



Market Analysis

HR & Talent Transformation

RPO: Building the Future-Proof Workforce

Report Abstract

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Who is This Market Analysis For?

NelsonHall's RPO: Building the Future-Proof Workforce report is a comprehensive market assessment report designed for:

- Sourcing managers investigating sourcing developments within the RPO market
- Vendor marketing, sales, and business managers developing strategies to target RPO services
- Financial analysts and investors specializing in the RPO services sector.

Key Findings & Highlights

This report focuses on how vendors' product and service offerings are evolving to optimize recruiting processes and reimagine the candidate's experience. It examines the application of advanced technologies, including GenAI, to support TA transformation and details RPO vendors' current capabilities and planned service and product roadmaps.

The impacts of economic instability will likely prevail until H2 2025, as recruiting volumes and outsourcing engagements begin rebounding to normal. However, RPO vendors reported notable business development opportunities and prospect engagement increases in Q4 2024, potentially signaling improved economic conditions. Buyer decision-making remains impeded by various factors, including geopolitical conflicts, ongoing inflationary and recessionary concerns, and the actions of recently elected government administrations. These influences generate business uncertainty, yielding extended procurement cycles and volatile program requirements.

With the negative to modest growth experienced in 2024, vendors introduced new product and service offerings aligned with buyers' stated challenges and budget constraints. Modular RPO offerings increased, addressing clients' immediate needs and targeted hiring requirements, providing options for smaller, cost-effective solutions with shorter performance periods. Leading RPO transformation projects included employee lifecycle and recruitment process optimization, recruitment marketing, employee skilling/reskilling initiatives, and strategic workforce planning in anticipation of upcoming retirement horizons and evolving workforce roles impacted by technology.

The competitive global labor market is a primary factor driving modernization projects, as buyers seek solutions to reduce employee turnover, introduce advanced technologies into all facets of work, and optimize tech investments. Vendors and buyers are selectively applying advanced technologies, including GenAI, within recruitment and employee lifecycle processes to increase efficiency and candidate quality without negatively impacting candidate engagement or satisfaction. The introduction and rapid evolution of GenAI is driving vendors to innovate and rapidly balance ethical risks against industry regulations associated with the responsible use and application of technology.

Scope of the Report

The report analyzes the worldwide market for RPO and addresses the following questions:

- What are the market size and projected growth for the RPO market by geography?
- What is the industry sector's activity profile in the RPO services market?
- What are the top drivers for adopting RPO services?
- What benefits are achieved by RPO users?
- What factors are inhibiting user adoption of RPO services?
- Who are the leading RPO vendors globally and by geography?
- What is the typical combination of existing and new services provided within RPO services contracts?
- What is the current delivery location pattern used for RPO services contracts, and how are these models changing?
- What are the challenges and success factors within the RPO services market?

RPO Vendor Assessments are Available for:

ADP

Advanced RPO

Cielo

Hudson RPO

IBM

Instant Impact

Korn Ferry

Lorien

NLB Services

NXTThingRPO

Page Outsourcing

PeopleScout

Sanderson

Talent Solutions RPO.

About The Author

Jeanine is a Principal Research Analyst at NelsonHall and an HR Technology & Services practice member. She has global responsibility for crucial HR areas, including employer of record (EOR) and learning platforms.

Jeanine is a highly experienced HR practitioner with 28 years of experience across industry sectors, including aerospace, automotive, energy, government, pharmaceuticals, telecommunications, learning, and business consultancy.

Jeanine has significant experience leading and managing business transformation/integration, competitive and industry benchmarking, HR and learning technology, strategic change leadership, managed service provider engagements, organizational and process redesign, and M&A initiatives.

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About NelsonHall

NelsonHall is the leading global analyst firm dedicated to helping organizations understand the 'art of the possible' in digital operations transformation. With analysts in the U.S., U.K., and Continental Europe, NelsonHall provides buy-side organizations with detailed, critical information on markets and vendors (including NEAT assessments) that helps them make fast and highly informed sourcing decisions. For vendors, NelsonHall provides deep knowledge of market dynamics and user requirements to help them hone their go-to-market strategies. NelsonHall's research is based on rigorous, primary research and is widely respected for the quality, depth, and insight of its analysis.

We would be pleased to discuss how we can benefit your organization. You can contact us via the following relationship manager: Guy Saunders at guy.saunders@nelson-hall.com.

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