



US Contingent Talent and Strategic Solutions PEAK Matrix[®] Assessment 2024 – IT, Engineering, and Business and Professionals

July 2024: Complimentary Abstract / Table of Contents

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- ▶ 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
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Introduction

In 2023, as enterprises in the US grappled with the challenges of cost and margin pressures amid an economic slowdown, the US professional contingent talent and strategic solutions market experienced a deceleration. However, the year experienced contrasting dynamics within the market. While the economic downturn had adverse effects on US staffing providers, there persisted a substantial ongoing gap in talent supply and demand. This gap was fueled by the rising demand for specialized skills in high-growth industry sectors, an increased need for managed services, and technological interventions by providers. Additionally, the expectations of enterprises from professional contingent talent providers have evolved. They now extend beyond transactional engagements, showing a growing interest in strategic solutions and managed services.

This report examines the dynamics of the professional contingent staffing provider landscape in the US and its impact on the US professional contingent staffing market in 2023 from the lens of contingent talent and strategic solutions in the domains of IT, engineering, and business and professional skills. 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 30 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 23 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 24 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

Industry: Coverage across 40+ US professional contingent staffing and strategic solutions providers

Services: Contingent staffing

Overview and abbreviated summary of key messages

Overview

This report examines the US IT, engineering, and business and professionals contingent talent and strategic solutions provider landscape and its impact on the contingent staffing market. It focuses on provider position, 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® 2024

Based on Everest Group's PEAK Matrix evaluation, the 30 established IT contingent staffing service providers are segmented into three categories (listed alphabetically 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/Softworld, Kforce, Korn Ferry, Lancesoft, Lorien, Motion Recruitment, NLB Services, Pyramid Consulting, Spectraforce, TalentBurst, The Judge Group, and Yoh
- Aspirants: Elwood Staffing, Nesco Resource, Rose International, and Swoon

US Engineering Contingent Talent and Strategic Solutions PEAK Matrix® 2024

Based on Everest Group's PEAK Matrix evaluation, the 23 established engineering contingent staffing service providers are segmented into three categories (listed alphabetically within each category):

- Leaders: Actalent, Akkodis, Kelly Engineering, and Manpower Engineering
- Major Contenders: Airswift, Artech, Bartech, Belcan, Hays, Insight Global, Lancesoft, 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® 2024

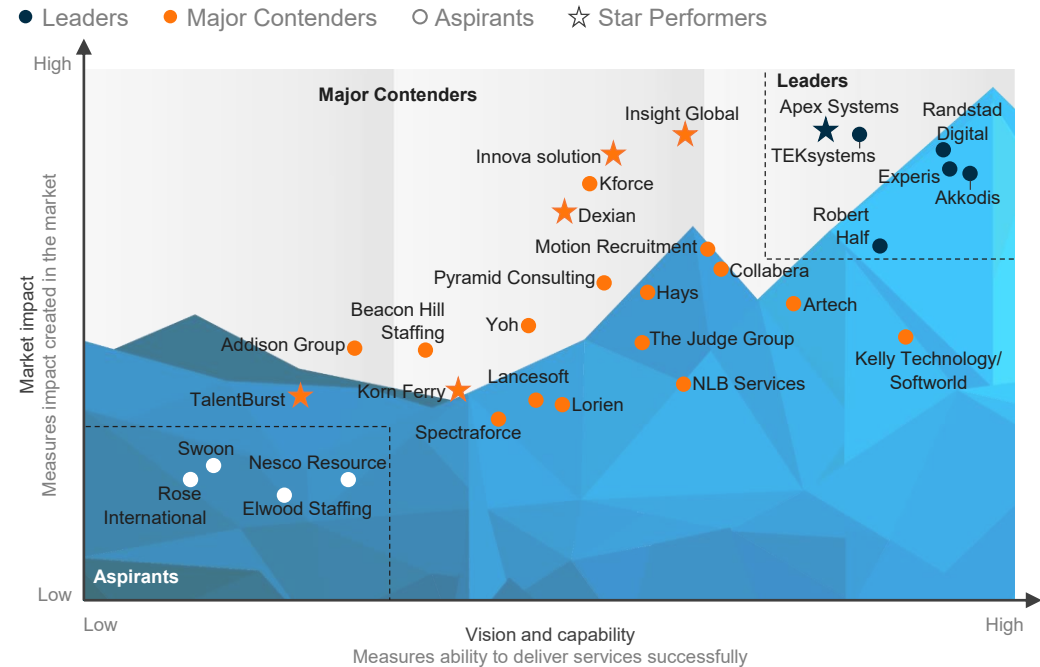
Based on Everest Group's PEAK Matrix evaluation, the 24 established business and professionals contingent staffing service providers are segmented into three categories (listed alphabetically within each category):

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

This study offers seven distinct chapters providing a deep dive into key aspects of US Contingent Talent and Strategic Solutions market; below are three charts to illustrate the depth of the report (page 1 of 3)

Everest Group PEAK Matrix® Assessment 2024

Everest Group US IT Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024^{1,2}



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, Insight Global, Kelly Engineering, Lancesoft, Manpower Engineering, Randstad Digital, Spectraforce and TalentBurst
 2 Analysis for Kelly Technology/Softworld and Motion Recruitment is based on capabilities before Kelly’s acquisition of Motion Recruitment in 2024
 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 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

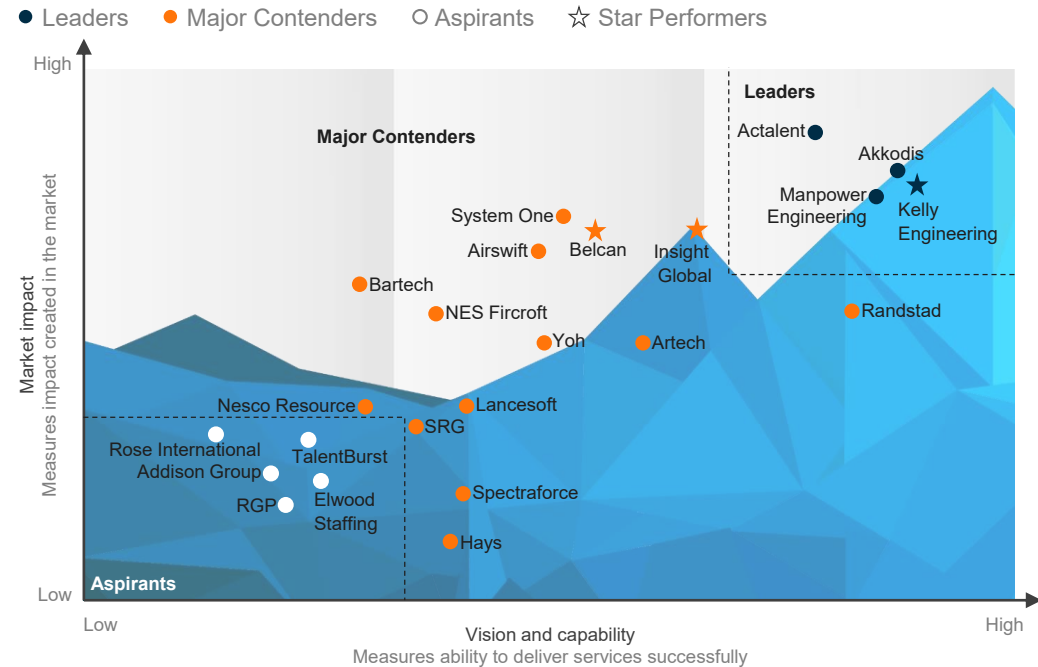
Limitations

- Peers are ahead of provider with their success stories on solutions and services developed for next-generation private equity themes such as sustainability and risk assessment
- Lags peers in having a well-defined investment roadmap to expand its offerings into more business domains such as due diligence, deal evaluation, and exit analysis

This study offers seven distinct chapters providing a deep dive into key aspects of US Contingent Talent and Strategic Solutions market; below are three charts to illustrate the depth of the report (page 2 of 3)

Everest Group PEAK Matrix® Assessment 2024

Everest Group US Engineering Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024¹



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, Insight Global, Kelly Engineering, Lancesoft, Manpower Engineering, Randstad, Spectraforce and TalentBurst
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 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

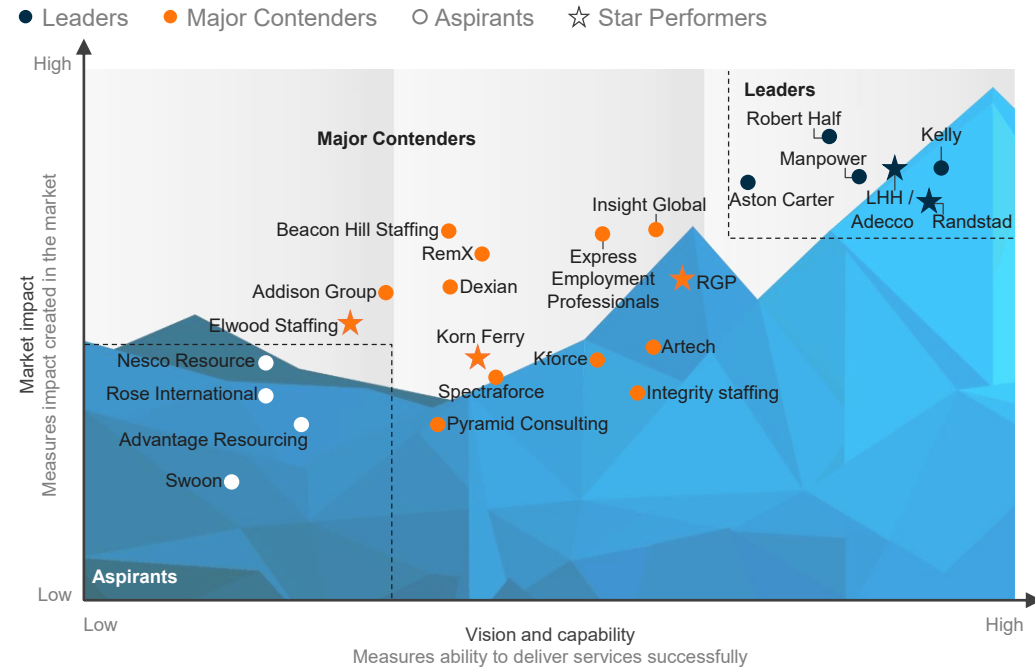
Limitations

- 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 seven distinct chapters providing a deep dive into key aspects of US Contingent Talent and Strategic Solutions market; below are three charts to illustrate the depth of the report (page 3 of 3)

Everest Group PEAK Matrix® Assessment 2024

Everest Group US Business and Professionals Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024¹



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 Artech, Insight Global, Kelly, Korn Ferry, LHH/Adecco, Manpower, Randstad, and Spectraforce
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

- 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

Research calendar

Contingent Staffing

	Published	Current release	Planned
Reports title	Release date		
Contingent Talent and Strategic Solutions State of the Market 2023 – Elevating Efficiency and Experience to Navigate Uncertain Times			December 2023
Internal Talent Mobility			January 2024
Avionté Acquires SimpleVMS: Forging an End-to-End Integrated Platform for Contingent Talent Acquisition and Management			January 2024
Talent Demand Trends India IT Services – H2 2023			February 2024
Steering into the Wind: Future-proofing Your Talent Strategy for the BFSI Industry			March 2024
Technology Talent Playbook for IT Service Providers – Key Game Changers to Drive Next-generation IT Talent Readiness			March 2024
Introduction to the Skills Intelligence Technology Landscape			April 2024
The Skills Intelligence Technology Landscape: Focus on Talent Management			April 2024
The Skills Intelligence Technology Landscape: Focus on Talent Acquisition			May 2024
Staffing Software Spotlight: Exploring the Prominent Staffing Software (ATS) Providers			July 2024
US Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024 – IT, Engineering, and Business and Professionals			July 2024
US Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024 – Industrial			Q3 2024
UK Contingent Talent and Strategic Solutions PEAK Matrix® Assessment 2024			Q3 2024
Workforce as a Service: Emergence of Online Staffing Platforms			Q4 2024
Contingent Staffing State of the Market Report 2024			Q4 2024
Talent Providers to Strategic Partners: Redefining the Role of Contingent Staffing Providers			Q4 2024

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