



Recruitment Process Outsourcing (RPO) Services PEAK Matrix[®] Assessment 2024 – Global

May 2024: Complimentary Abstract / Table of Contents

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- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Microsoft Azure
- ▶ Microsoft Business Application Services
- ▶ Modern Application Development (MAD)
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
- ▶ Payer and Provider Business Process
- ▶ Payer and Provider Information Technology
- ▶ Price Genius – AMS Solution and Pricing Tool
- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
- ▶ Procurement and Supply Chain
- ▶ Recruitment
- ▶ Retail and CPG IT Services
- ▶ 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
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Introduction

2023 presented significant challenges for enterprises, as they navigated an uncertain talent environment amid the macro-economic and geopolitical uncertainty. Although RPO providers faced a challenging year in terms of demand for their services, they stepped up by providing tailored and customized services to address the need for greater agility and innovated in-the-face rapid technology advances to support their clients in emerging needs for skills-based recruitment and generative AI. The year also marked the expansion of consulting and value-added services, with RPO providers addressing strategic needs such as workforce planning, upskilling/reskilling, and graduate and early-careers hiring.

This report examines the dynamics of the global RPO provider landscape and the impact that providers have created in 2023. It gives an overview of the market and analyzes the areas where providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix® evaluation, RPO providers are segmented

into the categories of Leaders, Major Contenders, Aspirants, and Star Performers in the corresponding PEAK Matrix®.

This report includes the profiles of the following 32 leading global providers featured on the 2024 RPO PEAK Matrix:

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

Scope of this report

Geography: Global

Industry: All

Services: Recruitment Process Outsourcing (RPO)

Overview and abbreviated summary of key messages

This report examines the dynamics of the global RPO provider landscape and the impact that providers have created in 2023. It gives an overview of the market and analyzes the areas where providers differentiate themselves.

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

Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2024 – Global

- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 32 established RPO providers evaluated are segmented into three categories (in alphabetical order within each category):
 - **Leaders:** AMS, Cielo, Korn Ferry, PeopleScout, Randstad Sourceright, Talent Solutions RPO, and WilsonHCG
 - **Major Contenders:** ADP RPO, Allegis Global Solutions, Career International, DZConneX, Engage2Excel, Hays, Hudson RPO, Hueman RPO, IBM, KellyOCG, LevelUP HCS, NXTThing RPO, Page Outsourcing, Pierpoint International, Pontoon Solutions, PSG Global Solutions, Resource Solutions, Sevenstep, and Taggd
 - **Aspirants:** AgileOne, AMN Healthcare, Hire Velocity, NES Advantage, NLB Services, and RGF Staffing

RPO service provider capability overview

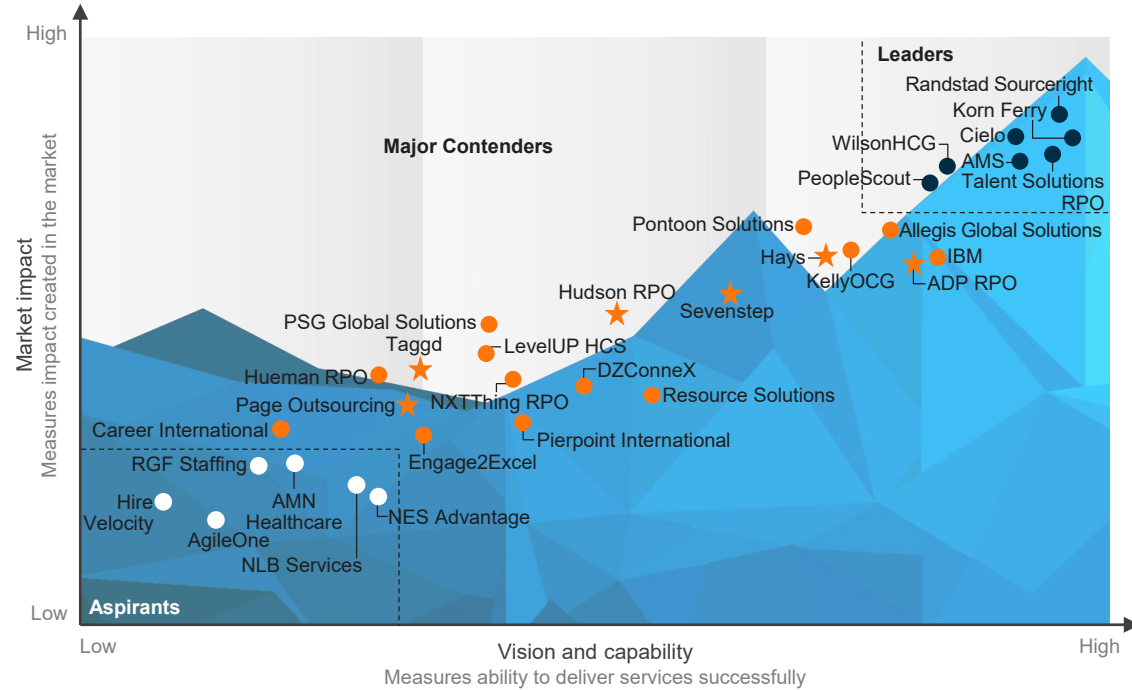
- Everest Group delineates each of the service providers' strengths and limitations
- The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

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

Everest Group PEAK Matrix® Assessment 2024

Everest Group Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2024 – Global¹

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers



¹ Assessments for AgileOne, Career International, DZConneX, Hire Velocity, Pierpoint International, and RGF Staffing 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 (2024)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

| Providers | Market impact | | | | Vision and 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 | ○ | ○ | ● | ● | ● | ○ | ○ | ● | ○ |

Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

| | Market impact | | | | Vision and 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
- It 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

Research calendar

Recruitment

| | Published | Current release | Planned |
|--|--------------|-----------------|---------------|
| Reports title | Release date | | |
| 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 Manufacturing | | | June 2023 |
| Maneuvering through Talent Challenges in Healthcare | | | June 2023 |
| Maneuvering through Talent Challenges in Consumer Brands and Retail | | | June 2023 |
| Maneuvering through Talent Challenges in Life Sciences | | | June 2023 |
| Recruitment Process Outsourcing (RPO) Services – Provider Compendium 2023 | | | August 2023 |
| Smart Trends Moving Talent and Business Forward | | | November 2023 |
| Introduction to the Skills Intelligence Technology Landscape | | | April 2024 |
| The Skills Intelligence Technology Landscape: Focus on Talent Acquisition | | | May 2024 |
| The Skills Intelligence Technology Landscape: Focus on Talent Management | | | May 2024 |
| Recruitment Process Outsourcing (RPO) PEAK Matrix® Assessment 2024 – Global | | | May 2024 |
| Recruitment Process Outsourcing (RPO) PEAK Matrix® Assessment 2024 – North America, EMEA, and Asia Pacific | | | Q2 2024 |
| Recruitment Process Outsourcing (RPO) Services – Provider Compendium 2024 | | | Q2 2024 |
| Recruitment State of the Market 2024 | | | Q2 2024 |
| Candidate Engagement and Experience Platforms (CEEP) PEAK Matrix® Assessment 2024 | | | Q3 2024 |

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