

UK Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2023

September 2023: Complimentary Abstract / Table of Contents



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Background of the research

The contingent staffing industry in the UK experienced significant developments and transformations throughout 2021 and 2022. In 2022, enterprises faced the enduring challenges of difficult macroeconomic conditions and the anticipation of an impending recession. Additionally, they grappled with a talent crunch caused by a scarcity of skills and voluntary attrition among workers. Service providers responded by focusing on upskilling and reskilling initiatives to bridge the skills gap and empowering workers with the necessary competencies. Service providers also increased their focus on inclusive talent acquisition through targeted outreach, inclusive job descriptions, unbiased screening processes, and actively partnering with organizations promoting DEI initiatives. Technology played a crucial role in shaping the contingent staffing industry during this period. Service providers increasingly utilized digital platforms and tools to streamline their operations, improve candidate sourcing and selection processes, and enhance workforce management. Technology-enabled solutions, such as AI-powered candidate matching and online talent marketplaces, gained prominence, offering more efficient and effective ways to connect employers with contingent workers.

This report examines the dynamics of the contingent talent and strategic solutions landscape in the UK and its impact on the UK contingent staffing market in 2022 under the lens of IT staffing and business and professionals 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 UK IT Contingent Talent and Strategic Solutions PEAK Matrix® evaluation, a comprehensive assessment of 17 contingent talent and strategic solutions providers in the UK
- Everest Group's UK Business and Professionals Contingent Talent and Strategic Solutions PEAK Matrix® evaluation, a comprehensive assessment of 16 contingent talent and strategic solutions providers in the UK
- Remarks on key strengths and limitations for each contingent talent and strategic solutions provider
- Service provider landscape

Scope of this report



Geography
The UK



Providers
Coverage: across 25 staffing providers



Services
Contingent staffing

Overview and abbreviated summary of key messages

This report examines the UK 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:

UK IT Contingent Talent and Strategic Solutions PEAK Matrix® 2023

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 17 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

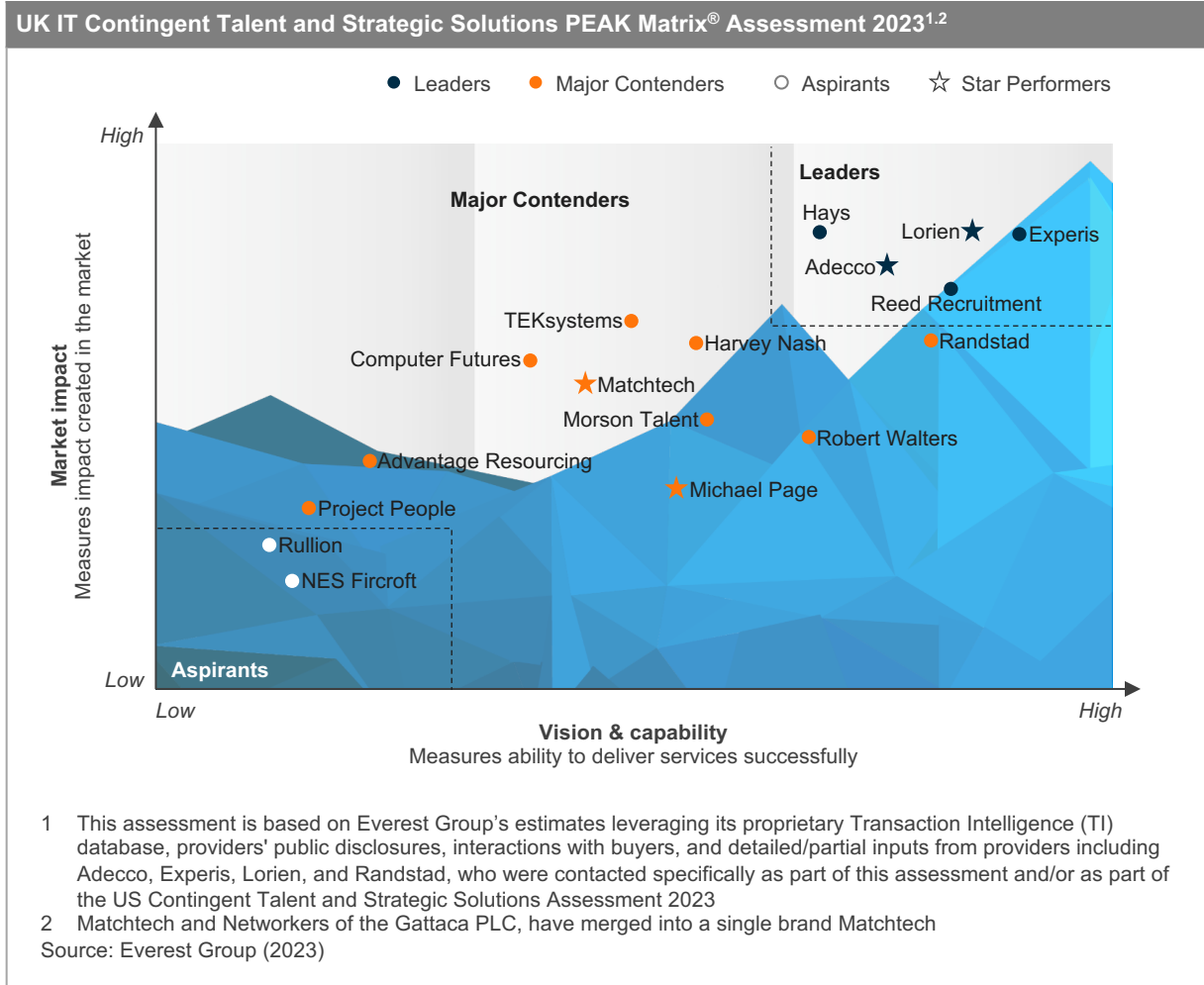
- **Leaders:** Adecco, Hays, Experis, Lorien, and Reed Recruitment
- **Major Contenders:** Advantage Resourcing, Computer Futures, Harvey Nash, Matchtech, Michael Page, Morson Talent, Randstad, Robert Walters, and TEKsystems
- **Aspirants:** NES Fircroft, Project People, and Rullion

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

Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, the 16 established contingent staffing service providers evaluated are segmented into three categories (in alphabetical order within each category):

- **Leaders:** Adecco, Hays, Manpower, Randstad, and Reed Recruitment
- **Major Contenders:** Aston Carter, BarclayMeade, Blue Arrow, Michael Page, Morson Talent, Pertemps, and Robert Walters
- **Aspirants:** Orion Group, Project People, and Tate Recruitment

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 (page 1 of 2)



1 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, Lorien, and Randstad, who were contacted specifically as part of this assessment and/or as part of the US Contingent Talent and Strategic Solutions Assessment 2023
2 Matchtech and Networkers of the Gattaca PLC, have merged into a single brand Matchtech
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	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

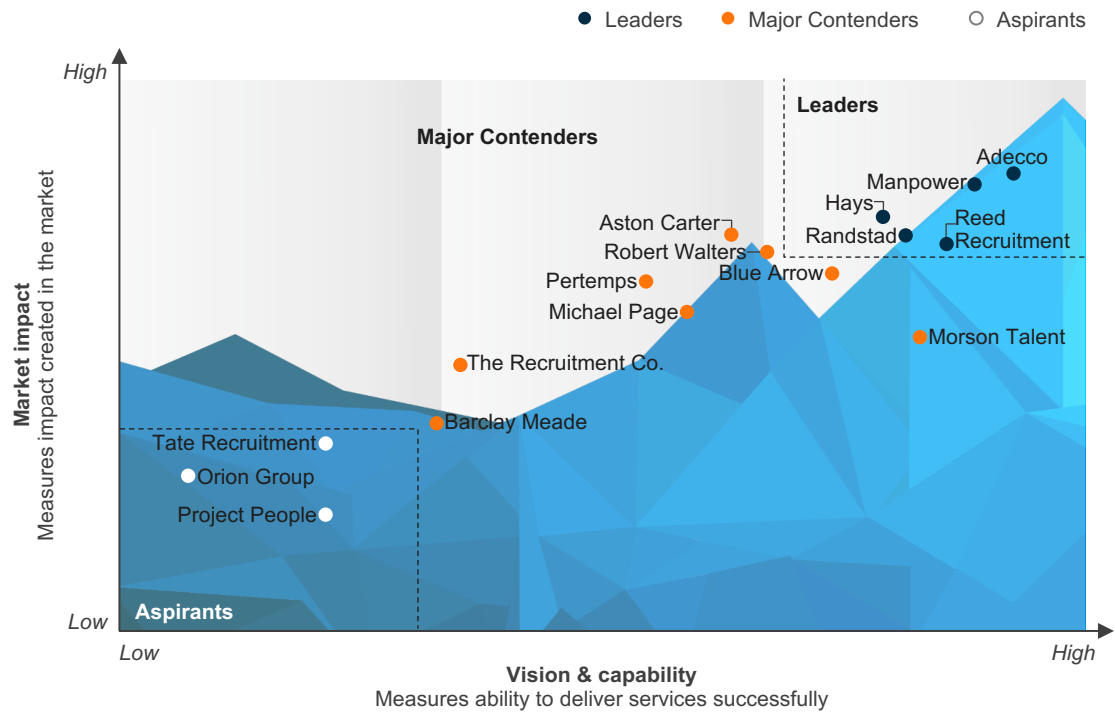
- Provider is one of the leading IT staffing providers globally and has strong presence in the UK. It offers contingent staffing, permanent placement (direct hire), and managed services
- Within the IT staffing space, it has developed capabilities to source talent for application services, infrastructure services, data services, automation services, and next-generation/emerging technologies

Limitations

- Provider's penetration and market success in sectors such as media, pharma, and life sciences is limited; clients looking for such services may need to evaluate its capabilities carefully
- It continues to broaden its managed services portfolio; however, it is yet to make significant investments to develop a strong partner ecosystem and IP/solutions to seamlessly deliver complex services at scale and speed

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 (page 2 of 2)

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



1 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, Manpower, and Randstad, who were contacted specifically as part of this assessment and/or as part of the US Contingent Talent and Strategic Solutions Assessment 2023
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	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 largest UK-based workforce solutions providers, offering a wide range of services including contingent staffing, permanent staffing, outplacement, facilities management, and VMS solutions
- Provider effectively sources talent across the business and professionals domains, leveraging its extensive experience in administration, secretarial, credit control, customer service, finance, and HR

Limitations

- A majority of provider's experience comes from serving clients in the public sector, healthcare, and manufacturing industries. Clients from other industries such as hi-tech and telecom, life sciences, energy, and media may have to evaluate its capabilities carefully
- While it offers apprenticeship programs to its clients, it is yet to develop a comprehensive learning and skilling solution and clients looking to offer well-defined training and upskilling services to associates may need to carefully evaluate its capabilities

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	September 2023
Contingent Staffing Services State of the Market 2023	Q4 2023

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