Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix® Assessment 2021

April 2021: Complimentary Abstract / Table of Contents

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Contents

For more information on this and other research
published by Everest Group, please contact us:

Arkadev Basak, Vice President

Aniruddha Kulkarni, Practice Director

Karneek Patel, Senior Analyst

Sailesh Hota, Senior Analyst

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Contents

Contents

Background of the research

The RPO market was one of the fastest growing outsourcing markets till 2019. In 2020, the industry saw a major disruption on account of the pandemic with permanent hiring falling drastically across the globe. Despite these circumstances, service providers showed resilience and used the adversity as an opportunity to focus on improvements such as remote delivery of services, process automation, and integration of technologies.

This report examines the dynamics of the global RPO service provider landscape and its impact on the RPO market in 2020. It gives an overview of the market and analyzes the areas wherein service providers differentiate themselves. Based on the comprehensive Everest Group PEAK Matrix® evaluation, each of the 28 RPO service providers are segmented into Leaders, Major Contenders, Aspirants, and Star Performers.

In this research, we focus on:

- Everest Group's Services PEAK Matrix® evaluation, a comprehensive assessment of 28 RPO service providers
- 2020 RPO PEAK Matrix® and Star Performers
- Service provider delivery capability assessment
- Remarks on key strengths and areas of improvement for each RPO service provider
- Service provider landscape

Scope of this report:

Geography
Global

Service providers
Coverage[1]: Across 28 RPO service providers with multi-process capability including ADP RPO, AgileOne, Allegis Global Solutions, AMN Healthcare, AMS, Broadleaf Results, Career International, Cielo, Engage2Excel, FlexAbility, Hays Talent Solutions, Hire Velocity, Hudson RPO, IBM TAO, KellyOCG, Korn Ferry RPO, LevelUP HCS, Morson Talent, Orion Talent RPO Solutions, PeopleScout, Pierpoint International, Pontoon Solutions, Randstad Sourceright, Resource Solutions, Sevenstep, Talent Solutions RPO (ManpowerGroup), WilsonHCG, and Yoh/DZConneX

Services
Recruitment Process Outsourcing (RPO)

1   While we considered a much bigger list of RPO providers, these 28 RPO providers are shortlisted based on their presence and meaningful play in the RPO space

Overview and abbreviated summary of key messages

This report examines the global 2007 HRO service provider landscape and its impact on the HRO market. It focuses on service provider position and growth in the HRO market, changing market dynamics and emerging service provider trends, assessment of service provider delivery capabilities, and key HRO service provider profiles. It also identifies the key implications of the research findings for buyers and service providers.

Some of the findings in this report, among others, are:
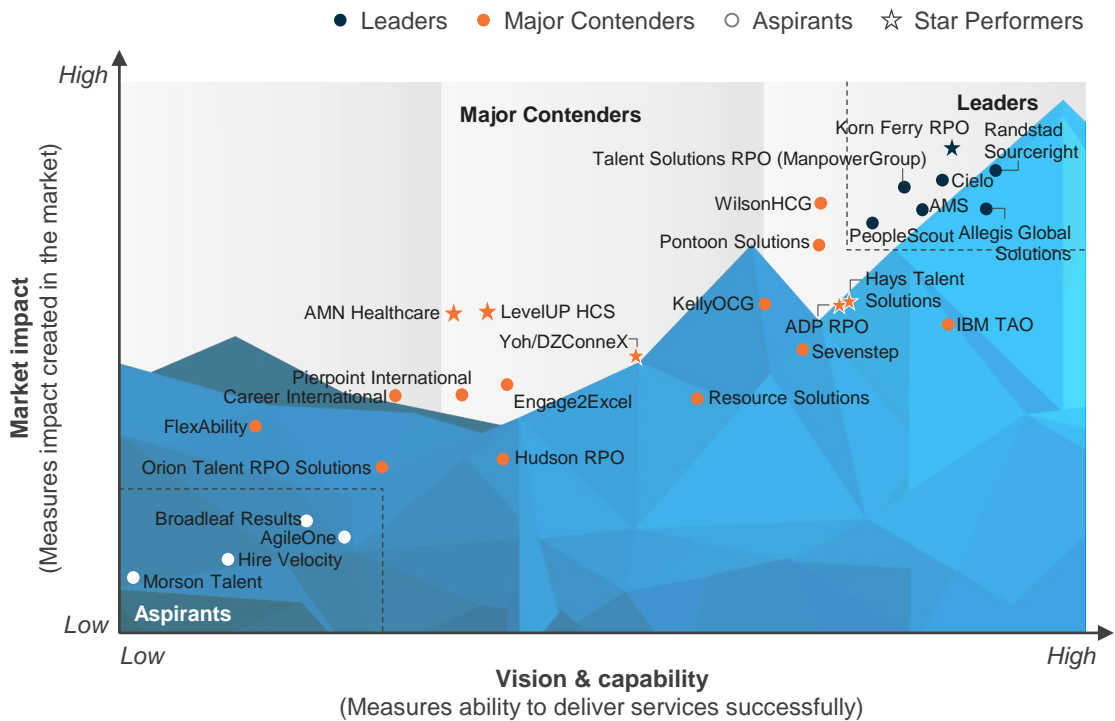
RPO PEAK Matrix 2021

- Everest Group classifies RPO service providers based on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix®, the 25 established RPO service providers evaluated are segmented into three categories (in alphabetical order within each category):
  - **Leaders:** Allegis Global Solutions, AMS, Cielo, Korn Ferry RPO, PeopleScout, Randstad Sourceright, and Talent Solutions RPO (ManpowerGroup)
  - **Major Contenders:** ADP RPO, AMN Healthcare, Career International, Engage2Excel, FlexAbility, Hays Talent Solutions, Hudson RPO, IBM Talent Acquisition Optimization (IBM TAO), KellyOCG, LevelUP HCS, Orion Talent RPO Solutions, Pierpoint International, Pontoon Solutions, Resource Solutions, Sevenstep, WilsonHCG, and Yoh/DZConneX
  - **Aspirants:** AgileOne, Broadleaf Results, Hire Velocity, Morson Talent
  - Everest Group also identified the following providers as Star Performers based on their year-over-year movement on the PEAK Matrix (in alphabetical order): ADP RPO, AMN Healthcare, Hays Talent Solutions, Korn Ferry RPO, LevelUP HCS, and Yoh/DZConneX

RPO service provider commentary

- Everest Group delineates each of the 28 service providers' strengths and areas of improvement
- 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 two distinct chapters providing a deep dive into key aspects of RPO market; below are three charts to illustrate the depth of the report

Recruitment Process Outsourcing (RPO) Services PEAK Matrix® Assessment 2021[1,2]

Illustrative example

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers

Market impact
(Measures impact created in the market)

High

Major Contenders

Leaders

Korn Ferry RPO
Randstad Sourceright ★
Talent Solutions RPO (ManpowerGroup)
Cielo
WilsonHCG ●
AMS
Pontoon Solutions ●
PeopleScout Allegis Global Solutions

Hays Talent Solutions
AMN Healthcare ★ ★ LevelUP HCS
KellyOCG ●
Yoh/DZConneX
ADP RPO ★
IBM TAO
Sevenstep ●

Pierpoint International
Career International ●
Engage2Excel ●
Resource Solutions ●

FlexAbility ●

Orion Talent RPO Solutions ●
Hudson RPO ●

Aspirants
Broadleaf Results ●
AgileOne ●
Hire Velocity ○
Morson Talent ○

Low

Low — **Vision & capability** (Measures ability to deliver services successfully) — High

Capability assessment

Illustrative example

Measure of capability: ● High ◔ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1	◕	◔	◑	◕	◑	◔	●	◕	◑
Service provider 2	◔	◑	◑	◑	◔	◑	◕	◑	◔
Service provider 3	◑	◕	◕	◕	●	◑	◕	◕	◑
Service provider 4	◕	●	◕	◑	●	◑	●	◑	◑
Service provider 5	◕	◑	◕	◕	◑	◕	●	◑	◑
Service provider 6	◕	◑	◑	◕	◑	◕	●	◕	◑
Service provider 7	◑	◕	◑	◑	◑	◑	●	◑	◑
Service provider 8	◑	◔	◑	◑	◕	◕	◔	◑	◑
Service provider 9	◔	◔	◕	◑	◕	◑	◑	◑	◔

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ◔ Low

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
- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement
- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

1 Service providers scored using Everest Group's proprietary scoring methodology given on page 23 in its main report
2 Assessment for AgileOne, Career International, Hire Velocity and Hudson RPO excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with RPO buyers

Source: Everest Group (2021)

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Research calendar
Recruitment Process Outsourcing (RPO)

Flagship RPO reports	Release date
Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	April 2020
Recruitment Process Outsourcing (RPO) in North America – Service Provider Landscape with Services PEAK Matrix® Assessment 2020	June 2020
Navigating the Waves of a Global Pandemic: Recruitment Process Outsourcing (RPO) State of the Market Report 2020	October 2020
Recruitment Process Outsourcing (RPO) – Service Provider Landscape with Services PEAK Matrix® Assessment 2021	**April 2021**
Recruitment Process Outsourcing (RPO) in North America Services PEAK Matrix® Assessment 2021	Q2 2021
Recruitment Process Outsourcing (RPO) – Service Provider Compendium 2021	Q2 2021
RPO State of the Market Report 2021	Q2 2021
Outplacement and Career Transition Services PEAK Matrix	Q3 2021

Thematic RPO reports	Release date
The Concept of Ideal Talent – A Game-Changer in Talent Management	December 2019
Unlocking the Digital Potential in Talent Acquisition	January 2020
Impact of Recession on the Business Process Services (BPS) Industry	March 2020
Recruitment Process Outsourcing (RPO) in Europe: Charging Through Heterogeneity	September 2020
Outplacement Services – A Key Ingredient in the Age of Digital Disruption to the Workforce	February 2021
RPO 4.0	Q2 2021
Multi-country RPO	Q2 2021

Note: For a list of all of our published RPO reports, please refer to our website page

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Dallas (Headquarters)	**London**
info@everestgrp.com	unitedkingdom@everestgrp.com
+1-214-451-3000	+44-207-129-1318
Bangalore	**New York**
india@everestgrp.com	info@everestgrp.com
+91-80-61463500	+1-646-805-4000
Delhi	**Toronto**
india@everestgrp.com	canada@everestgrp.com
+91-124-496-1000	+1-647-557-3475