



Recruitment Process Outsourcing (RPO) Services PEAK Matrix[®] Assessment 2024 – North America, EMEA, and Asia Pacific

August 2024: Complimentary Abstract / Table of Contents

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- ▶ Microsoft Azure
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- ▶ 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
- ▶ Talent Genius™
- ▶ Technology Skills and Talent
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Introduction

As Recruitment Process Outsourcing (RPO) is gaining adoption across the globe, there is an ever-increasing demand for regional expertise and consistent delivery across the geographies.

The year 2023 was one of ambiguous and turbulent market conditions. Enterprises looked for flexibility, adaptability, and scalability from their RPO providers. Regional domain expertise tied with a consultative approach and augmented by technology was the key to delivering maximum value.

This report examines the dynamics of the North America, EMEA, and Asia Pacific 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 a comprehensive assessment of 50+ RPO providers featured on the 2024 RPO PEAK Matrix® – North America, EMEA, and Asia Pacific:

ADP RPO, Advanced RPO, AgileOne, Allegis Global Solutions, AMN Healthcare, AMS, Aspirant, Boyd and Moore Executive Search, Results, Career International, Cielo, Compagnon, Diamondpick, Engage2Excel, enPower, Exela Technologies, 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, RPO, Orion Talent, Page Outsourcing, Peoplefy, Pierpoint International, Pontoon Solutions, PSG Global Solutions, Quess Corp, Randstad Sourceright, Robert Walters, RGF Staffing, Serendi, Sevenstep, Sterksen, Taggd, Talent Solutions RPO, WilsonHCG

Scope of this report

Geography: North America, EMEA, Asia Pacific

Industry: All

Services: Recruitment Process Outsourcing (RPO)

Overview and abbreviated summary of key messages

This report examines the dynamics of the RPO provider landscape across North America, EMEA, and Asia Pacific 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 – North America

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

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

- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the established RPO 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
 - Major Contenders: Allegis Global Solutions, IBM, Hudson RPO, KellyOCG, LevelUP HCS, Lorien Global, NES Advantage, Page Outsourcing, PeopleScout, Pontoon Solutions, Robert Walters, Serendi, Sevenstep, and WilsonHCG
 - Aspirants: Compagnon, Gattaca Solutions, Instant Impact, Morson Talent, RGF Staffing, and Sterksen

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

- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the established RPO 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
 - Major Contenders: Career International, Cielo, Harrier Talent Solutions, Hudson RPO, IBM, KellyOCG, NLB Services, PeopleScout, Pontoon Solutions, PSG Global Solutions, Robert Walters, RGF Staffing, Taggd, and WilsonHCG
 - Aspirants: Boyd and Moore Executive Search, Diamondpick, enPower, Exela Technologies, Page Outsourcing, Peoplefy, and Qess Corp

RPO service provider capability overview

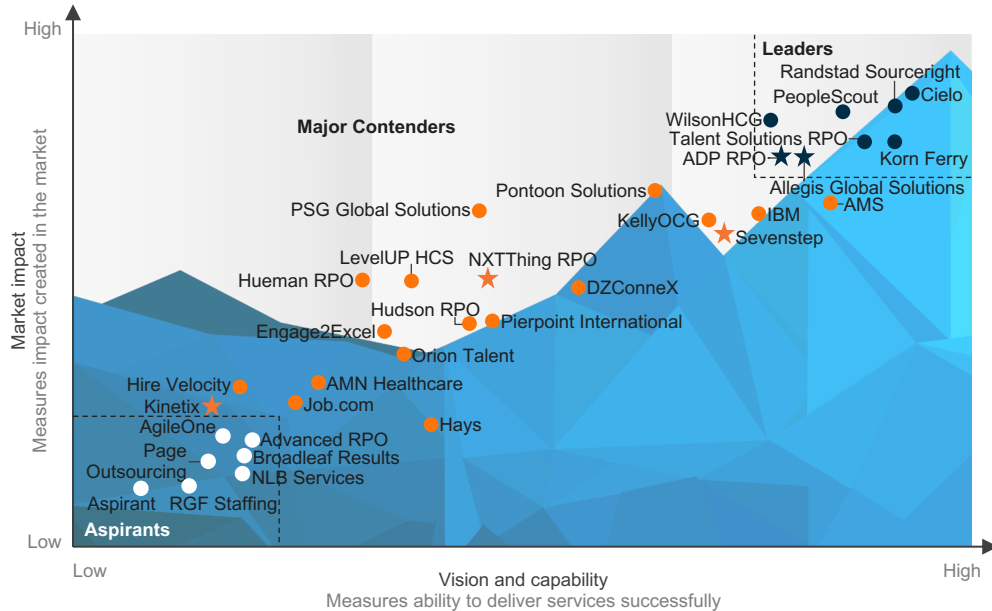
- Everest Group delineates each of the service providers' strengths and limitations
- The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

This study offers distinct chapters providing a deep dive into key aspects of North American 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 2024¹ – North America

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers



¹ Assessments for Aspirant, Advanced RPO, AgileOne, DZConneX, Hire Velocity, Job.com, Orion Talent, Pierpoint International, and RGF Staffing exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosure 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 adoption	Market impact				Vision and capability				
	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall	
○	●	●	●	●	●	○	○	○	●

Strengths

- Provider 1 has a strong foothold in the region with expertise in engaging with larger market buyers
- It has strong capabilities across manufacturing, BFSI, and pharmaceuticals and life sciences domains

Limitations

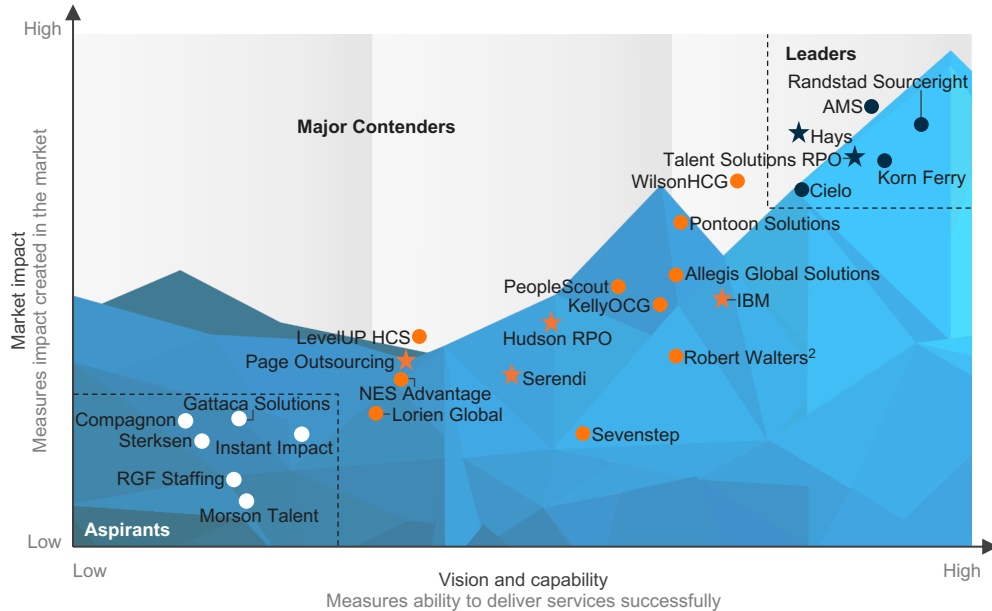
- Provider 1 has limited experience in executing single-country engagements in the region
- Industries such as hi-tech and telecom, government / public sector, and energy and utilities constitute a small part of Provider 1' portfolio. It has limited experience in sourcing life sciences and call center professionals

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 PEAK Matrix® Assessment 2024

Everest Group Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2024¹ – EMEA

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers



1 Assessments for Compagnon, Gattaca Solutions, Morson Talent, RGF Staffing, and Sterksen exclude 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

2 Resource Solutions is now integrated into Robert Walters
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

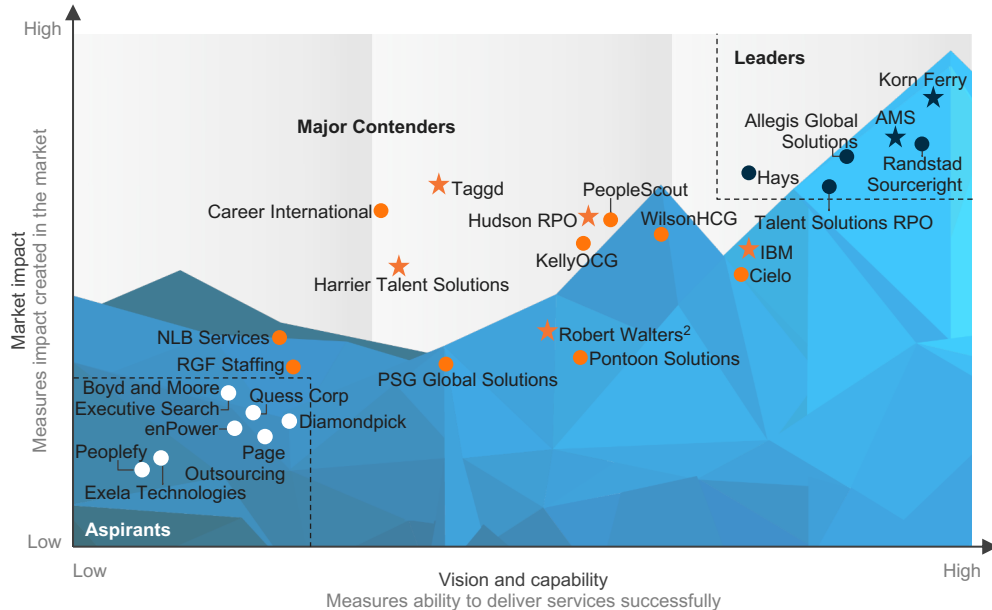
- Despite its global footprint, Provider 1 has limited experience in hiring in the Middle East and Africa region
- Its buyer portfolio is centered around a few key industries, and it lacks exposure to sectors such as hi-tech and telecom, retail, and healthcare

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 PEAK Matrix® Assessment 2024

Everest Group Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2024¹ – Asia Pacific

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers



¹ Assessments for Boyd and Moore Executive Search, Career International, and enPower exclude 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

² Resource Solutions is now integrated into Robert Walters
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 significant footprint in India and delivers RPO services through its multiple offices and shared service centers across the country
- It has expertise in serving large-market buyers from hi-tech and telecom and BFSI industries and hiring white-collar IT and call center professionals

Limitations

- Provider 1 is not present outside of India in the Asia Pacific region, limiting its ability to execute multi-country deals. Buyers have highlighted the lack of presence in Japan and China as a limitation for Provider 1
- Considering its predominant focus on the hi-tech and telecom industry, its capabilities to serve buyers from other industries remain largely untested

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			August 2024
Recruitment Process Outsourcing (RPO) Services – Provider Compendium 2024			Q3 2024
Recruitment State of the Market 2024			Q3 2024
Candidate Engagement and Experience Platforms (CEEP) PEAK Matrix® Assessment 2024			Q3 2024

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