industries such as hi-tech and telecom, BFSI, healthcare, and public sector is limited. Clients from the same may need to carefully evaluate its capabilities Although it offers engineering project solutions and managed services, its market impact and breadth of its offerings is currently limited |

This study offers 9 distinct chapters providing a deep dive into key aspects of Contingent Staffing market; below are three charts to illustrate the depth of the report (page 3 of 4)

US Business and Professionals Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2023¹



1 This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service providers' public disclosures, and interaction with buyers as well as inputs from providers including Adecco/LHH, Artech, Kelly, Korn Ferry, Manpower, Randstad, and Spectraforce
Source: Everest Group (2023)

Capability assessment Illustrative example

Measure of capability: 🔄 Low ● High

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

Strengths

- Within the business and professionals space, provider has developed sourcing capabilities in finance and accounting, office/clerical, HR, and legal
- It continues to invest in developing capabilities in managed services. It currently offers these services in finance and HR

Limitations

- Provider's penetration in industries such as manufacturing, retail, and energy is currently limited. It is yet to make significant investments in managed services
- Its upskilling and reskilling services are limited and clients looking for the same may need to carefully evaluate its capabilities

This study offers 9 distinct chapters providing a deep dive into key aspects of Contingent Staffing market; below are three charts to illustrate the depth of the report (page 4 of 4)



1 This assessment is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, service providers' public disclosures, and interaction with buyers as well as inputs from providers including Adecco, Kelly, Manpower, and Randstad

2 ProLogistix, ResourceMFG, and Select Staffing were evaluated as separate brands under Employbridge

Source: Everest Group (2023)

Capability assessment Illustrative example

Measure of capability: 🔄 Low ● High

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

Strengths

- Provider is a US-based staffing company that leverages a franchise model for offering industrial contingent staffing, temp-to-hire, and direct hire staffing services
- It specializes in sourcing skilled and general labor for construction, manufacturing, production, maintenance, and hospitality and events industries. It also provides labor for certain niche pockets within these industries such as restoration, agriculture, landscaping, mining, and waste management

Limitations

- While it has developed capabilities to provide career and resume support, it has not built a comprehensive learning and skilling solution to upskill its associates
- While provider has developed an associate mobile application, the application has limited scale and functionalities. Additionally, there is limited evidence of the presence of a client portal/application for posting and managing job orders

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
UK Contingent Staffing Services PEAK Matrix® Assessment 2023	November 2022
Contingent Staffing Services State of the Market 2023	November 2022
Digital-led Staffing – An Overview Of Digital Platforms and Tools to Source and Retain Contingent Talent	March 2023
Decoding Managed Services for Staffing Providers: Navigating the Business Process Services (BPS) Landscape	March 2023
Decoding Managed Services for Staffing Providers: Navigating the IT Services Landscape	April 2023
US Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2023	July 2023
UK Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2023	Q3 2023
Contingent Staffing Services State of the Market 2023	Q4 2023

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