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The VMS/MSP Competitive Landscape: The State of The Industry

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Presented by:

Tony Gregoire
Senior Research Analyst
Staffing Industry Analysts

Jason Ezratty
Managing Partner,
Brightfield Strategies, LLC

Bryan Peña
VP, Contingent Workforce Strategies and Research
Staffing Industry Analysts

November 15, 2012
10 am PT/ 1 pm ET

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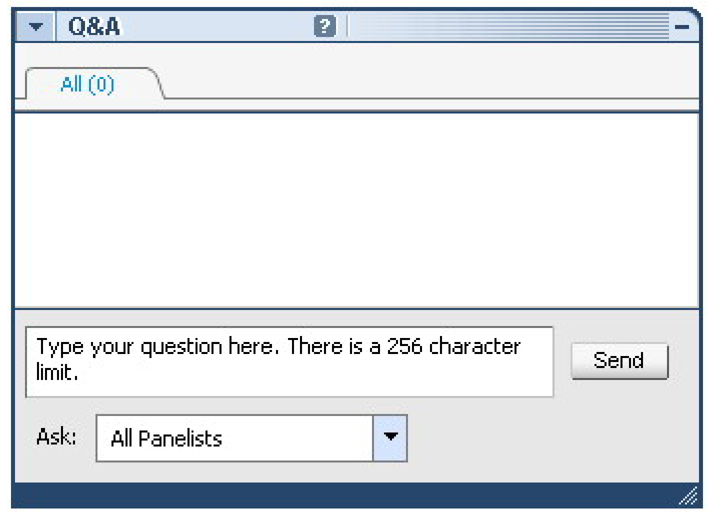

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About Staffing Industry Analysts

Staffing Industry Analysts is the global advisor on contingent work

- **Over 700 firms benefit from our international research services**
  - 19 of the world's 25 largest staffing firms are members
  - More than 60 buyers of contingent labor are members of our CWS Council, representing over $100 billion in annual contingent workforce spend
  - Customers in more than 25 countries
- **Founded in 1989**
  - Acquired by Crain Communications ($200M media conglomerate) in 2008
  - Headquartered in Mountain View, California and London, England
  - 80+ years of industry and advisory service experience among executive team

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CWS Summit Berlin 2013

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SAVE THE DATE!

Contingent Workforce Strategies Summit

May 15-16, 2013

Andel's Hotel | Berlin, Germany

www.cwssummitwe.eu

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CW Solutions Forum and CWSC Summit Chicago 2013

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Contingent Workforce Solutions Forum
September 10, 2013

Contingent Workforce Strategies Summit
September 11-12, 2013

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Randy Crews
Executive Vice President

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Our Speakers Today

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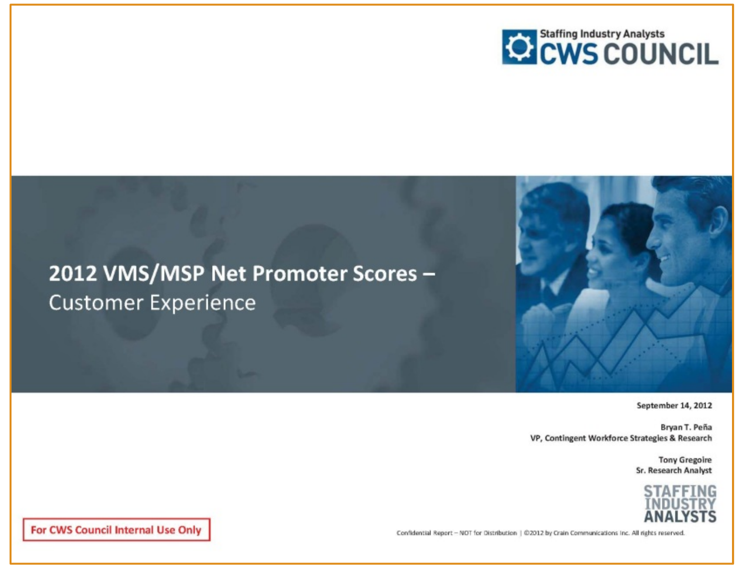

2012 LANDSCAPE SPEND AND CUSTOMER EXPERIENCE REPORTS

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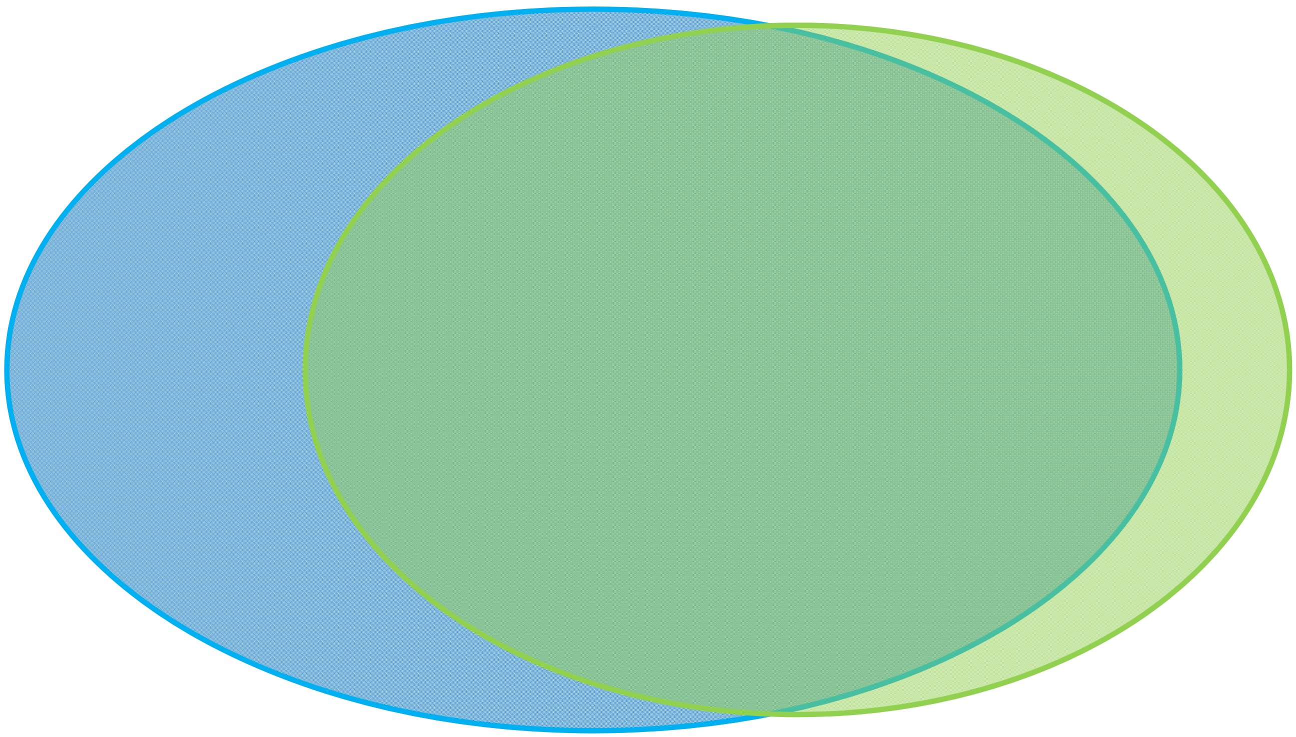
2011 VMS/MSP spend accounted for in study

VMS/MSP: $100 Billion

VMS: $91.9 Billion

MSP: $62.5 Billion



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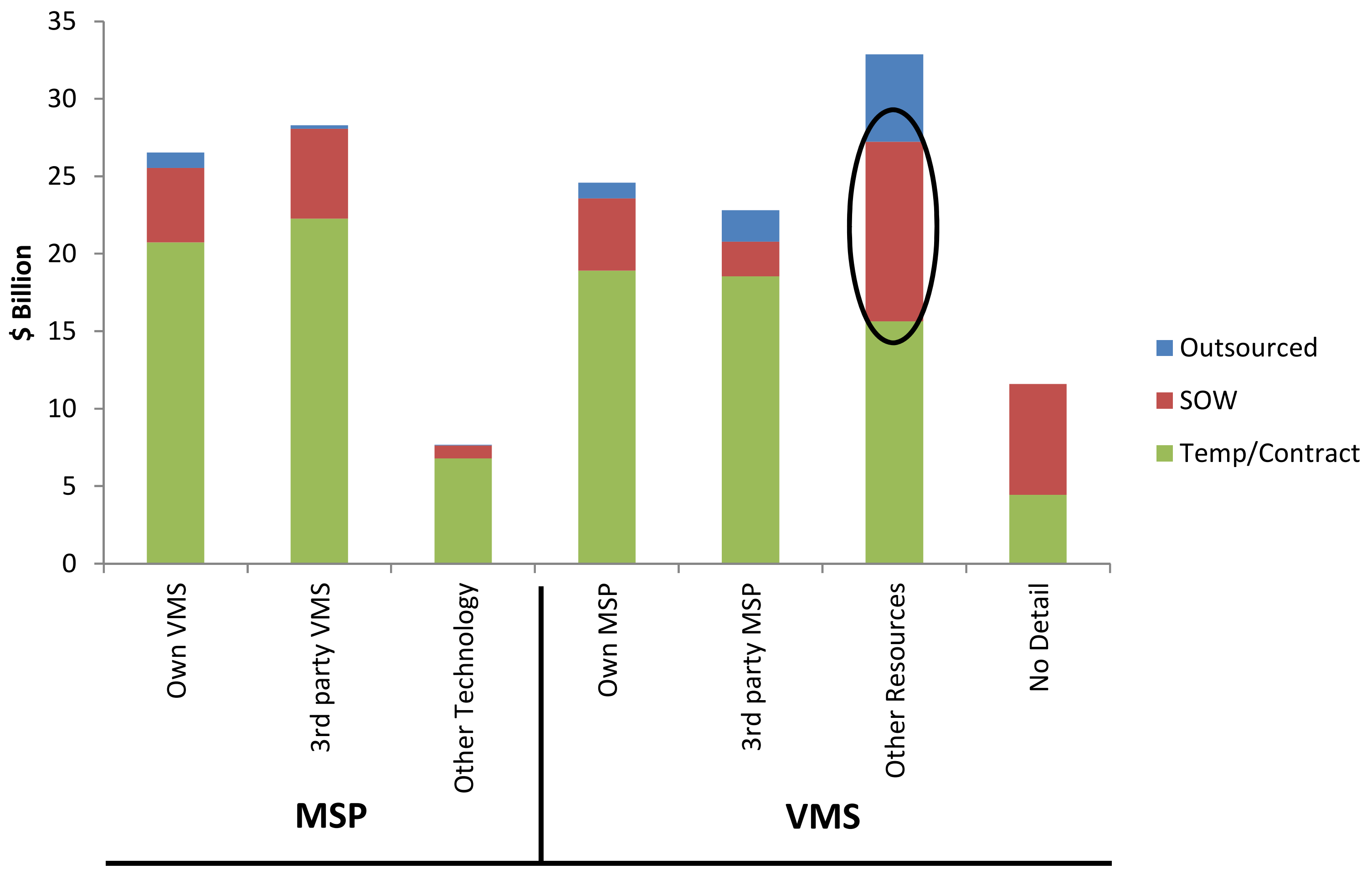
Source: SIA 2012 VMS/MSP Competitive Landscape Report

MSP and VMS by worker classification and platform



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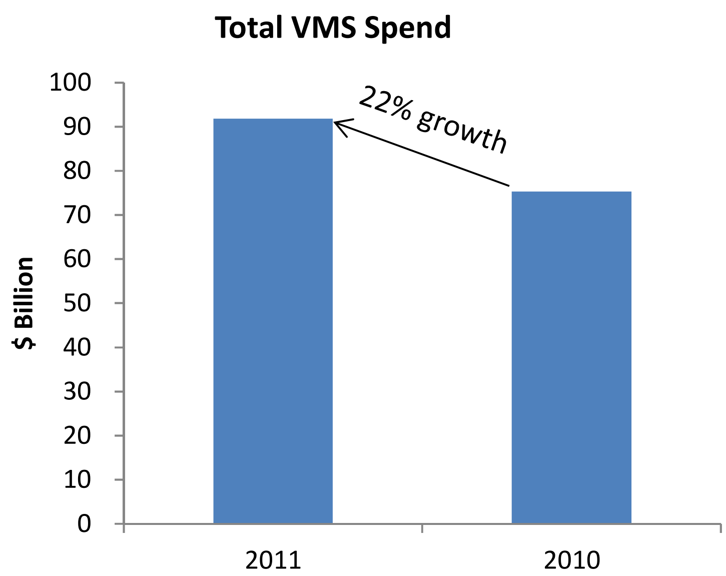
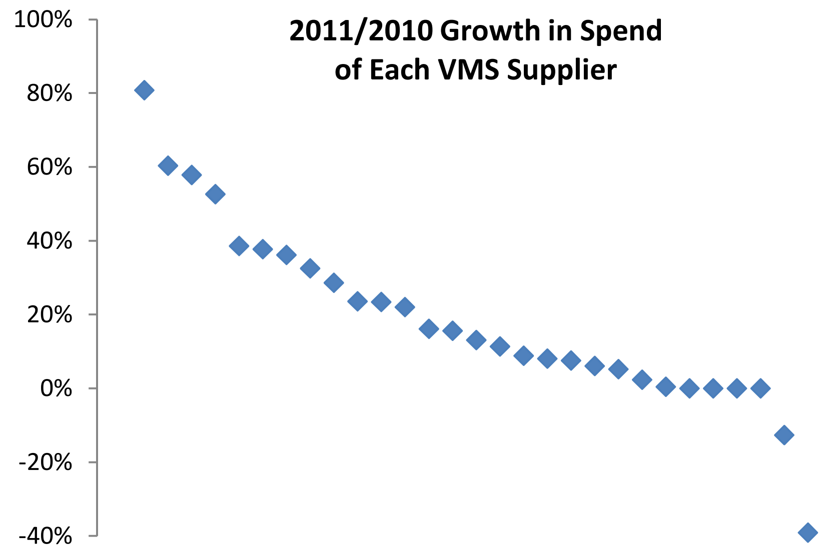
Source: SIA 2012 VMS/MSP Competitive Landscape Report

Continued surge, but disparity, in VMS market





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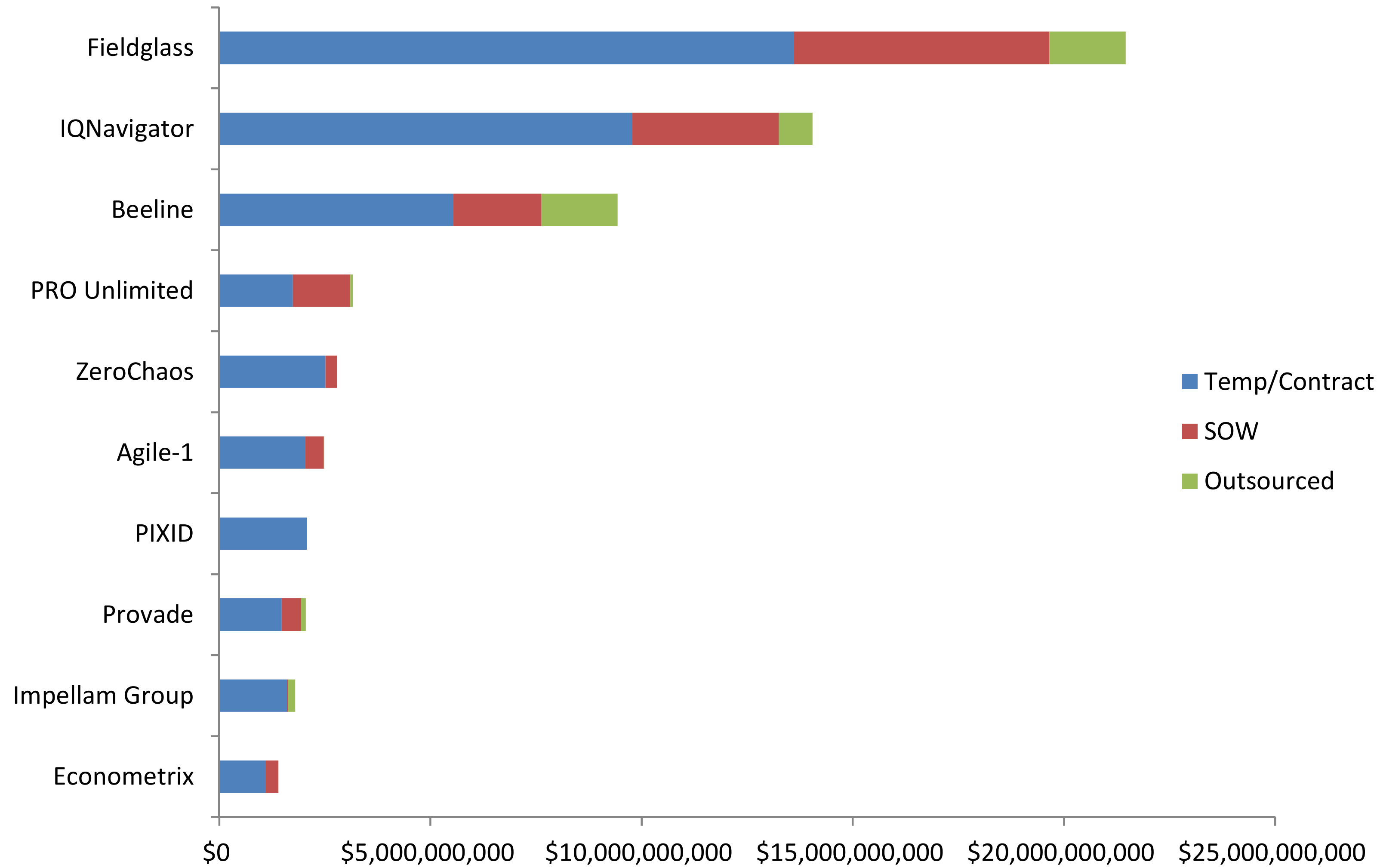
Source: SIA 2012 VMS/MSP Competitive Landscape Report

Largest 10 VMS providers by 2011 global spend



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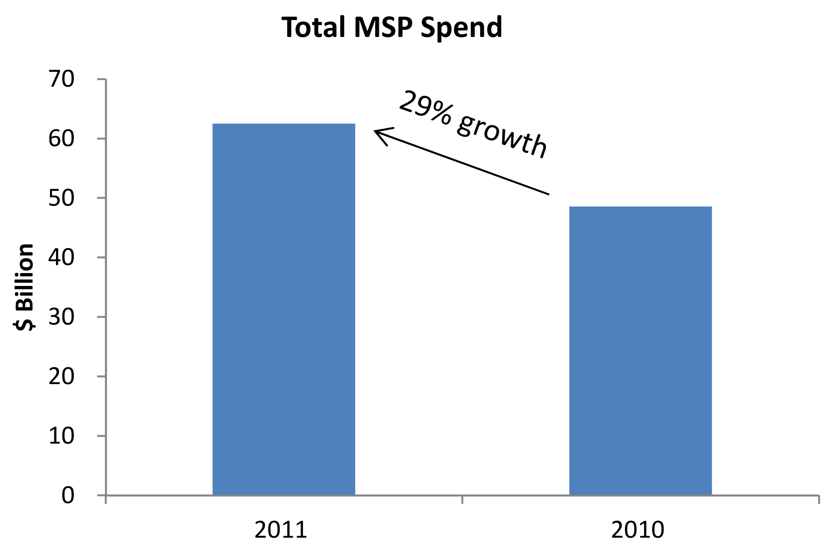
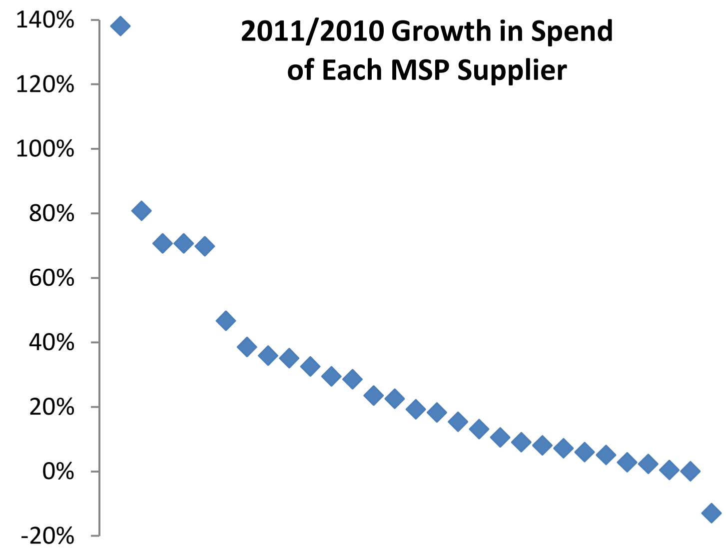
29% growth in MSP market





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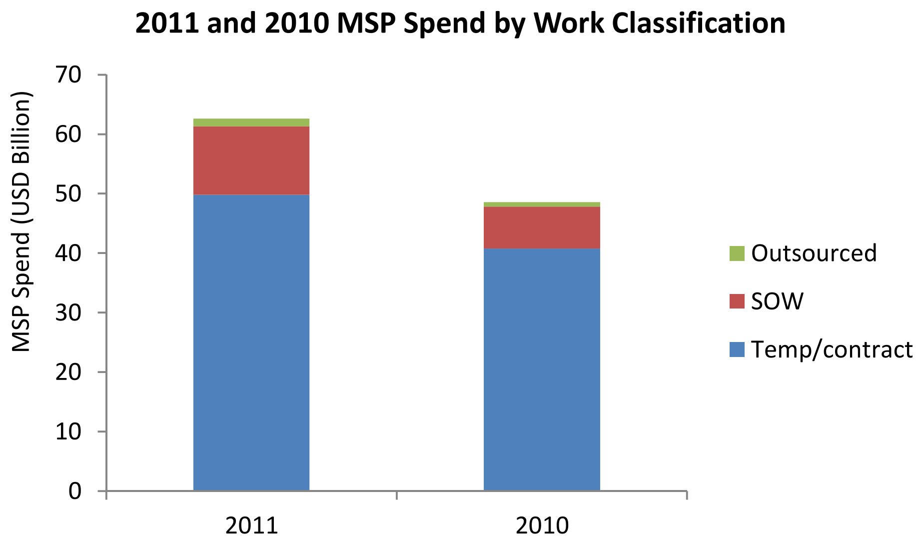
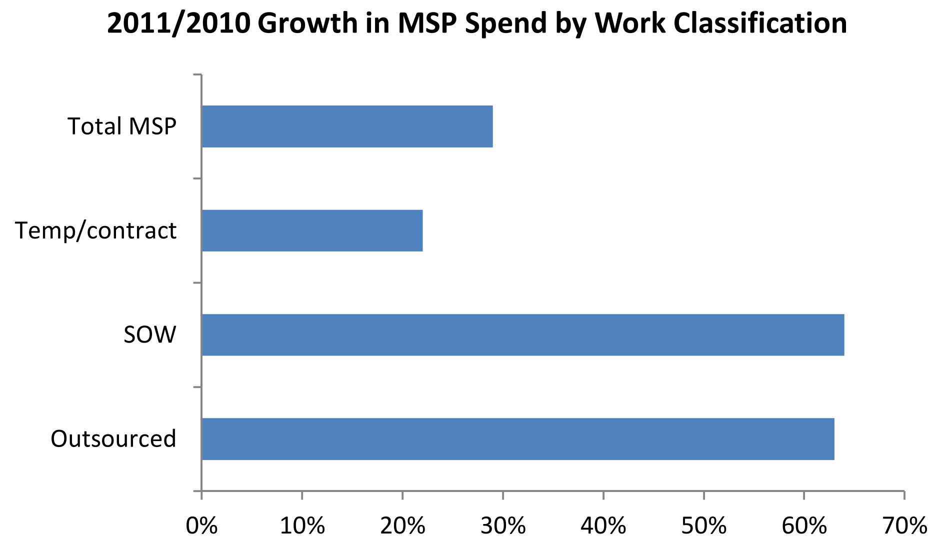
Temp/contract and SOW boost MSP spend





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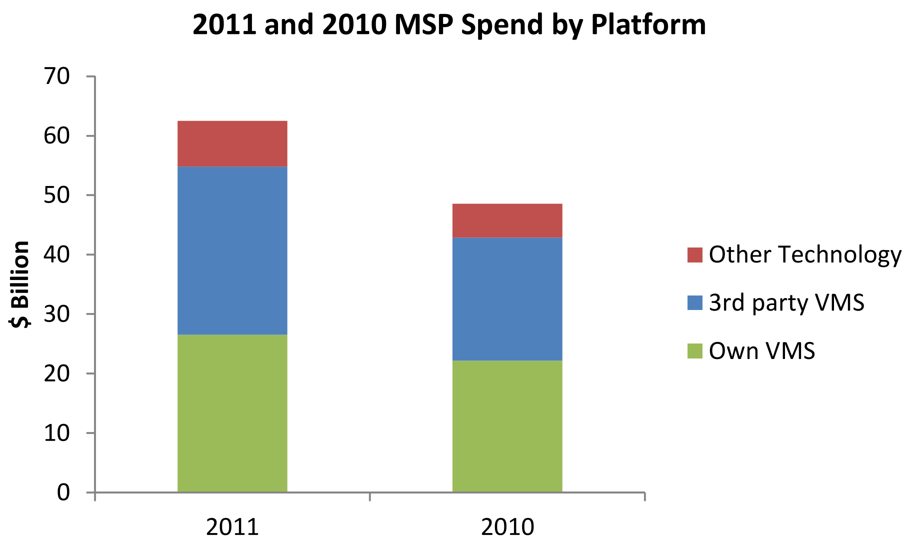
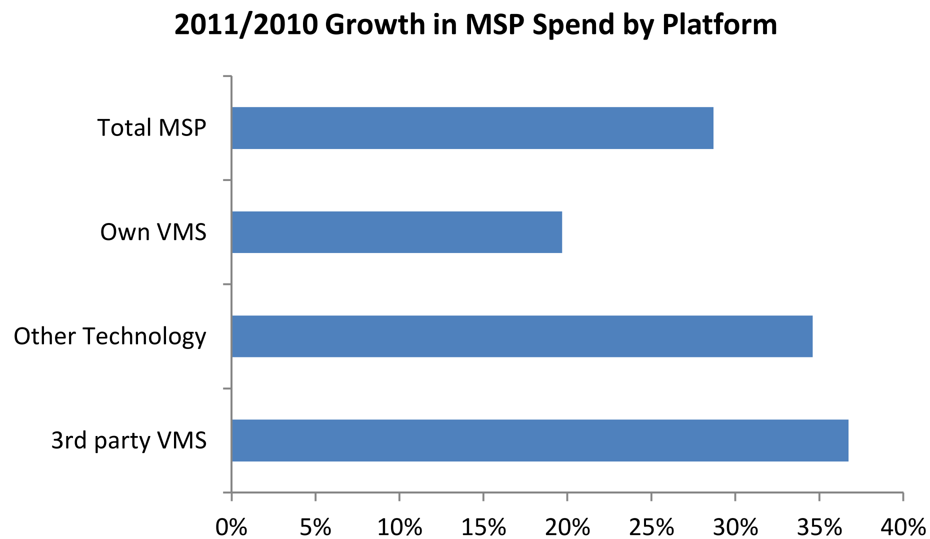
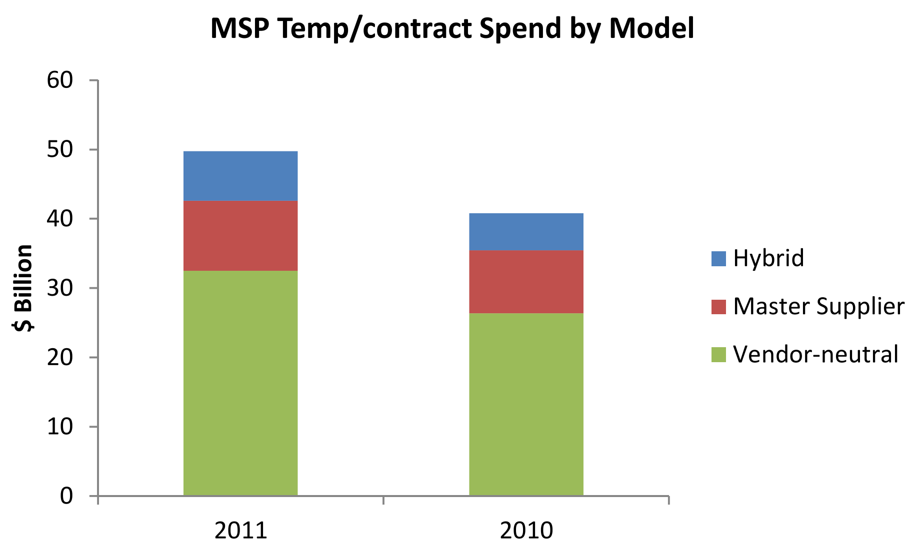
Increasing share of MSP spend through 3rd party VMS

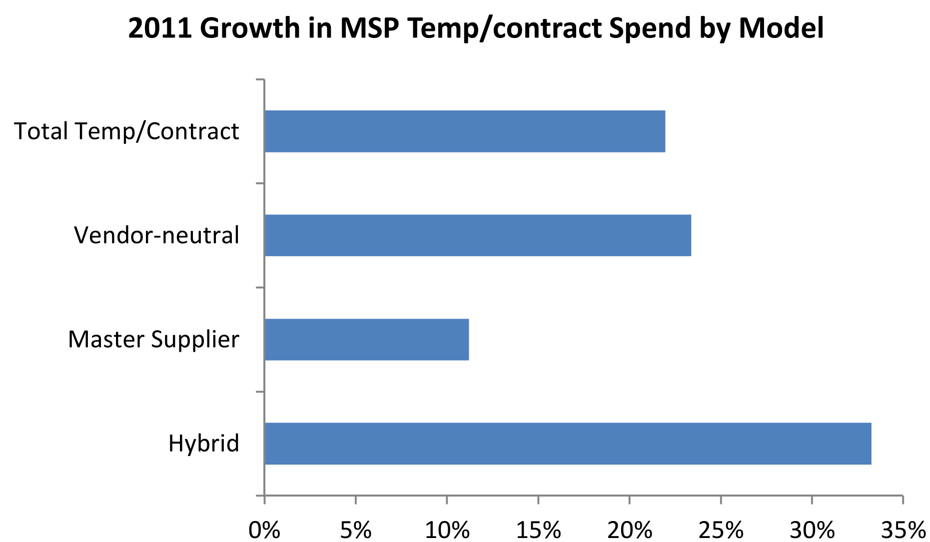




Source: SIA 2012 VMS/MSP Competitive Landscape Report

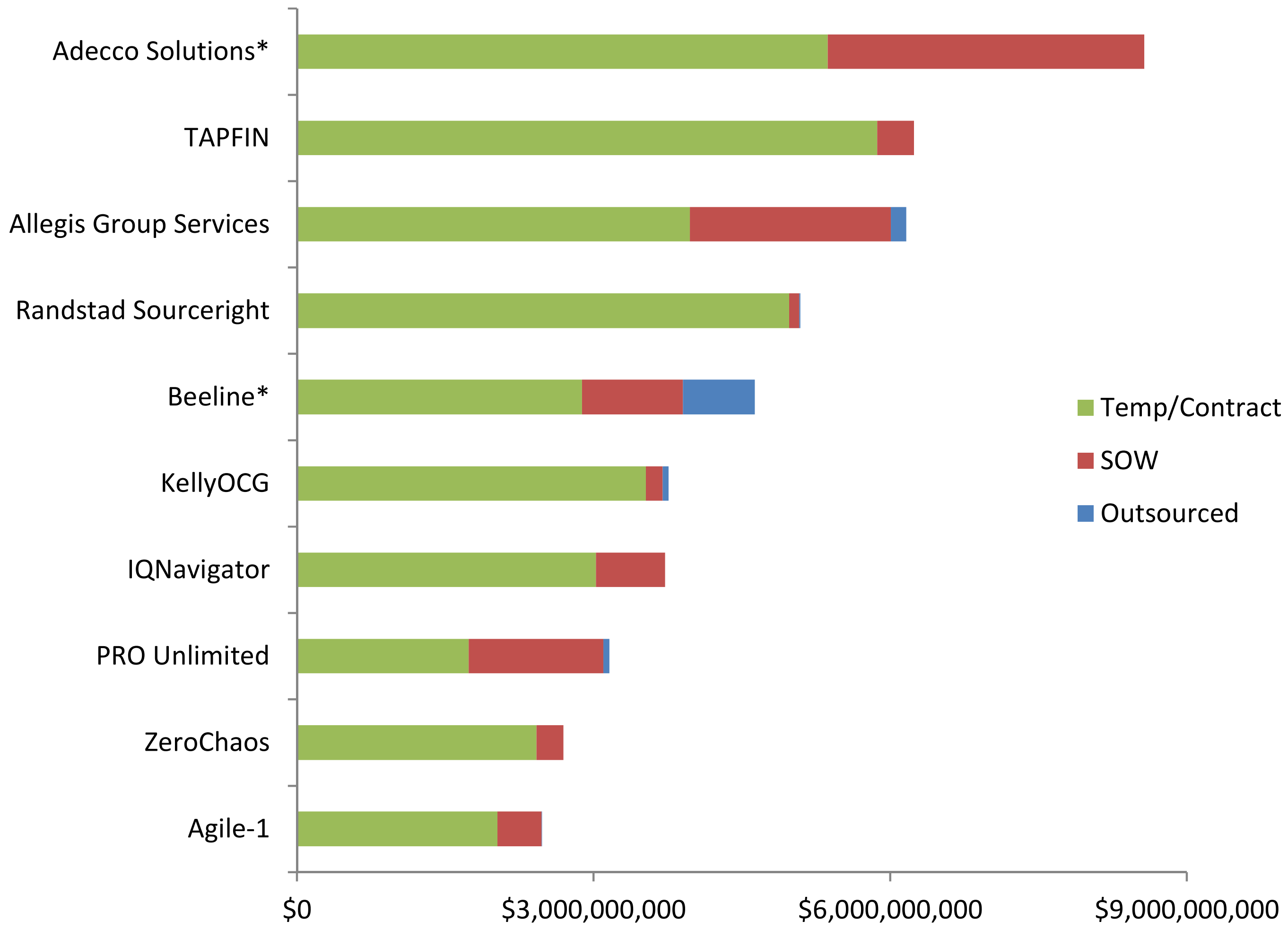
MSP: vendor-neutral, master supplier, and hybrid





Source: SIA 2012 VMS/MSP Competitive Landscape Report

Largest 10 MSP's by 2011 global spend



*After release of report, Adecco Solutions and Beeline merged their MSP businesses under one brand, Pontoon

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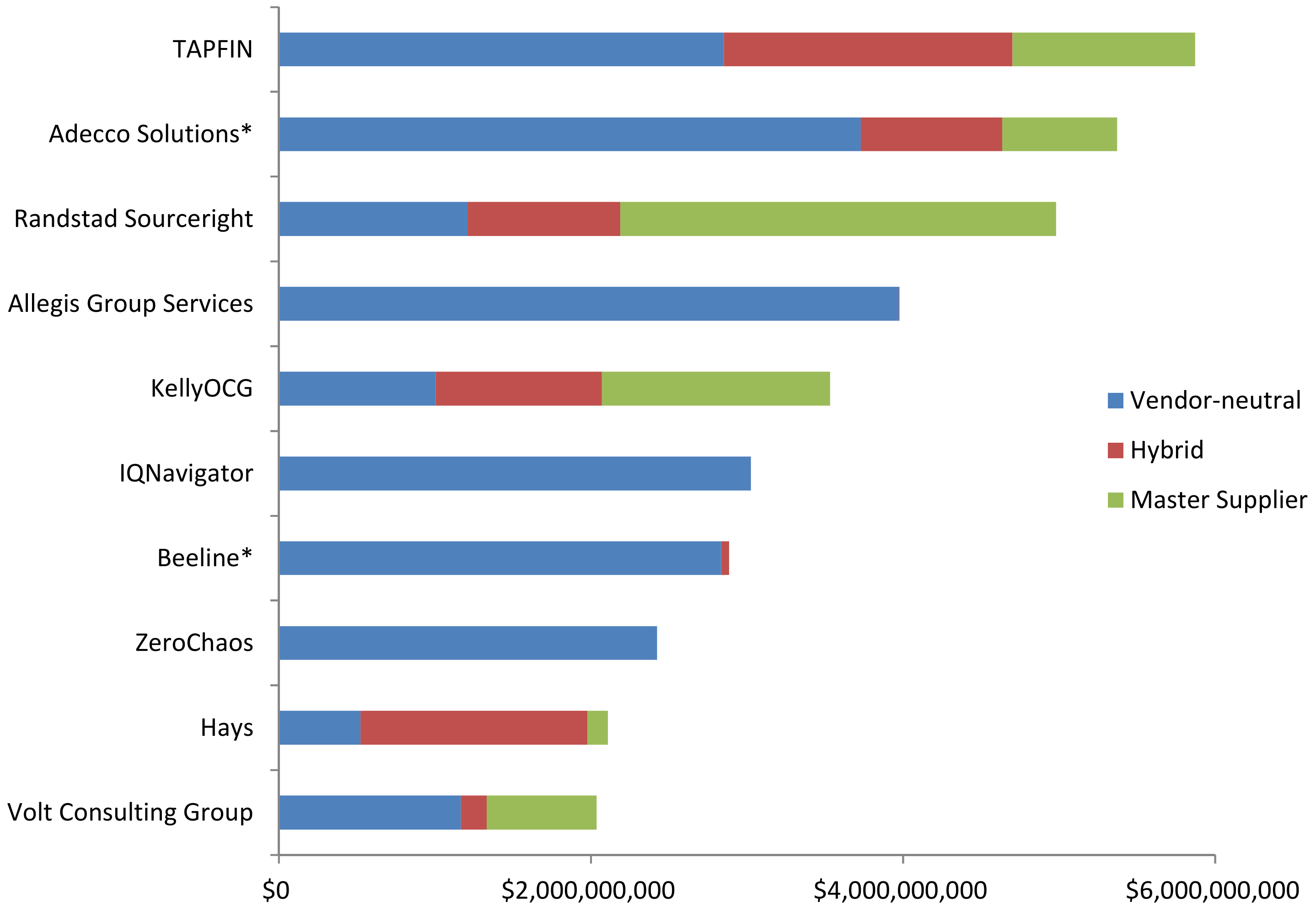
Source: SIA 2012 VMS/MSP Competitive Landscape Report

Largest 10 MSP's by 2011 temp/contract global spend



*After release of report, Adecco Solutions and Beeline merged their MSP businesses under one brand, Pontoon

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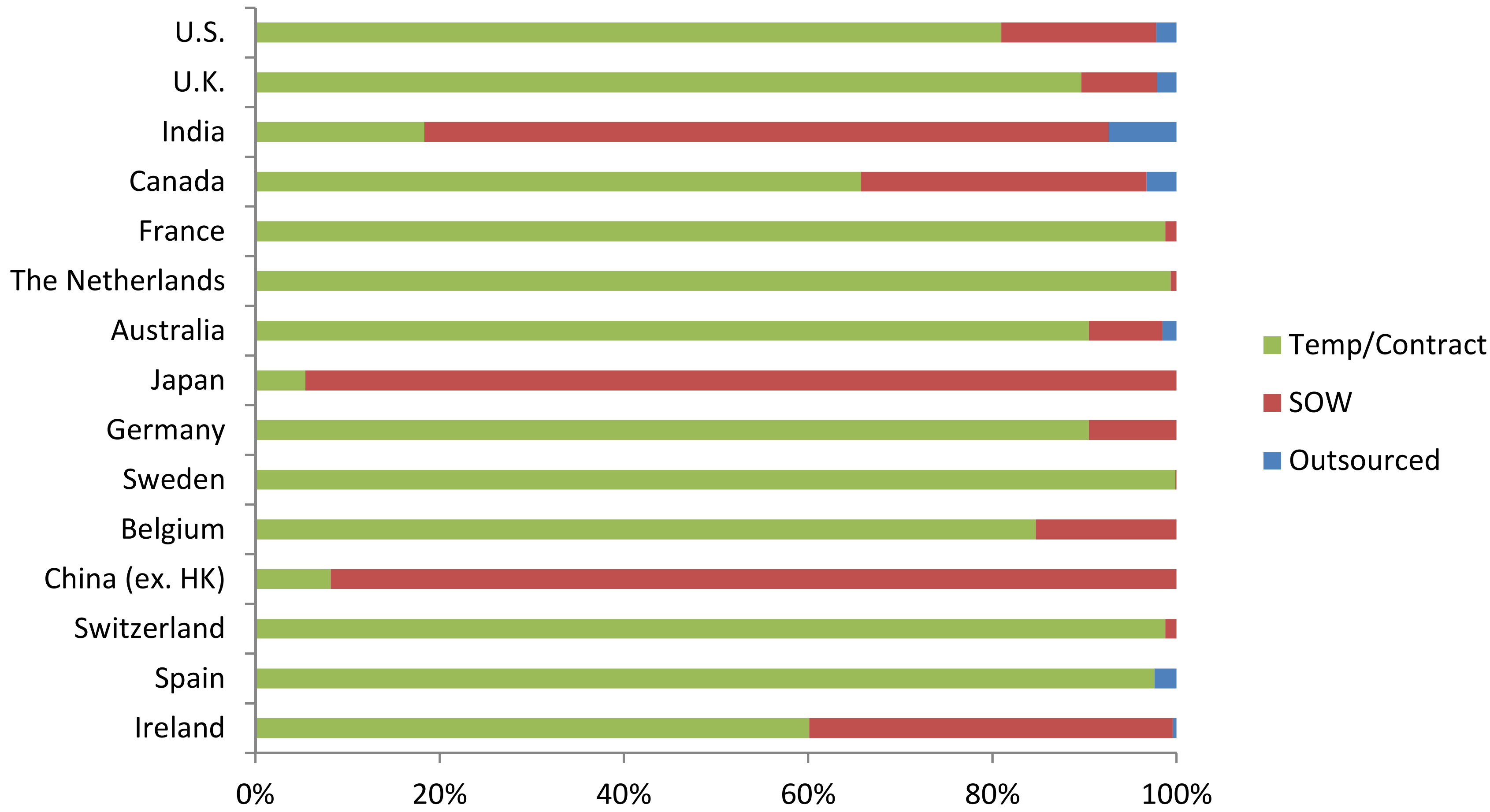
Source: SIA 2012 VMS/MSP Competitive Landscape Report

Mix of MSP spend by country – largest 15 markets



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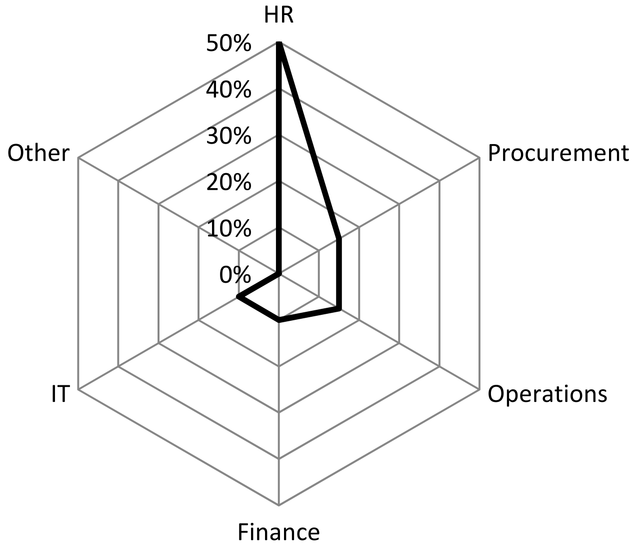
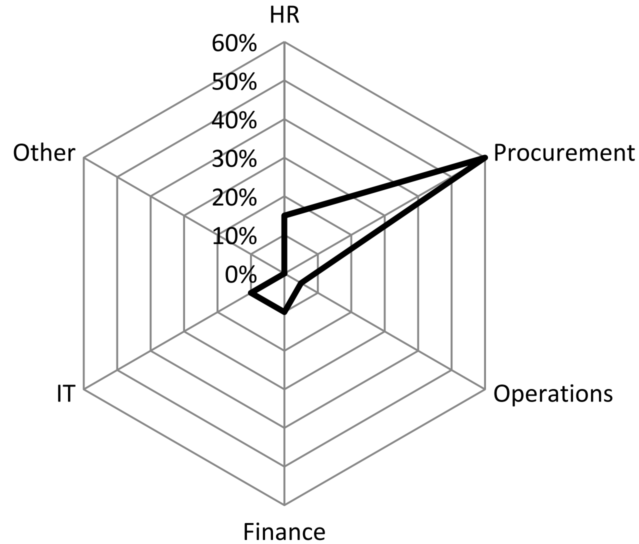
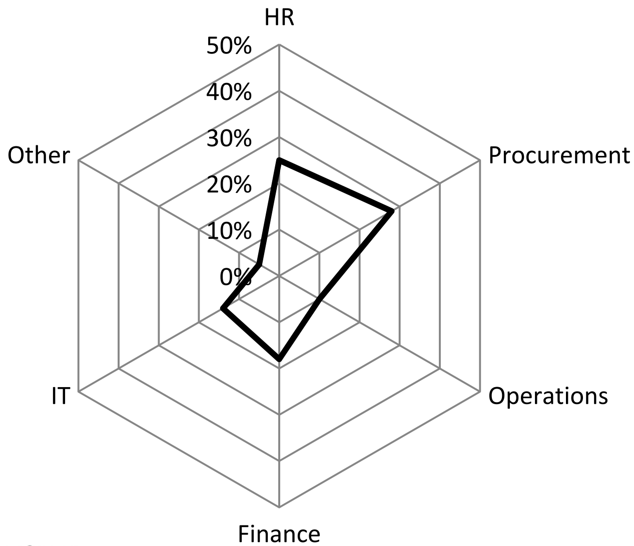
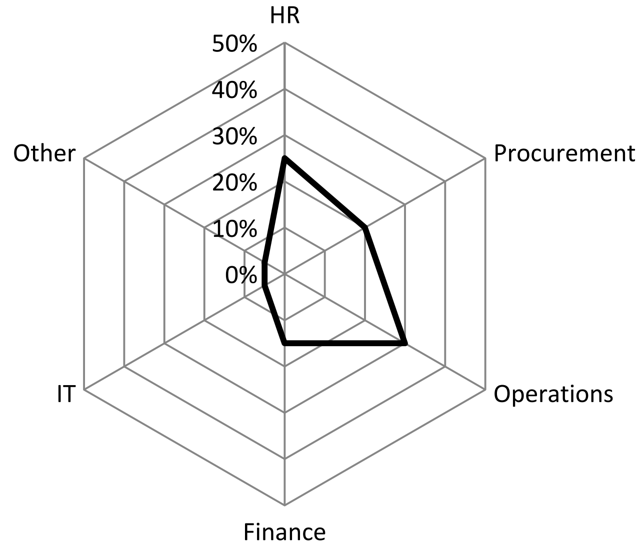
Source: SIA 2012 VMS/MSP Competitive Landscape Report

Variety of focus among companies



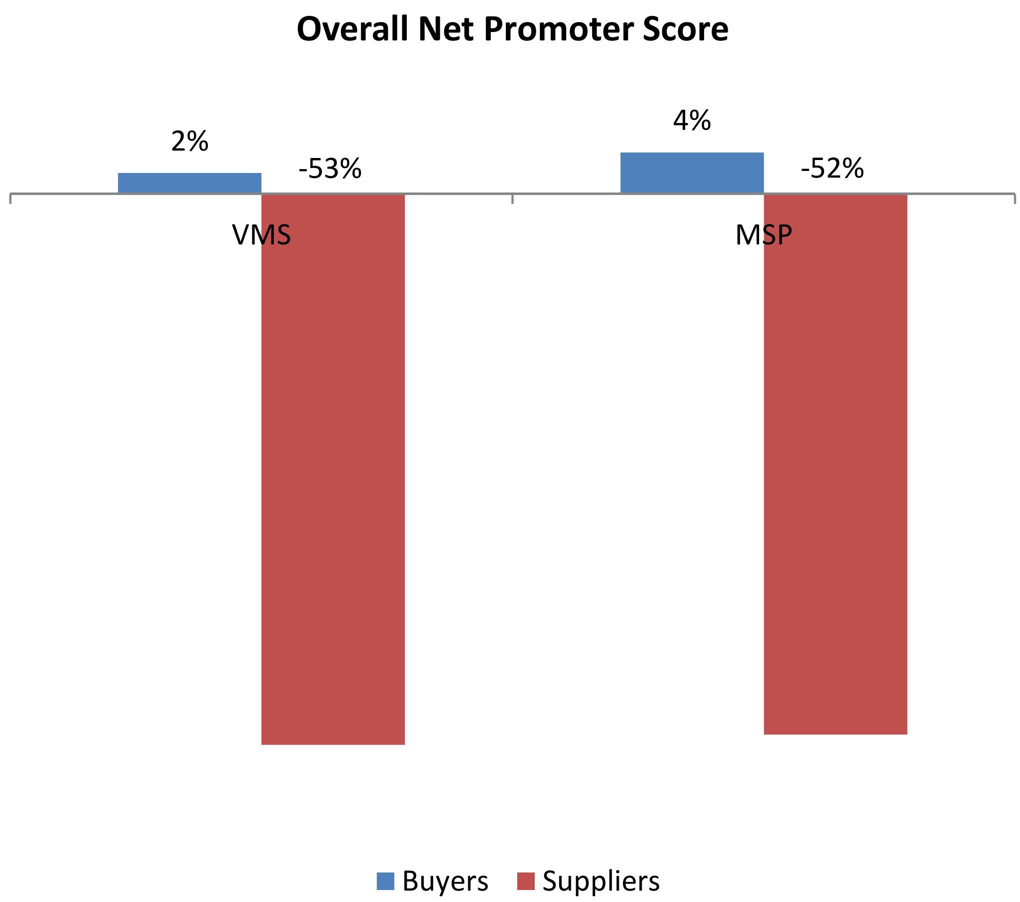






Source: SIA 2012 VMS/MSP Competitive Landscape Report

Buyers are modest promoters, suppliers staunch detractors



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Source: 2012 VMS/MSP Customer Experience Report

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2012 VMS and MSP Service Differentiators

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2012 LANDSCAPE SERVICES AND FEATURES DIFFERENTIATORS

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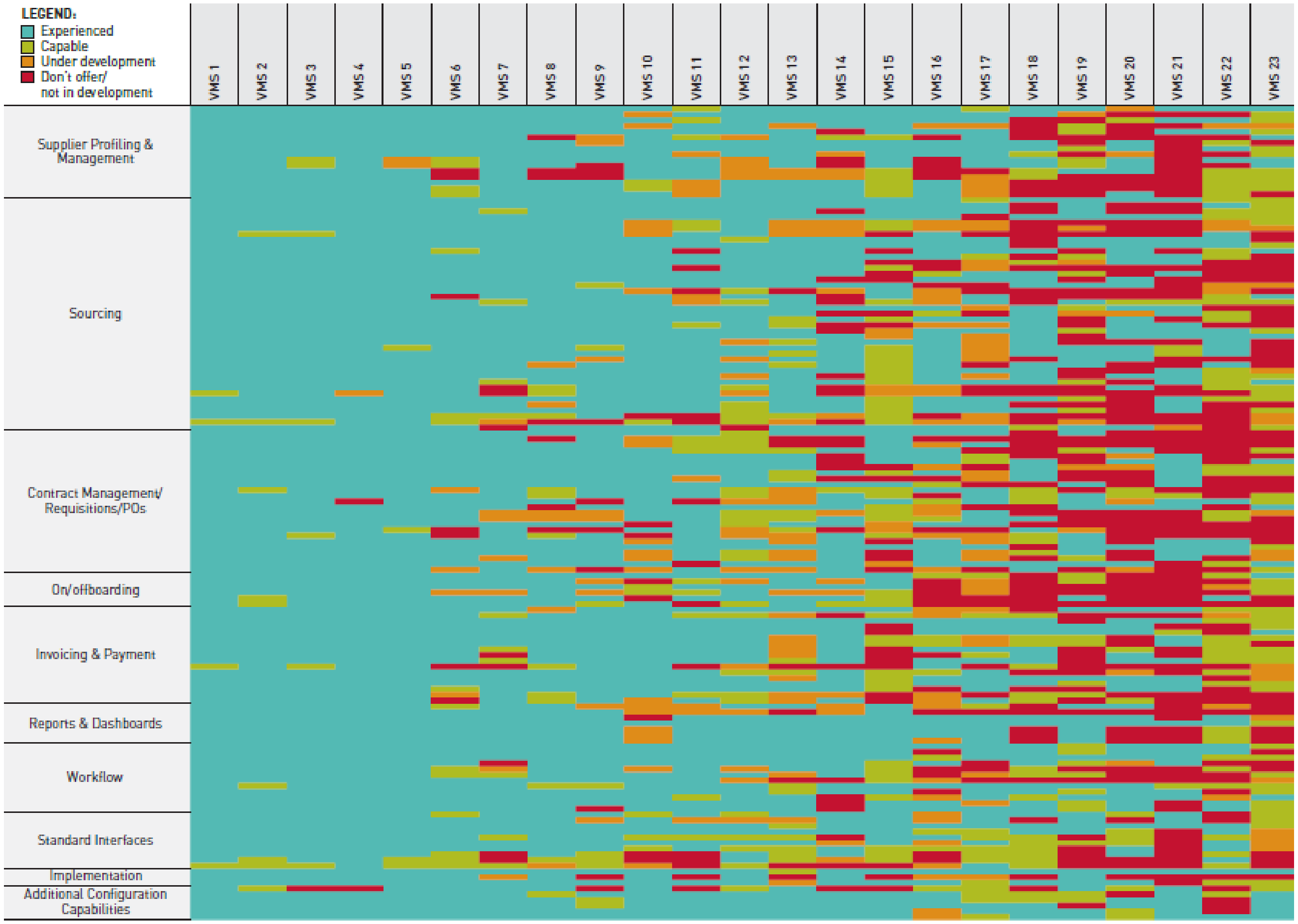
Heat Map of Overall VMS Capabilities



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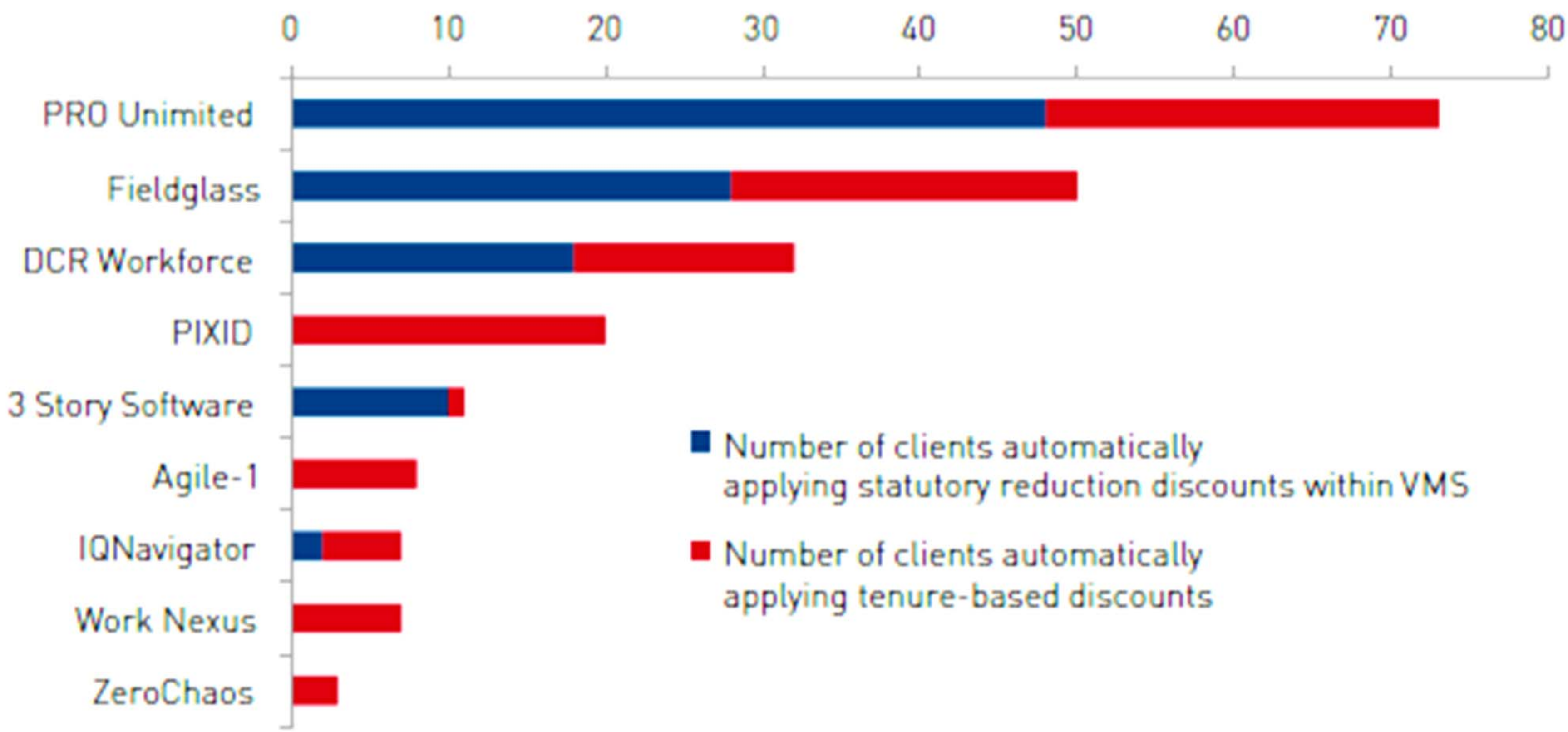
System Derived Rate Discounting



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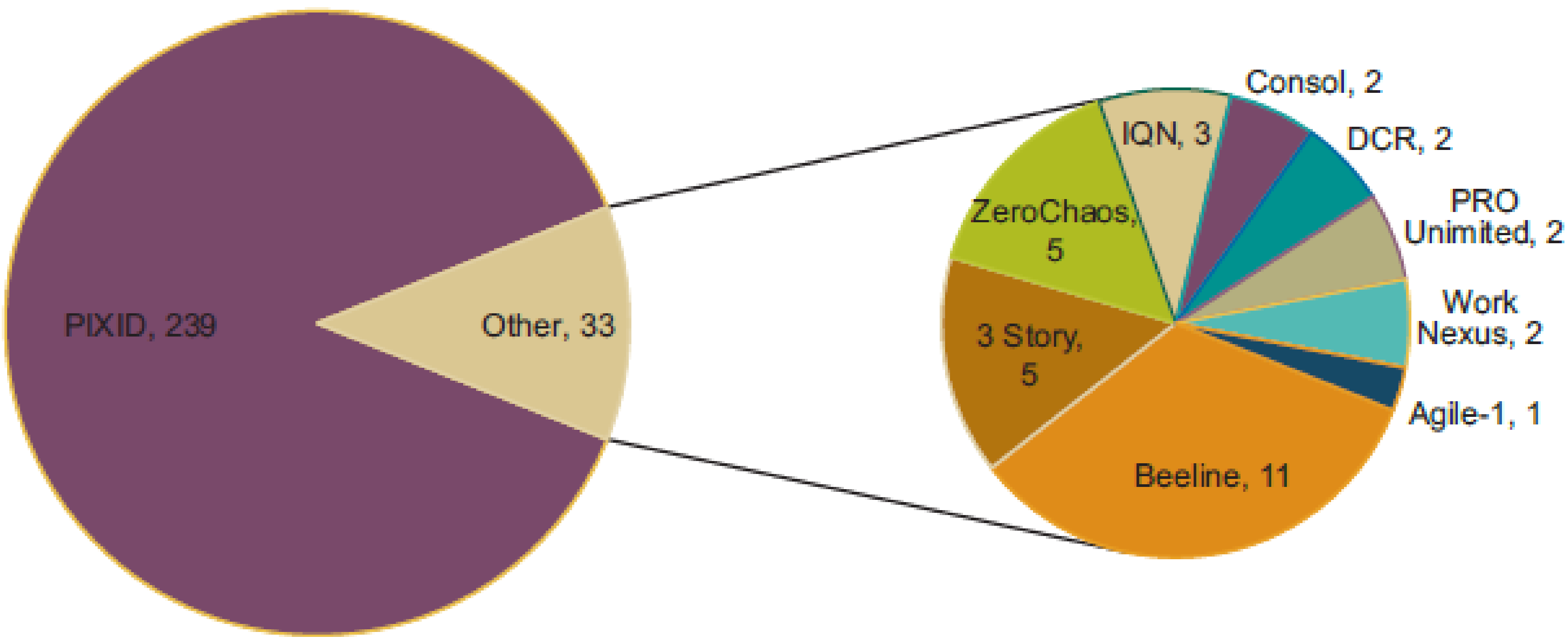
Flat-fee Priced Programs



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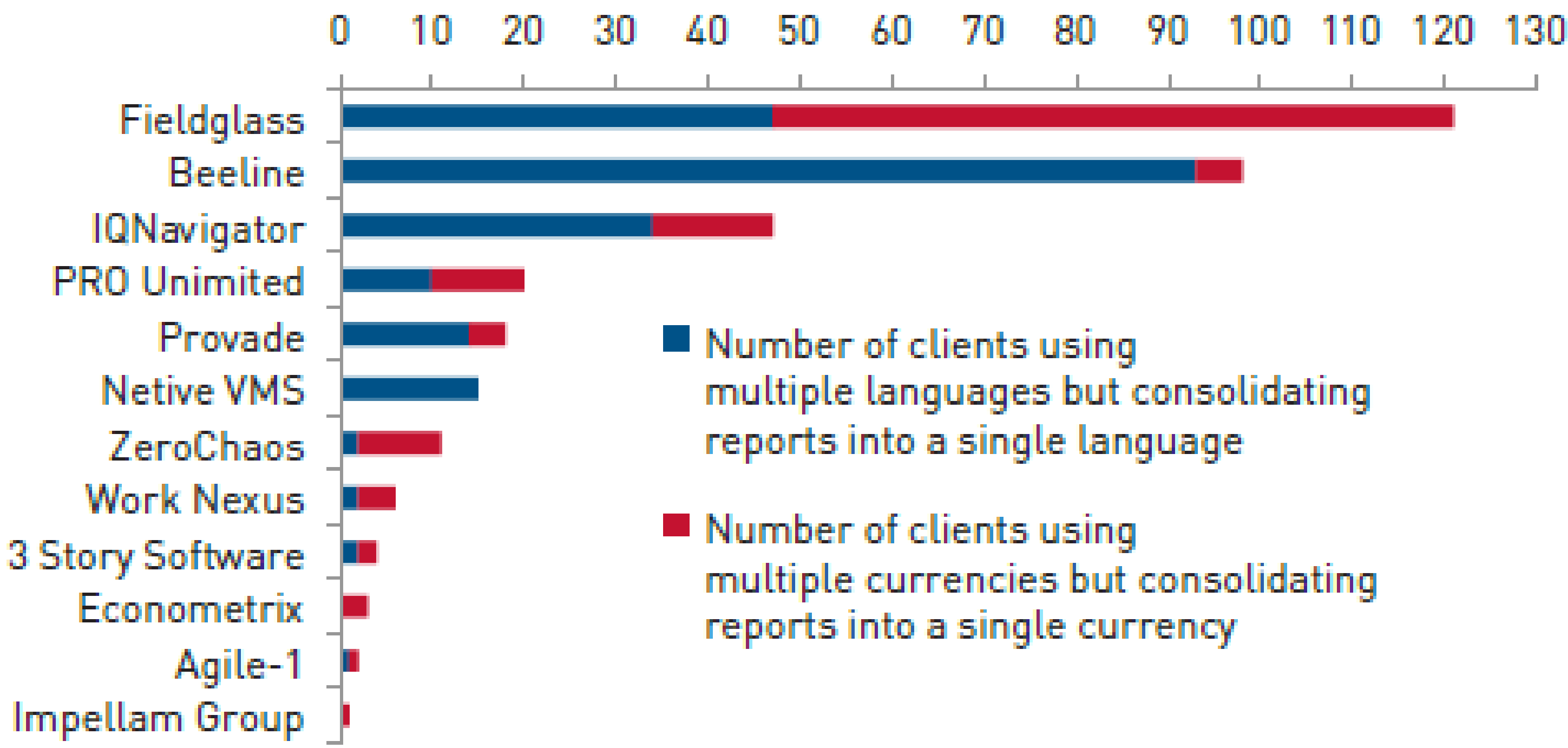
Global Support: Language & Currencies



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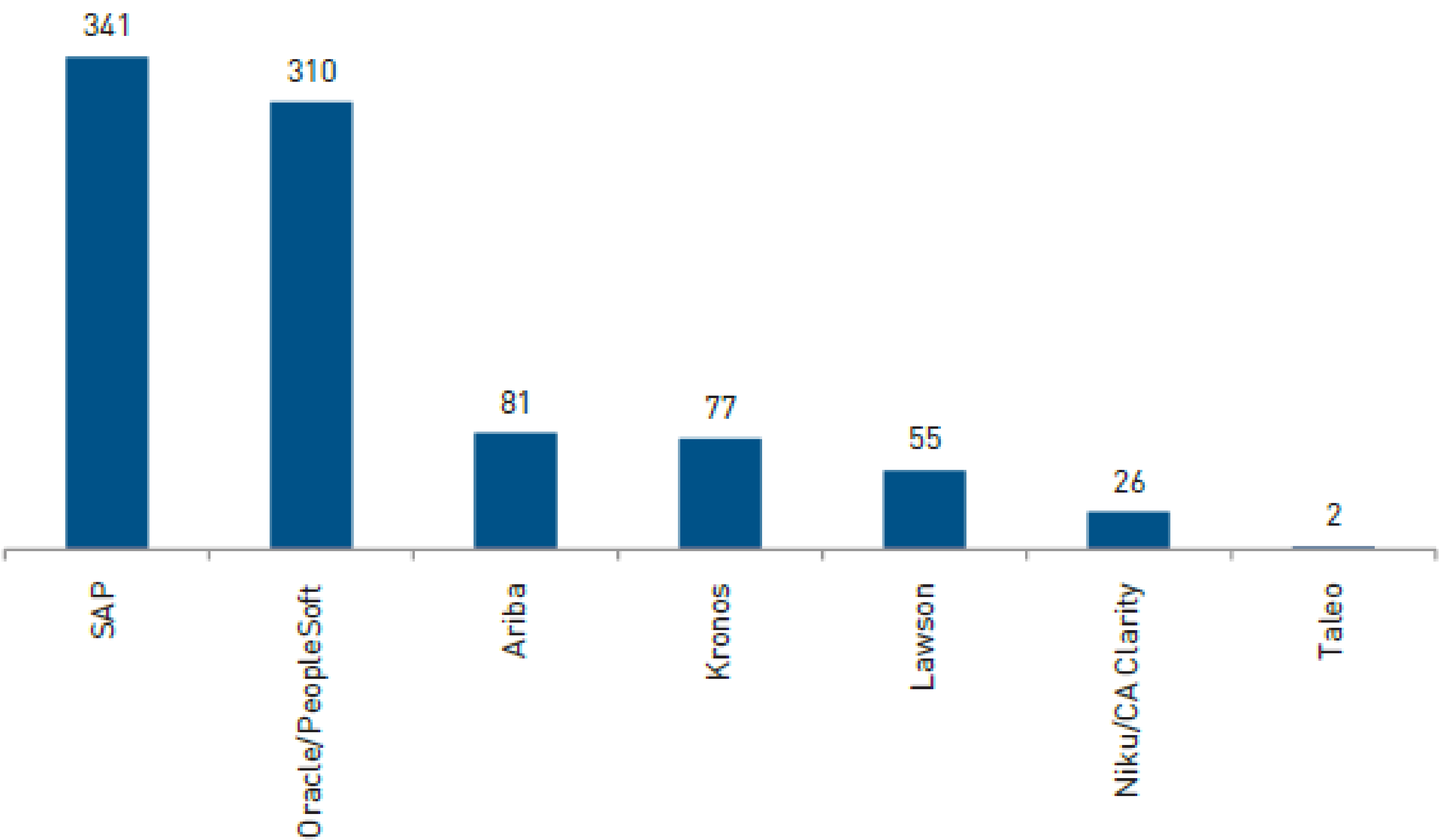
Popular Interfaces



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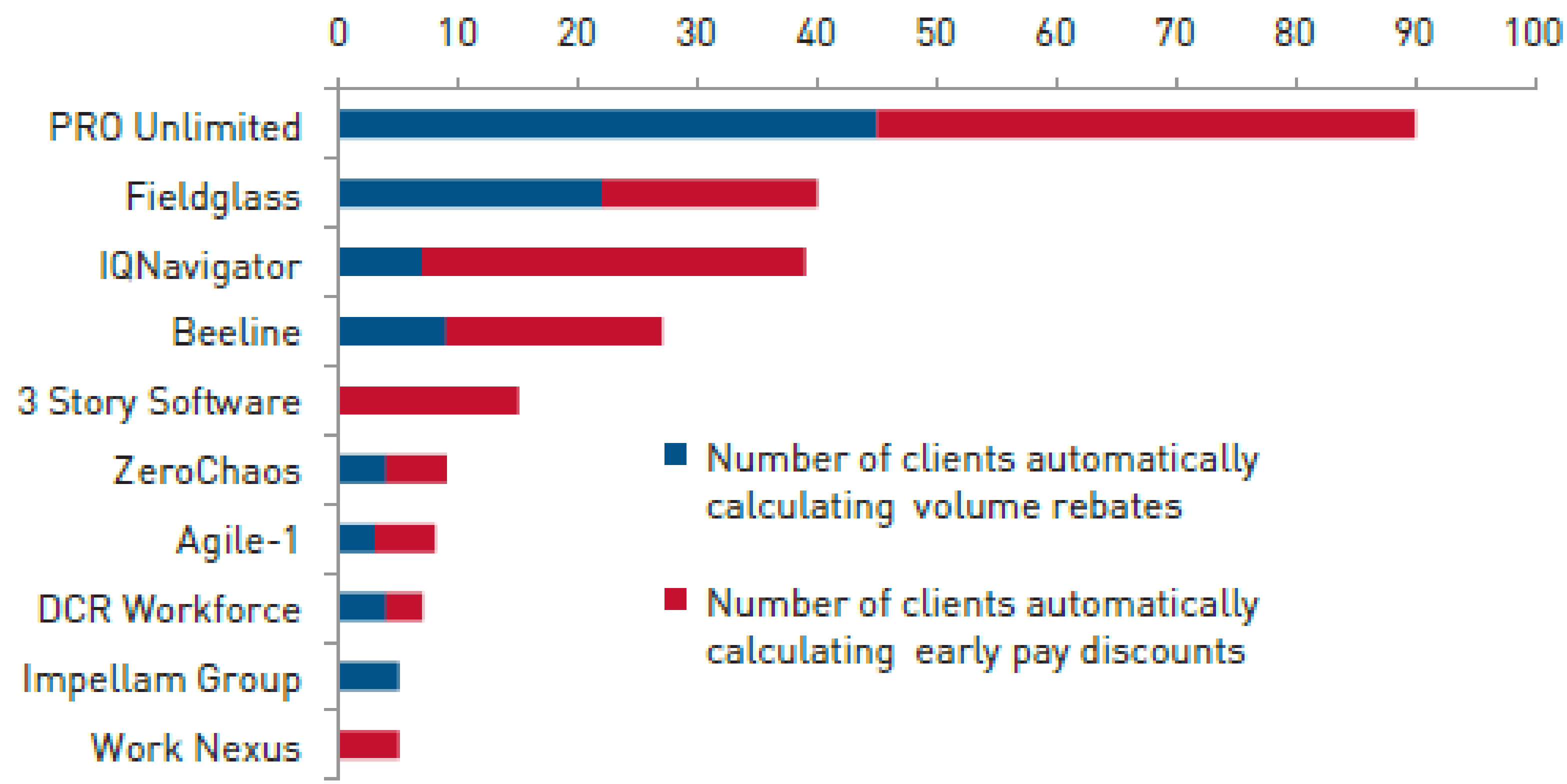
System Derived Invoicing Discounts & Rebates



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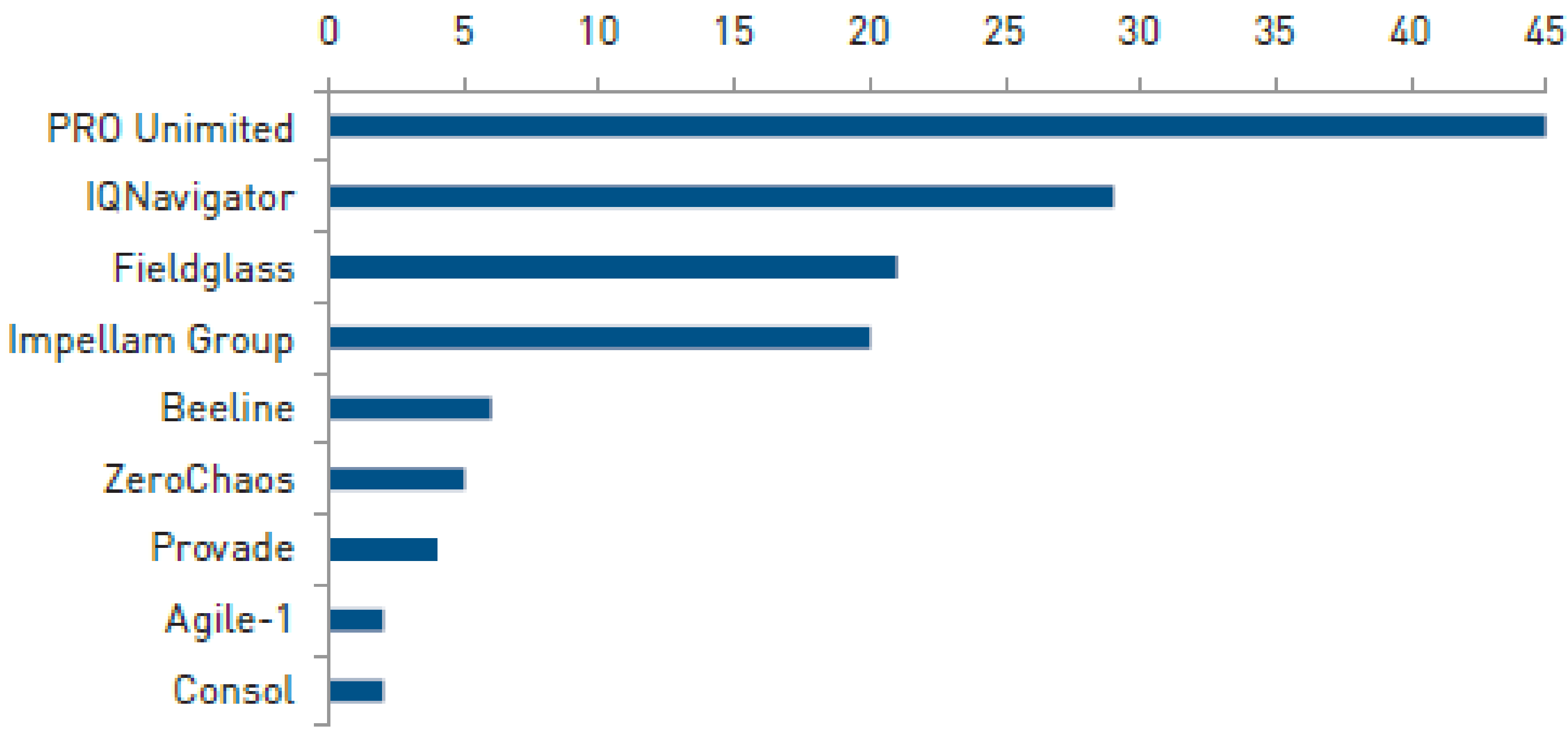
Clients Tracking Non-billable Time for SOW Resources



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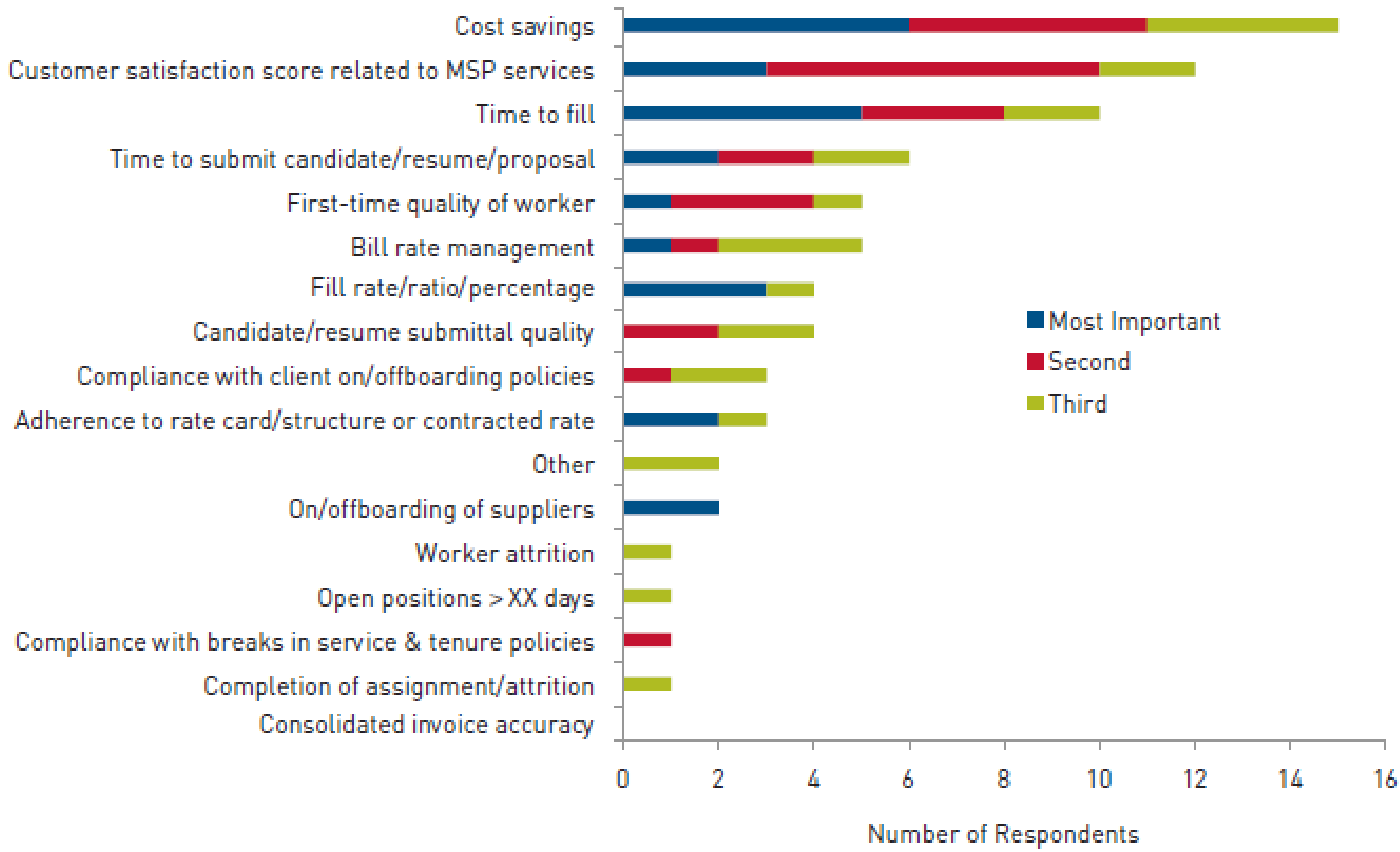
MSP's Prioritization of Metrics



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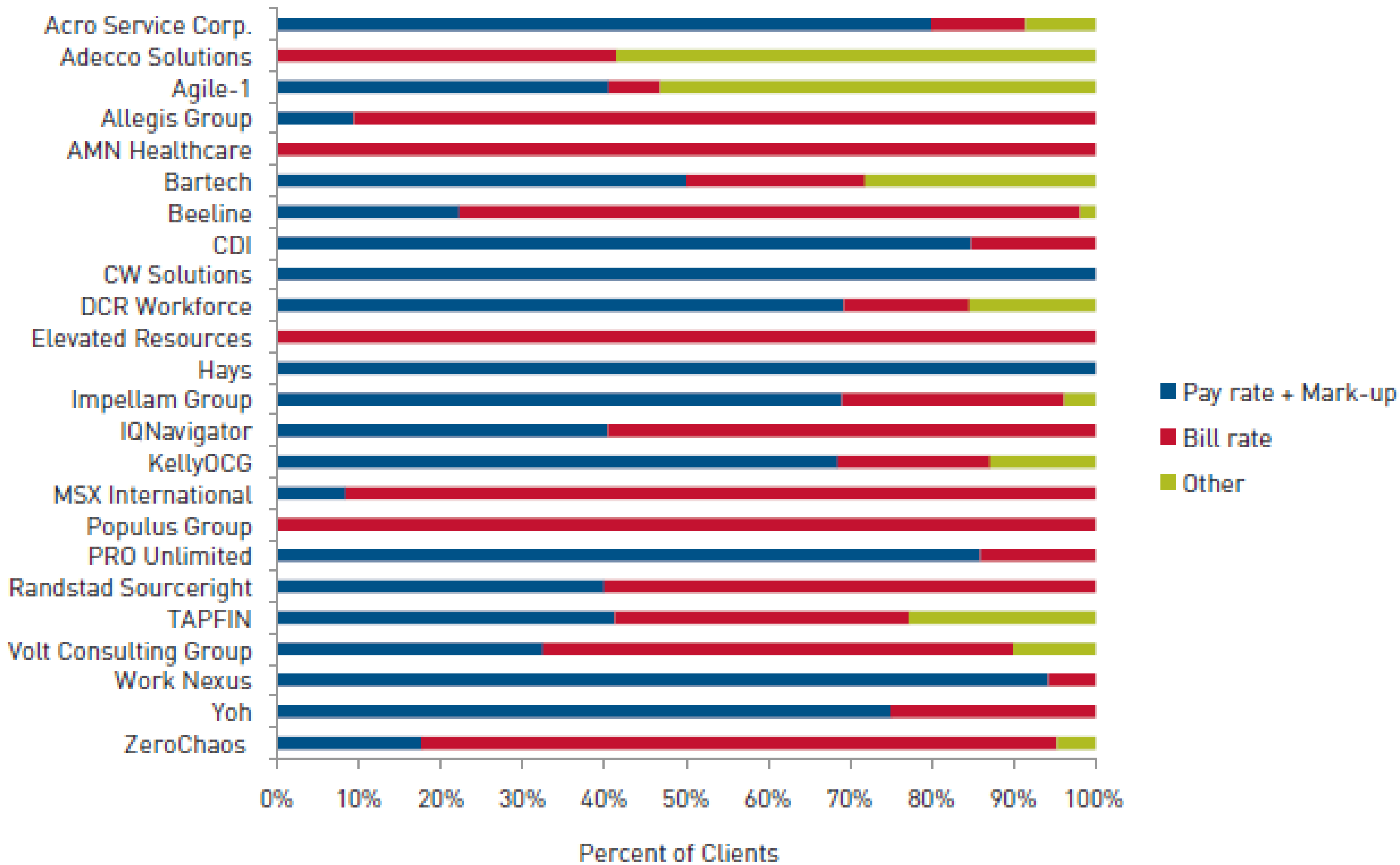
MSP's Mix of Rate Models



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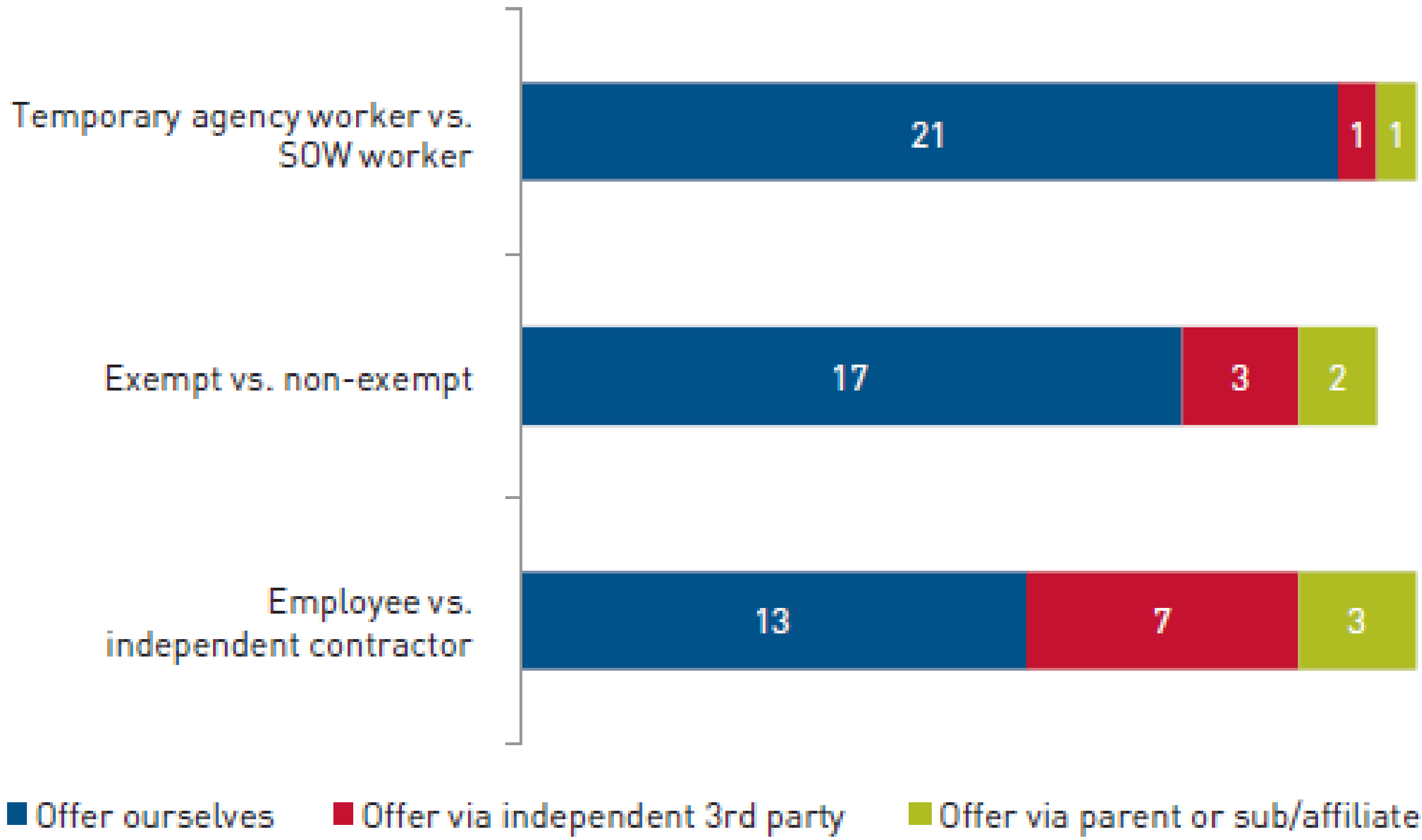
Worker Classification Support



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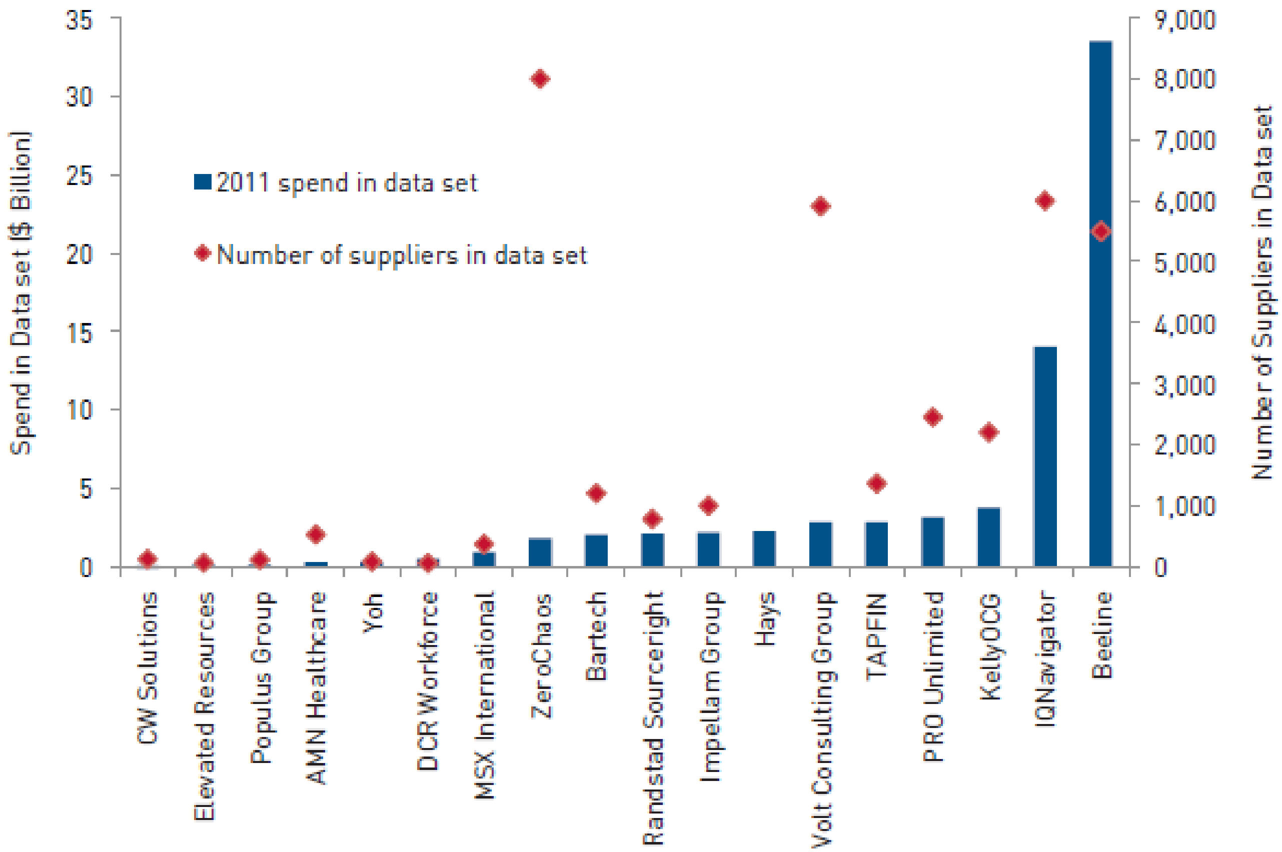
Spend & Suppliers in MSP Datasets



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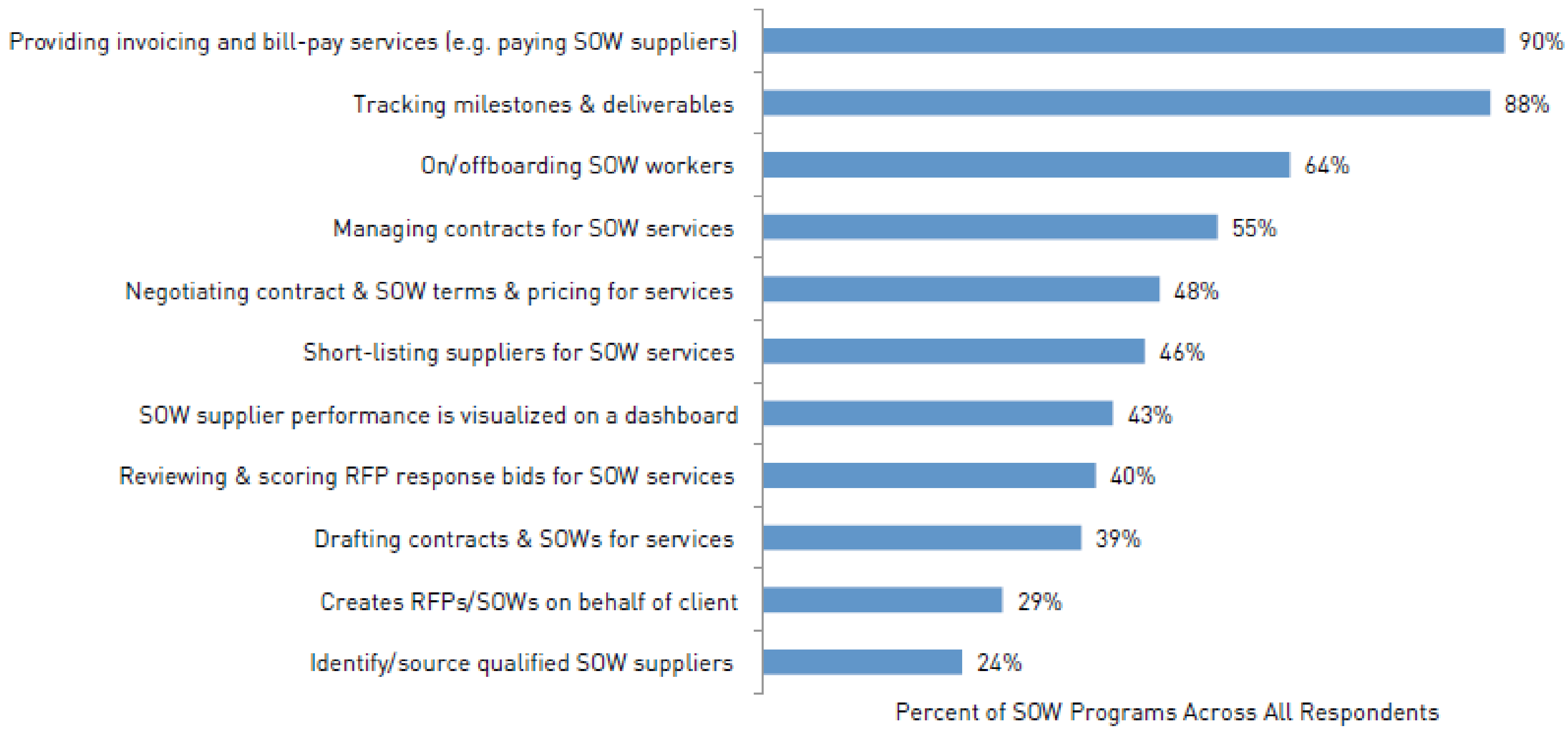
MSP-reported Savings by Type

Savings by Skill Category	Minimum	Median	Maximum	Number reporting
Administrative/clerical	1%	5%	16%	21
Management/professional	3%	8%	15%	23
Information Technology	2%	8%	15%	22
Heavy & Light Industrial	1%	4%	11%	19
SOW	7%	11%	20%	18

SOW-related MSP Program Features



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Time for Your Questions

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November 28, 2012
2013 European Contingent Market Forecasts

December 13, 2012
US Legal Update

January 17, 2013
Incorporating Statement of Work (SOW) Consultants Into Your Program

February 21, 2013
Term Limits and Other Contingent Workforce Risks

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