



**WORLD
EMPLOYMENT
CONFEDERATION**

The Voice of Labour Market Enablers

Economic Report

Enabling work, adaptation,
security & prosperity

2017 edition

ABOUT THE WORLD EMPLOYMENT CONFEDERATION

The World Employment Confederation is the voice of the employment industry at the global level, uniting labour market enablers from 50 countries and 8 of the largest international workforce solutions companies.

The World Employment Confederation brings unique access to and engagement with international policymakers (ILO, OECD, World Bank, IMF, IOM, EU) and key stakeholders (IOE, trade unions, academic world, think tanks, NGOs).

The World Employment Confederation strives for recognition of the economic and social role played by the employment industry in enabling work, adaptation, security and prosperity in our societies. Its members provide access to the labour market and meaningful work to 50 million people around the world and serve around 5 million organisations on a yearly basis.

The World Employment Confederation is organised under 6 regions: Europe, North America, Latin America, APAC Southern, North East Asia and Africa.

This report is a shorter extract of the full WEC Economic Report. For more extensive information check the report online.

www.wecglobal.org/economicreport2017

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Denis Pennel
World Employment Confederation
Managing Director

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Enabling Work 17

- Create more work opportunities
- Provide a stepping stone
- Deliver quality & meaningful work
- Improve access to & transparency of labour market

Enabling Adaptation 27

- Deliver diversified workforce solutions
- Improve employability by upskilling
- Facilitate work transitions & mobility
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Enabling Security 37

- Act as career agent
- Deliver portable rights
- Secure access to talents
- Increase business competitiveness

Enabling Prosperity 45

- Reduce undeclared work & unemployment
- Increase inclusiveness and diversity
- Increase work incomes & purchasing power
- Enrich GDP by sales revenues

Foreword

Dear reader,

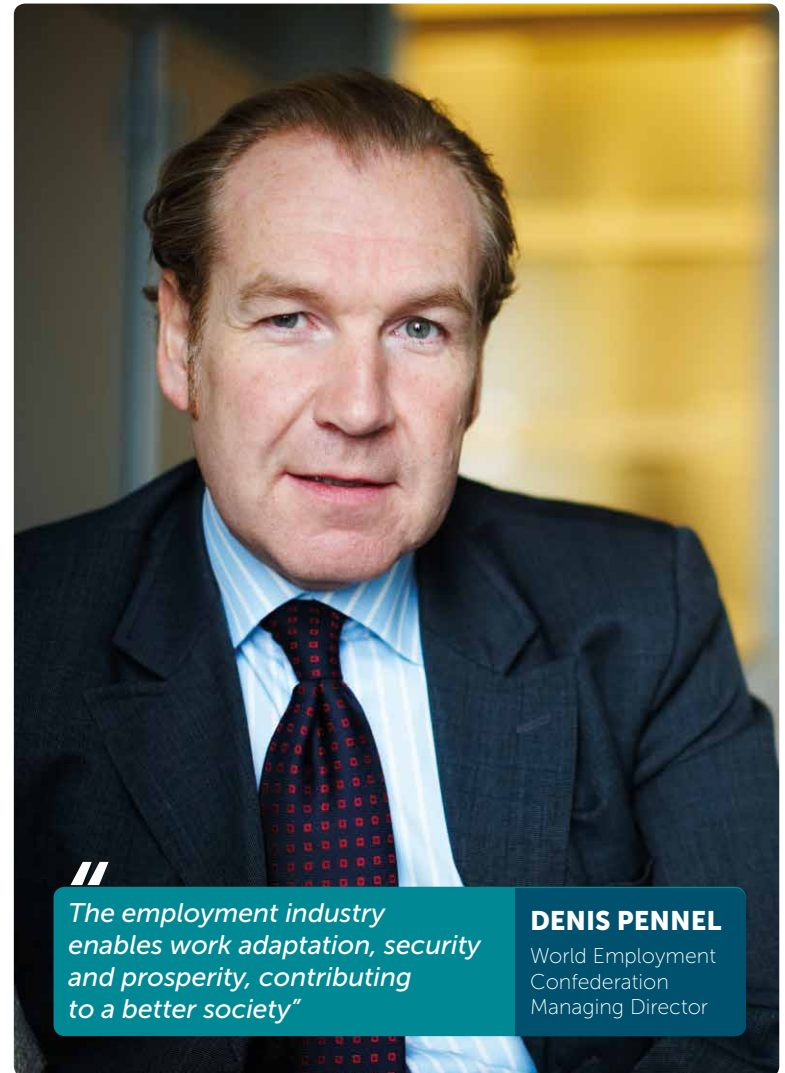
As labour market enablers, the members of the World Employment Confederation contribute to a better functioning job market. Thanks to the combined 169,000 employment agencies and 1.5 million HR specialists it regroups around the world, the industry enables work, adaptation, security and prosperity.

The 2017 edition of the World Employment Confederation's Economic Report documents these four enabling functions, by compiling robust facts and figures about the employment industry. The number of workers who were able to access the labour market after intermediation by a recruitment and employment agency reached 50 million people in 2015, including a majority of youngsters! The turnover of the industry across the globe totaled €417 billion, providing sustainable workforce solutions to 5 million organisations. There is much more information to be found in the report. I invite you to browse through it and find out for yourself.

In addition to the hardcopy of this report, a complementary online version is available with additional data. For a full overview of the report, please visit www.wecglobal.org/economicreport2017. This will make it easier for you to browse through the report and share or repost its content more easily.

If you have any questions after reading the report, please feel free to get in touch with the World Employment Confederation's Head Office at info@wecglobal.org.

Denis Pennel
Managing Director



“
The employment industry enables work adaptation, security and prosperity, contributing to a better society”

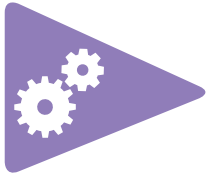
DENIS PENNEL

World Employment
Confederation
Managing Director

KEY FINDINGS

The employment industry has been leading in a changing world of work for decades. It does so by acting as enabler in the labour market, offering a full range of HR services, including agency work, direct recruitment, career management, recruitment process outsourcing (RPO) and managed services provision (MSP).

At a global level, the employment industry:



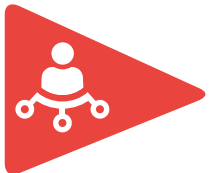
Enables work

Each year, around 50 million people access the labour market thanks to an employment agency (43 million of whom via agency work). On average, 17% of them are students working while studying (31% of agency workers are younger than 25 years old) and 44% are women. 81% of agency workers are satisfied with their work (with 34% being very satisfied). In terms of penetration rate, agency work accounts for 1.7% of the global working population. With a global turnover amounting to €417 billion and 1.5 million HR consultants, the industry generates an important economic added value to society.



Enables security

On average, before entering into agency work 33% of workers were unemployed, while afterwards only 21% went back to unemployment. Similarly, 43% of people starting agency work were employed before, while 71% remain in employment afterwards. From the business side, 50% of UK companies recognise that agency work is important to secure short term access to key strategic skills. Companies using innovative workforce solutions such as RPO or MSP are able to reduce hiring costs by 38%.



Enables adaptation

In a changing world of work, the employment industry supports over 5 million companies each year to adapt to an increasingly volatile environment. On the workers' side, 62% of agency workers in the USA agree that they developed new skills or improved their skills while temping. In France, 90% of agency workers say temping is useful to acquire professional experience and 78% to get trained.



Enables prosperity

By reducing frictional unemployment, the industry contributes to public budgets, saving governments the cost of unemployment benefits. In addition, the provision of flexible workforce solutions leads to a reduction of undeclared work, increasing social charges and corporate tax being paid. Finally, the industry drives inclusiveness and participation to the labour market: 34% of agency workers are younger than 25 years old and 44% are women.

THE EMPLOYMENT INDUSTRY

Labour market enablers

The employment industry enables work, adaptation, security & prosperity.

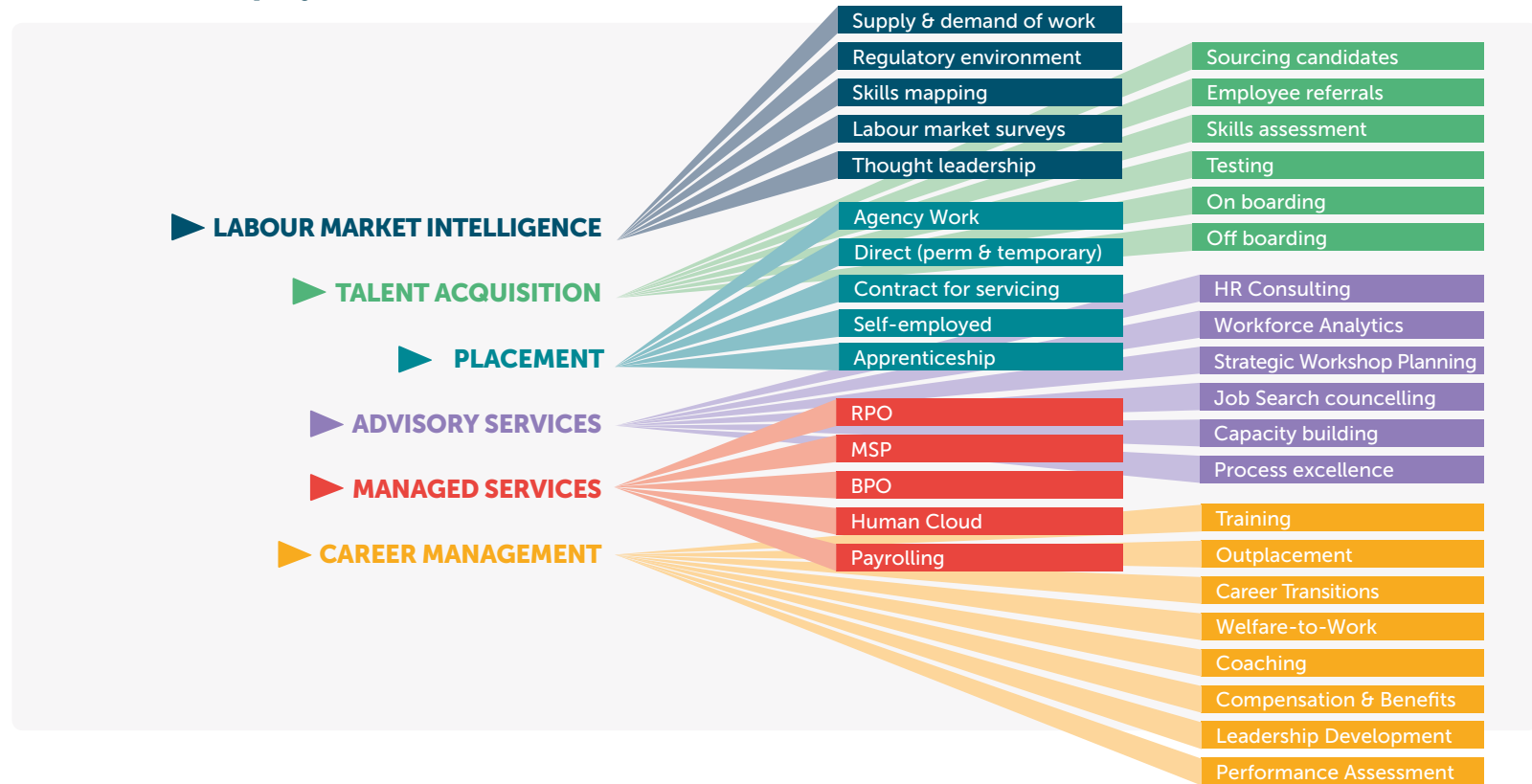
By doing so, the industry:

- ▶ gives hope
- ▶ develops confidence
- ▶ builds trust
- ▶ delivers pride

As a result, employment and recruitment agencies act as social integrators, agility creators, trusted labour market advisors and growth drivers.



The range of services delivered by the members of the World Employment Confederation



Key indicators

THE EMPLOYMENT INDUSTRY IN 2015

In 2015, the employment industry succeeded to support 50 million people entering and progressing in the labour market at the global level. Thanks to the wide range of HR services it offers (including agency work, direct recruitment, career management, recruitment process outsourcing and managed services provision), the industry contributes to a better functioning labour market and achieved a €417 billion global turnover.

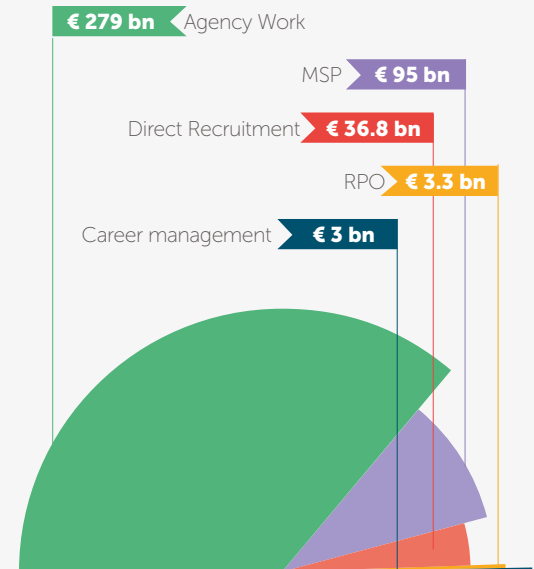
Acting as social integrators, agility creators, trusted labour market advisors and growth drivers, the 169,000 employment agencies the World Employment Confederation gathers – supported by the 1.5 million staff working as HR consultants, branch managers and administrative assistants – simplify the increasing complexity of the world of work.

By enabling work, adaptation, security and prosperity, the employment industry gives hope, develops confidence, builds trust and delivers pride to both individuals and companies.

Global market size of
€ 417 billion
(sales revenues)

Global market size (sales revenues)

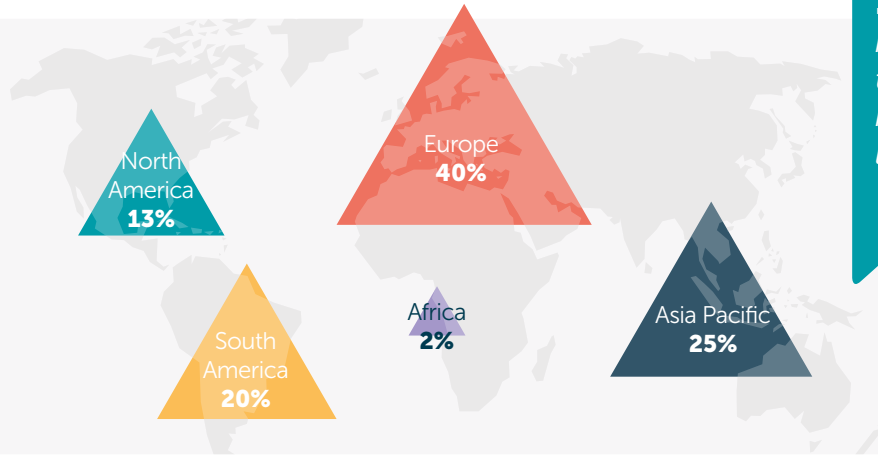
Within the employment industry, the Agency Work market (without MSP activities) accounts for 67% of the overall global sales revenues of the employment industry, followed by the MSP market (22%) and the Direct Recruitment market (9%).



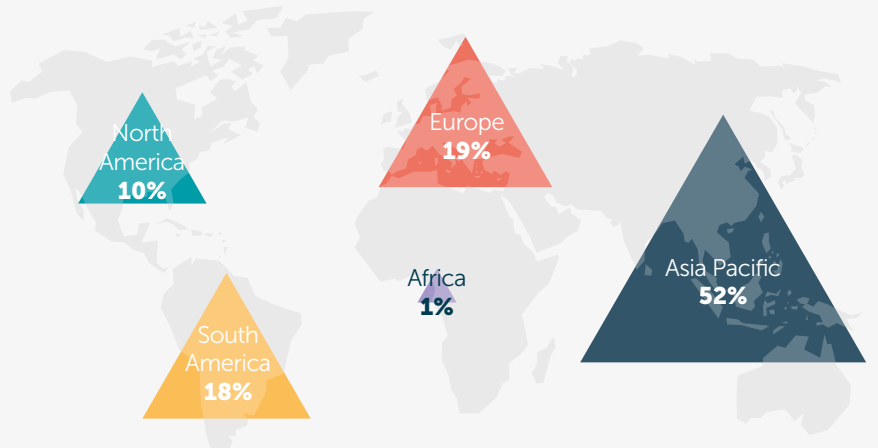
NB: Exchange rate to the € is based on 2015 annual average

169,000
employment
& recruitment
agencies and
1.5 million
internal staff
to help people
navigate the
labour market

Number of agencies



Number of internal staff



The Employment industry in 2015 helped around **50 million people** access the labour market at global level

Career Management
3,000,000 individuals

Direct Recruitment
2,118,306 individuals

NB: number of individuals only covers activities from the members of the World Employment Confederation

RPO & MSP
2,500,000 individuals

Agency Work Headcounts
43,319,404 individuals

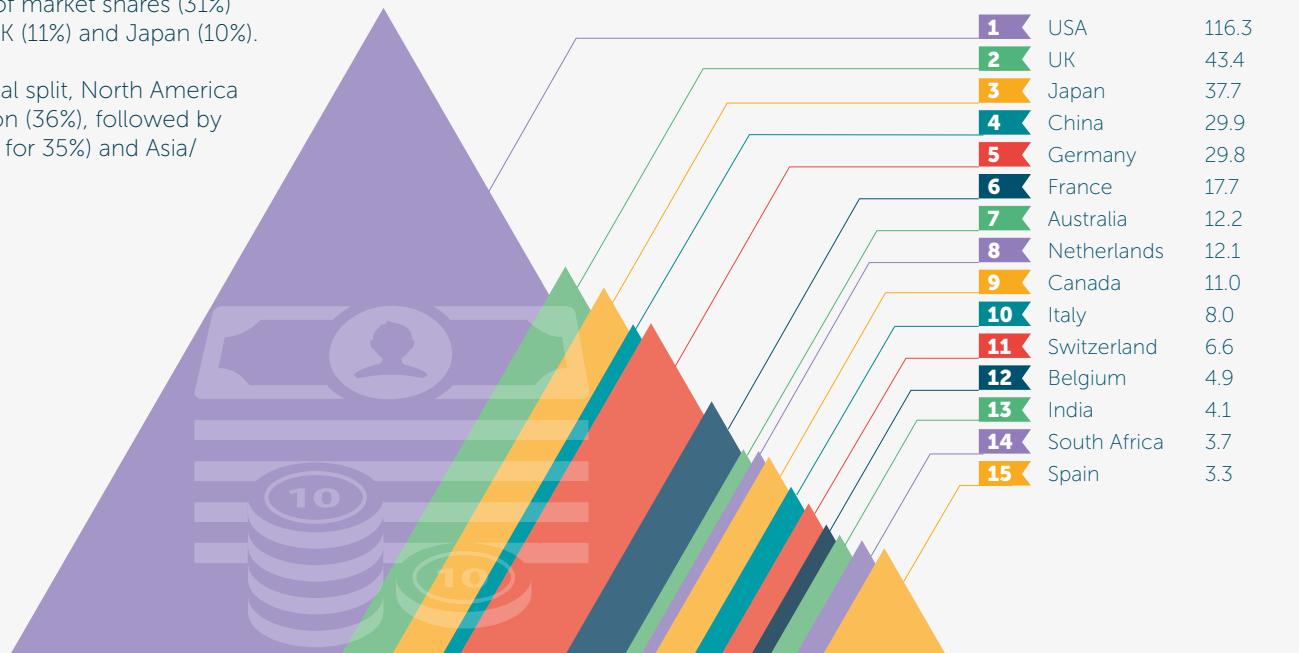
Argentina	50,664
Australia	550,000
Austria	226,000
Belgium	608,591
Brazil	507,564
Bulgaria	10,000
Canada	450,000
Chile	148,118
China	8,680,000
Colombia	513,069
Croatia	16,000
Czech Republic	250,000
Denmark	20,647
Estonia	5,000
Finland	100,000
France	2,000,000
Germany	949,227
Greece	10,316
Hungary	124,576
India	2,100,000
Ireland	120,000
Italy	640,000
Japan	2,630,325
Luxemburg	24,164
Mexico	1,765,101
Morocco	62,000
Netherlands	770,136
New Zealand	105,000
Norway	95,000
Poland	799,727
Portugal	118,000
Romania	67,067
Russia	75,767
South Africa	900,000
Spain	562,345
Sweden	153,000
Switzerland	314,000
United Kingdom	1,198,000
USA	15,600,000

THE AGENCY WORK MARKET

Top 15 countries ranked by sales revenues (2015)

The Agency Work market amounted to €374 billion in 2015 (MSP activities included), with the USA being the leading country in terms of market shares (31%) followed by the UK (11%) and Japan (10%).

In terms of regional split, North America is the largest region (36%), followed by Europe (accounts for 35%) and Asia/Pacific (22%).



USA
2.2%

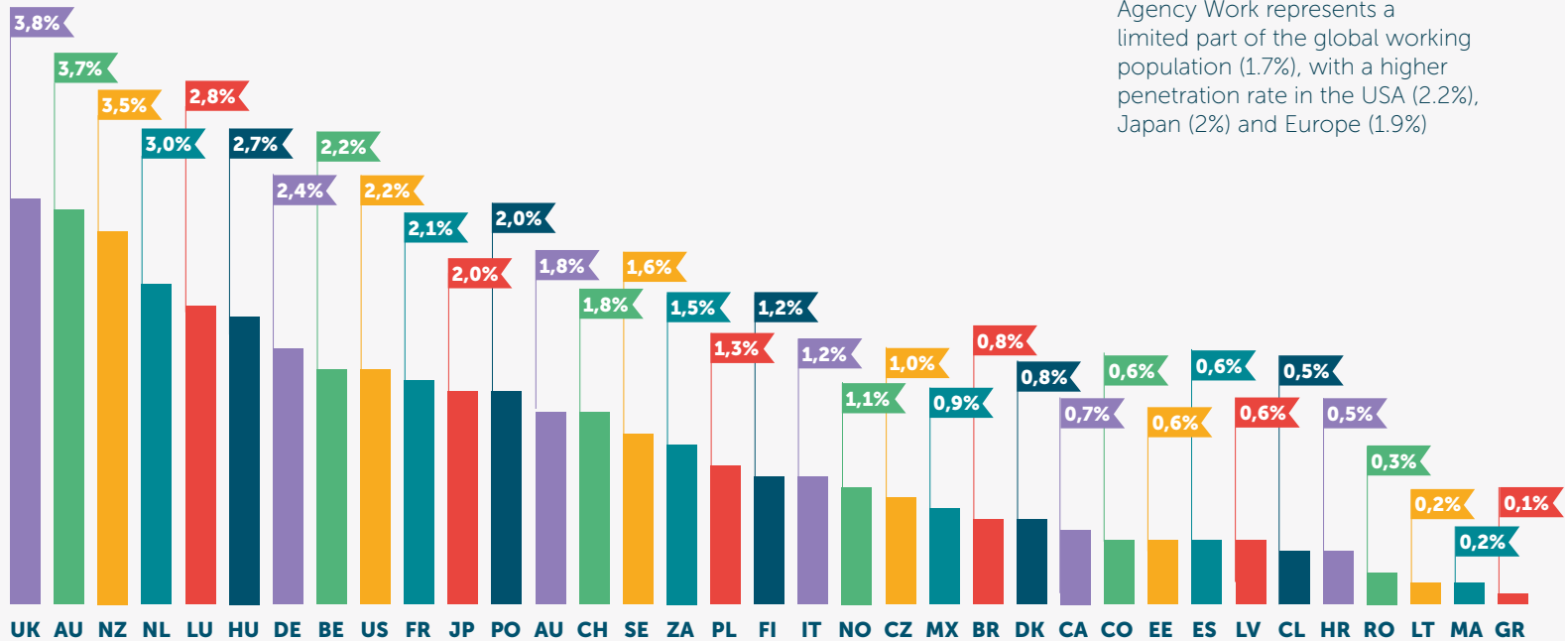
Japan
2.0%

Europe
1.9%

Global
1.7%

THE AGENCY WORK MARKET

Penetration rate by country (2015)



THE DIRECT RECRUITMENT MARKET

Top 15 countries ranked by sales revenues (2015, in million €)

1	USA	18,938
2	UK	4,121
3	Australia	4,059
4	Canada	3,000
5	Japan	2,682
6	Germany	2,004
7	France	1,000
8	Switzerland	621
9	Ireland	600
10	New Zealand	423
11	Belgium	161
12	Brazil	141
13	Austria	114
14	Russia	102
15	Poland	83

The global Direct Recruitment market amounted to €36.8 billion in 2015, with the USA dominating in terms of country shares (50%) followed by the UK (11%) and Australia (11%)

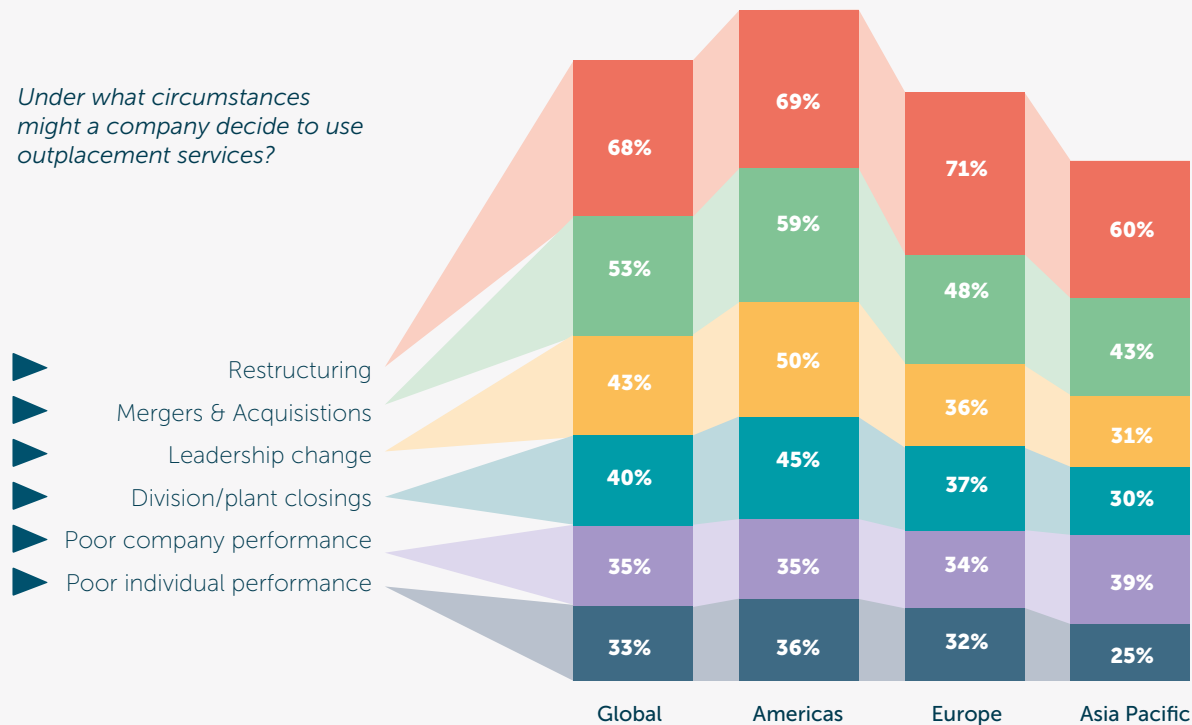
€2.95 billion

Covers career transition and talent management activities at global level

THE CAREER MANAGEMENT MARKET

Business drivers for providing outplacement

Under what circumstances might a company decide to use outplacement services?



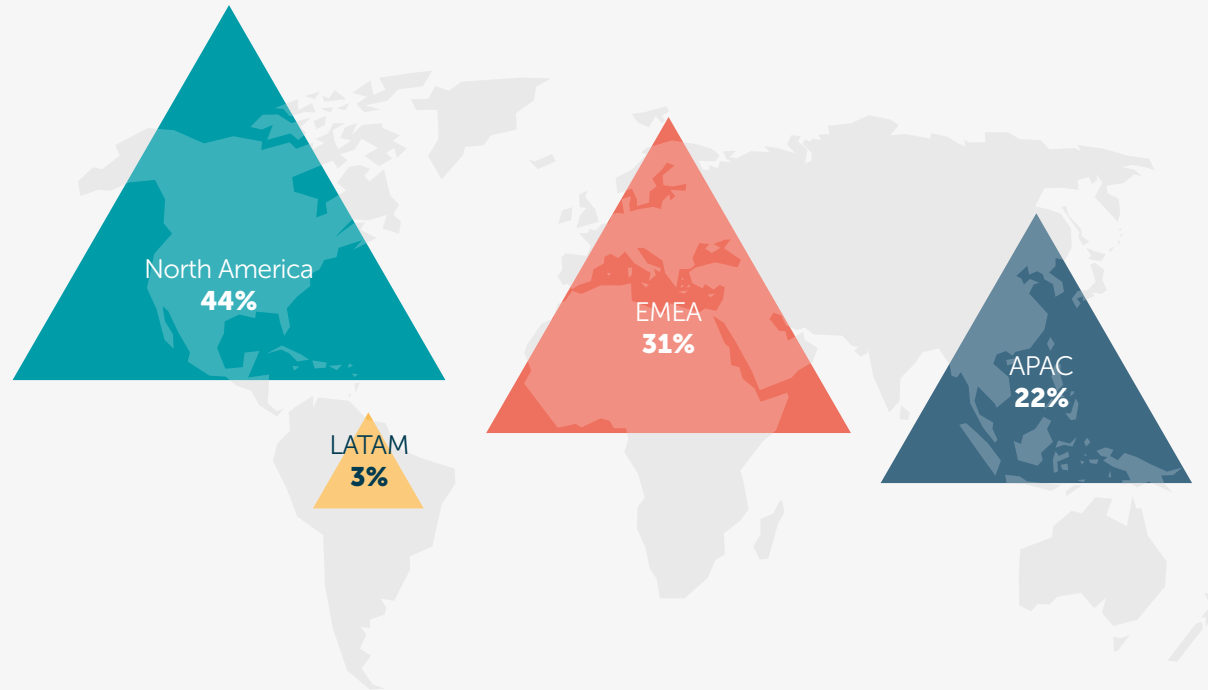
Source: Right Management – Why organisations rely on outplacement – 2016

THE RPO MARKET

Global
market size
of
**€3.3
billion**
(sales revenues)

2015 RPO market size – Global & Regions (€ billions)

The global market size for Recruitment Process Outsourcing (RPO) is estimated at €3.3 billion for 2015. North America dominates the market (44% of market share), followed by the EMEA region (31%) and Asia Pacific (22%).



Source: Staffing Industry Analysts - Annual 2015 average exchange rate used between \$ and € = 0.9017

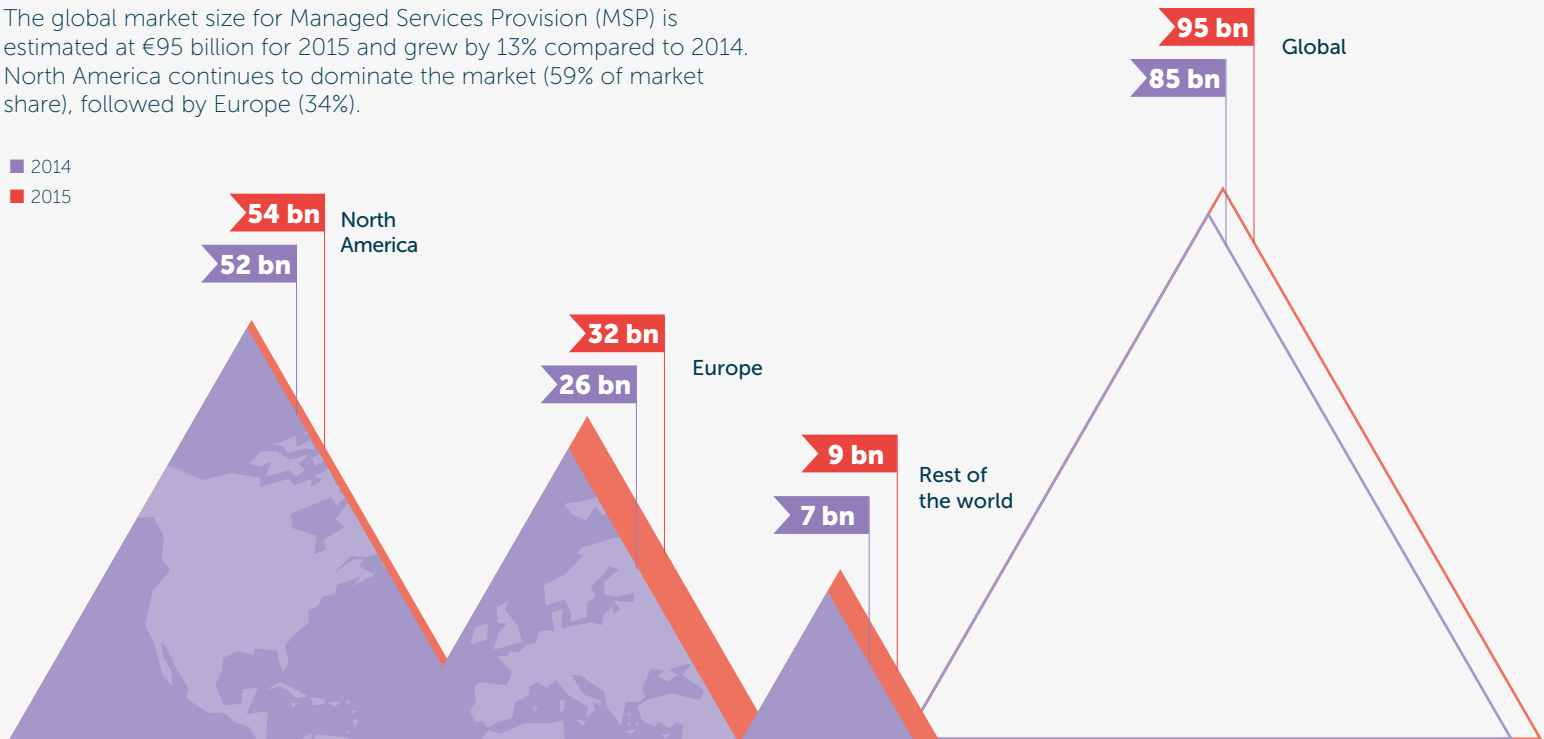
Global
market size of
€95 billion
(sales revenues)

THE MSP MARKET

MSP market size – Global & Regions (€ billions)

The global market size for Managed Services Provision (MSP) is estimated at €95 billion for 2015 and grew by 13% compared to 2014. North America continues to dominate the market (59% of market share), followed by Europe (34%).

■ 2014
■ 2015



Source: Staffing Industry Analysts - Annual 2015 average exchange rate used between \$ and € = 0.9017



1- Enabling Work

Each year, around 50 million people access the labour market thanks to an employment agency (43 million of whom via agency work). On average, 17% of them are students working while studying and 81% of agency workers are satisfied with their work (with 34% being very satisfied). In terms of penetration rate, agency work accounts for 1.7% of the global working population. With a global turnover amounting to €417 billion and 1.5 million HR consultants, the industry generates an important economic added value to society.



50 million people

access the labour market thanks to an employment agency each year



with **€417 bn**
global turnover,

the industry generates an important economic added value to society



81% of agency workers are **satisfied with their work** (with 34% being very satisfied)

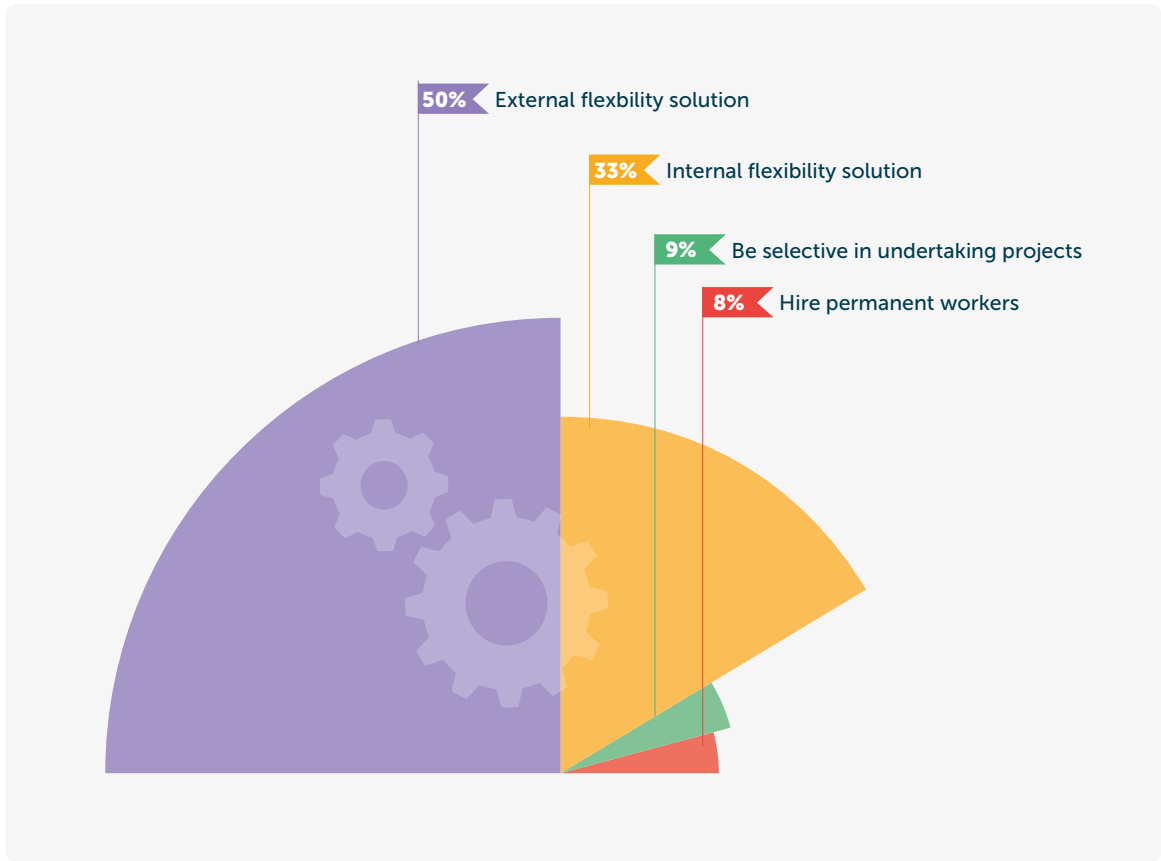


would not hire permanent jobs if agency work was not available

CREATE MORE WORK OPPORTUNITIES

In India, agency work creates jobs that would not otherwise exist : 92% of companies would not hire permanent jobs if agency work was not available. 83% of companies would opt for external/internal flexibility solutions rather than recruiting directly.

Not adopting flexi staffing does not necessarily create new permanent jobs



Source: ISF Report 2016, Turning available work into jobs Work, outsourcing, overtime, reskilling, transfers, etc.



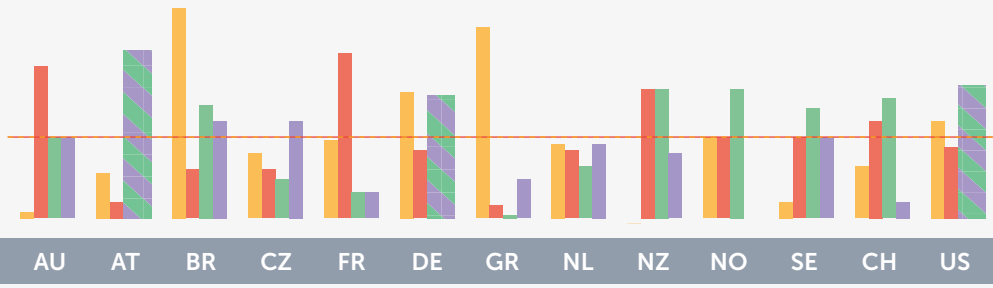
only of agency workers get back to unemployment after temping



Situation before and after working as an agency worker

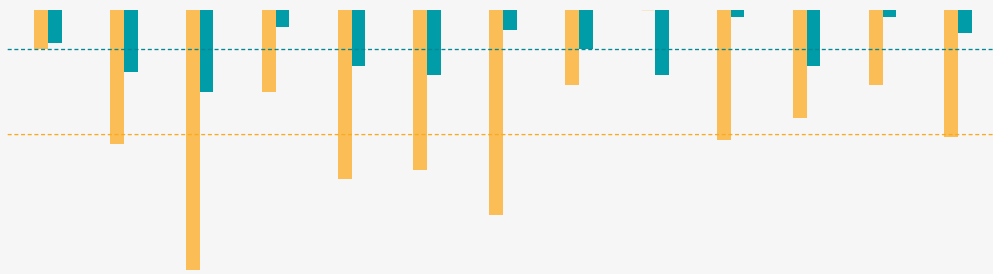
Unemployed	2%	14%	65%	20%	24%	39%	59%	23%	0%	25%	5%	16%	30%
Agency Work	47%	5%	15%	15%	51%	21%	4%	21%	40%	25%	25%	30%	22%
Fixed term	25%	52%	35%	12%	8%	38%	1%	16%	40%	40%	34%	37%	41%
Open ended	25%		30%	30%	8%		12%	23%	20%	—	25%	5%	

AFTER
(12 months later)



Average: 25%

BEFORE



Unemployed	12%	41%	80%	25%	52%	49%	63%	23%	20%	40%	33%	23%	39%
Inactive	10%	19%	25%	5%	17%	20%	6%	12%	na	2%	17%	2%	7%

Average inactive: 12%
Average unemployed: 38%
} Together: 50%

PROVIDE A STEPPING STONE

While 50% of agency workers were unemployed or inactive before temping, only 25% of them get back to unemployment 12 months later



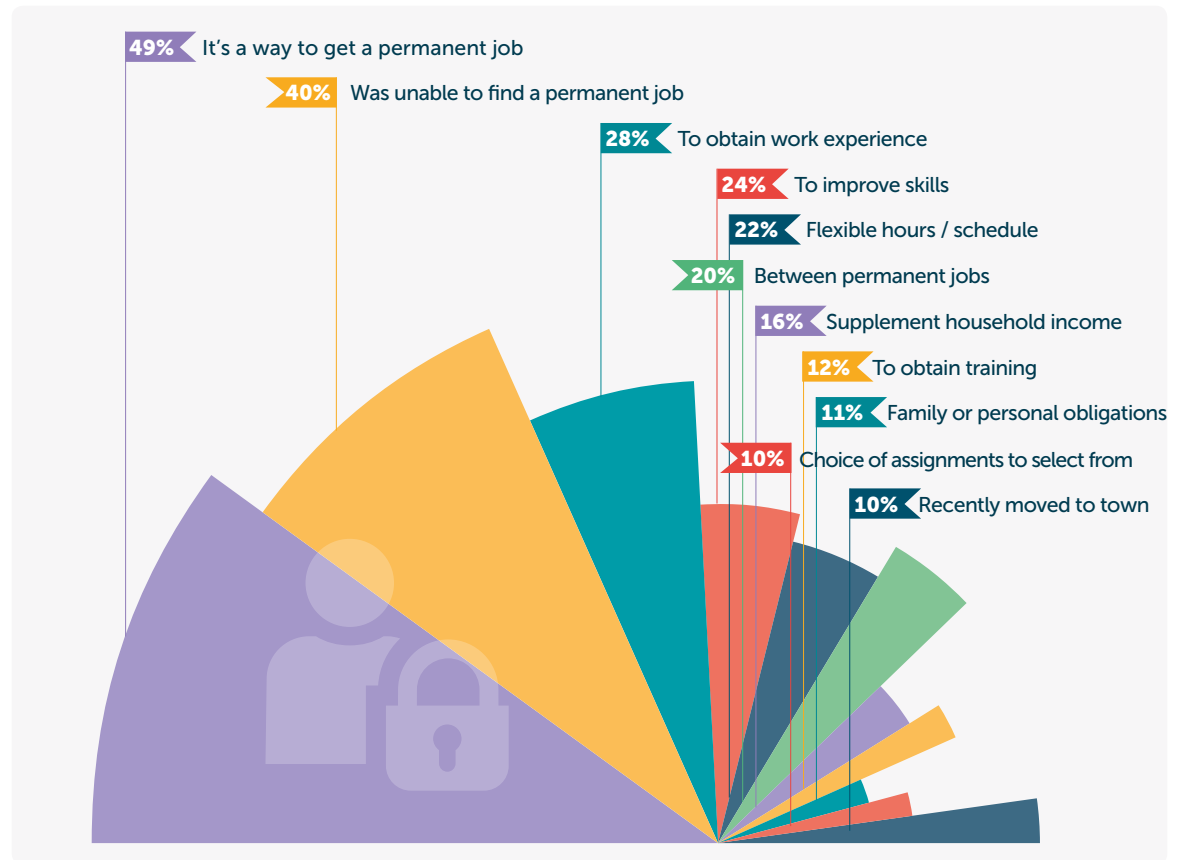
Find it's a way to get a permanent job

PROVIDE A STEPPING STONE

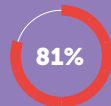
Opportunity to get a permanent contract is main reason to work through agency work (USA)

Note: multiple responses allowed. Reasons with <10% excluded from graph.

Reasons for choosing agency work



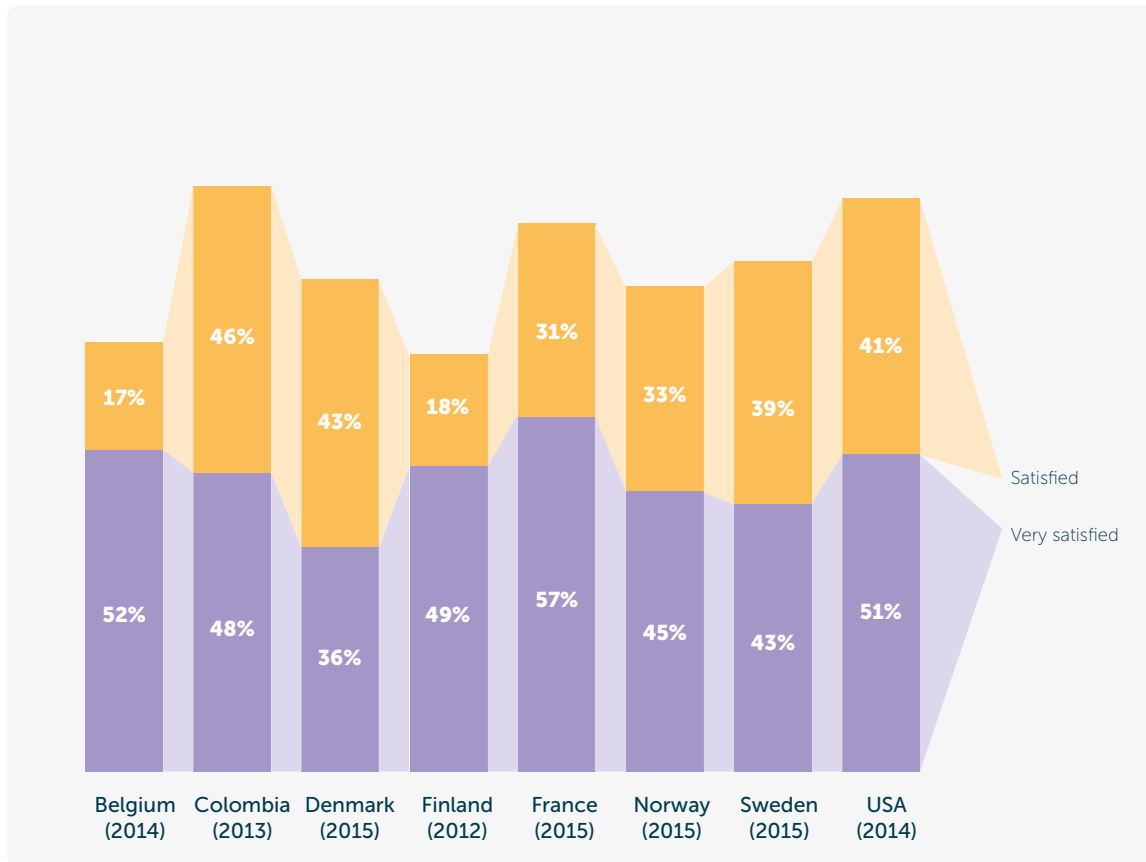
Source: American Staffing Association, 2014 Staffing Employee Survey



are satisfied with their work



Satisfaction of agency workers with their work



DELIVER QUALITY AND MEANINGFUL WORK

On average, 81% of agency workers are satisfied with their work (with 34% being very satisfied)

Note: USA: categories are: "somewhat satisfied (18%) + very satisfied (33%)" and "extremely satisfied"

Source: the World Employment Confederation national federation members



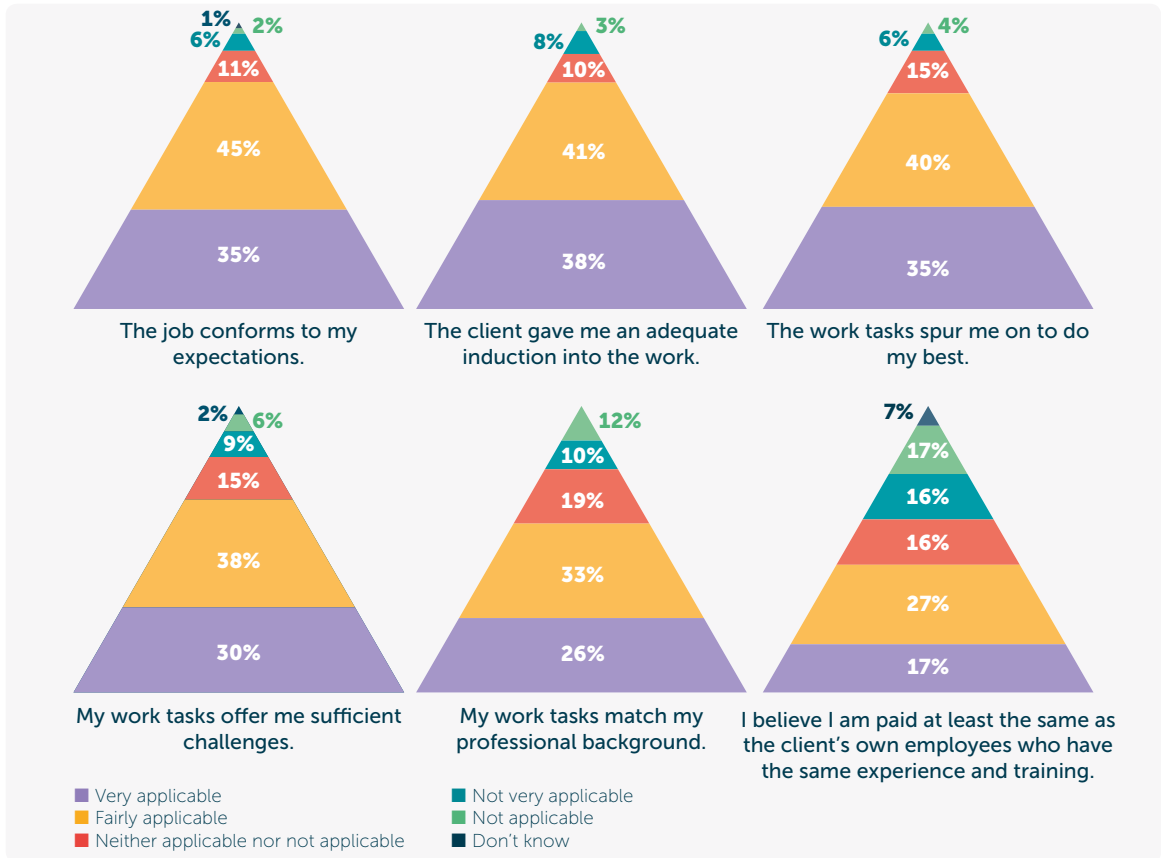
68% are satisfied with their working conditions

DELIVER QUALITY AND MEANINGFUL WORK

In Norway, agency workers are satisfied with most of their working conditions

Note: n=2137

Satisfaction of agency workers with their working conditions (Norway)



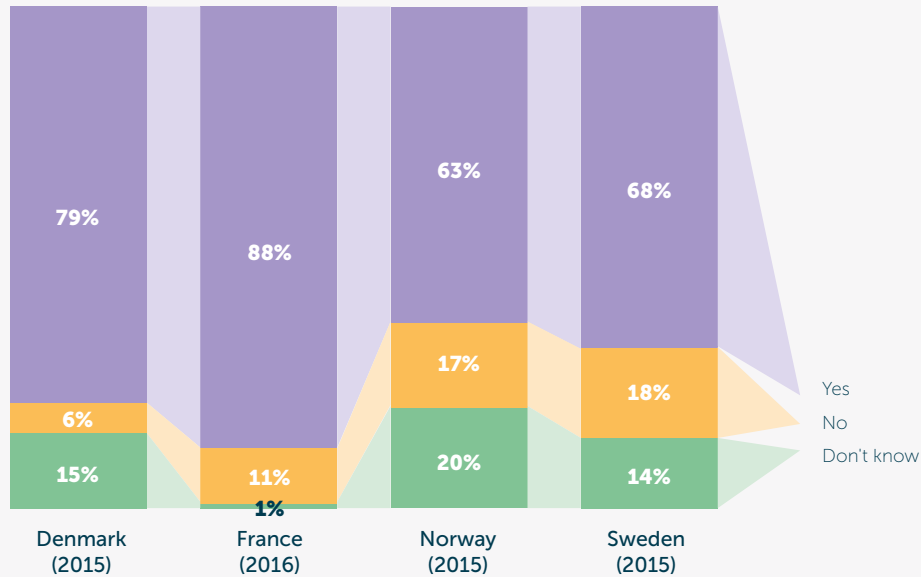
Source: NHO - 2016



would recommend
agency work



Agency workers would recommend agency work to friends and relatives



DELIVER QUALITY AND MEANINGFUL WORK

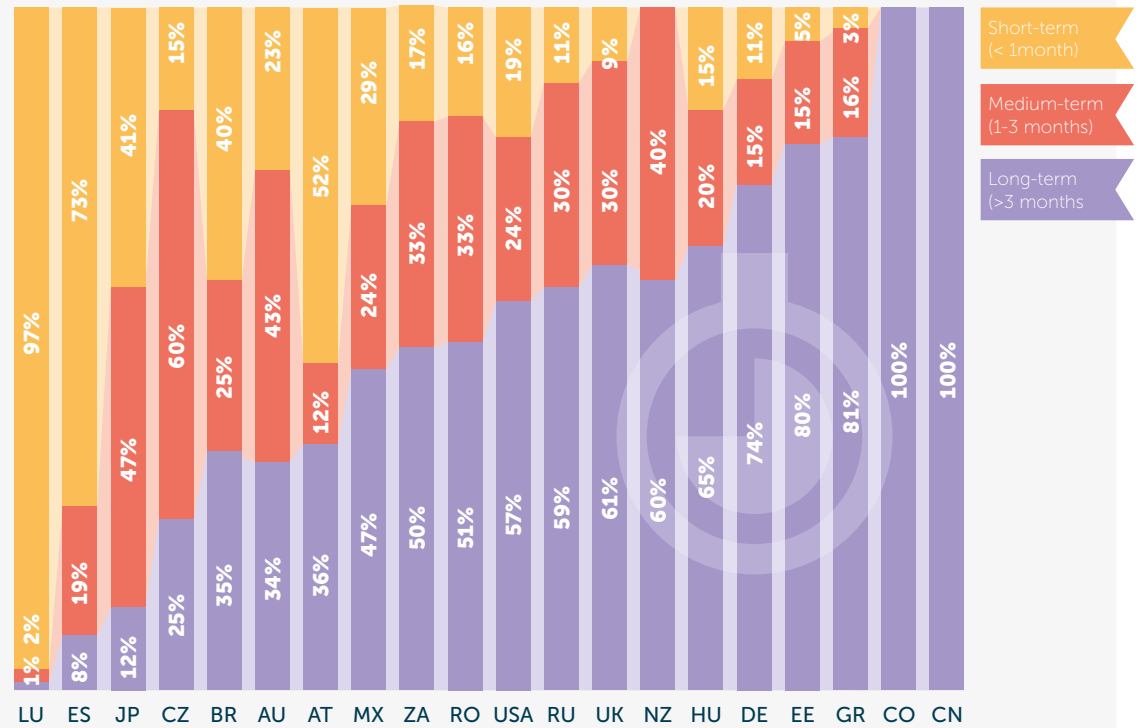
On average, 75% of agency workers would recommend agency work to friends and relatives



On average, 53% of assignments are longer than 3 months

DELIVER QUALITY AND MEANINGFUL WORK

Average length of assignment



Source: National federations of World Employment Confederation



In Norway, 46% of agency workers got a job within 1 week



How fast did you get an assignment through the employment agency? (Norway)



Source: NHO - 2016

IMPROVE
ACCESS TO &
TRANSPARENCY
OF LABOUR
MARKET

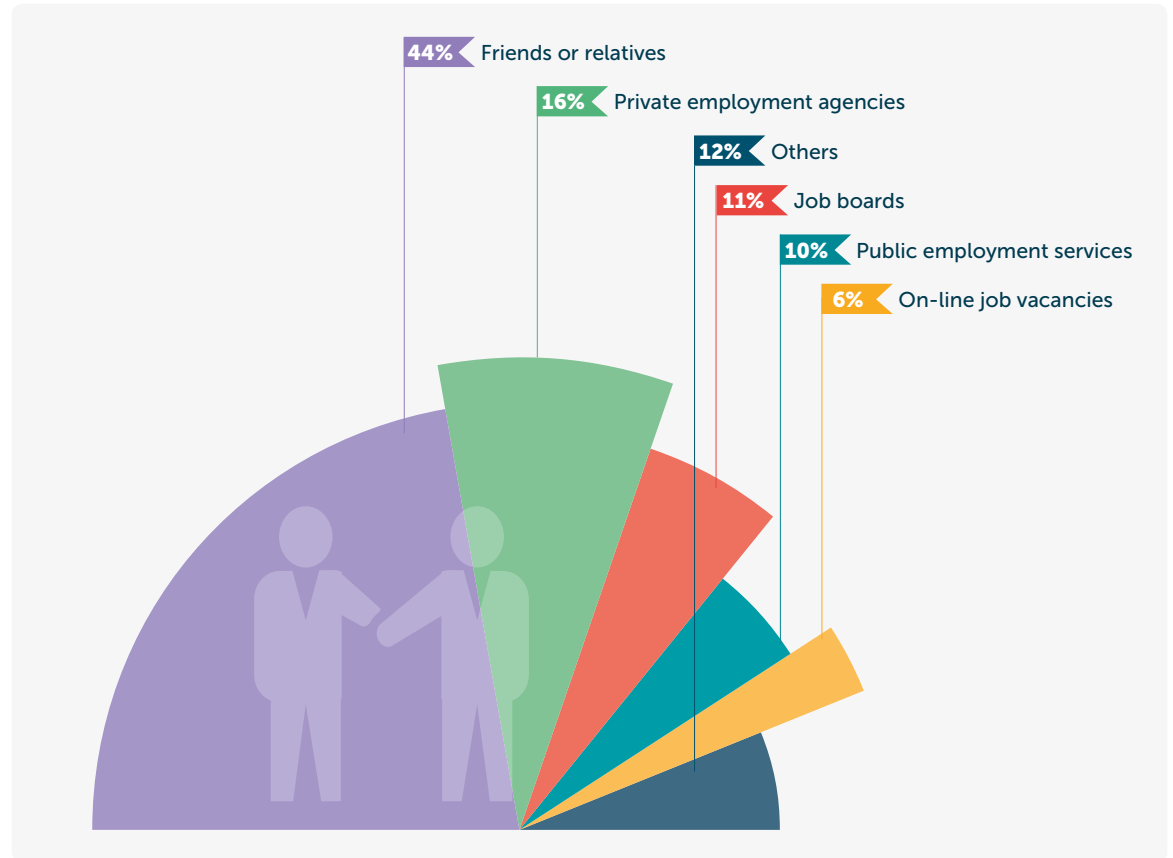


trust best employment agencies to find a job

IMPROVE ACCESS TO & TRANSPARENCY OF LABOUR MARKET

Employment agencies are second best channel to find work for job seekers (France), ahead of public employment services

As a jobseeker, who would you trust best to find a job? (France)



2- Enabling Adaptation

In a changing world of work, the employment industry supports over 5 million companies each year to adapt to an increasingly volatile environment. On the workers' side, 62% of agency workers in the USA agree that they developed new skills or improved their skills while temping. In France, 90% of agency workers say temping is useful to acquire professional experience and 78% to get trained.



62% of agency workers developed new skills or improved their **skills** while temping



90% of agency workers say temping is useful to acquire **professional experience**



78% of agency workers say temping is useful to **get trained**





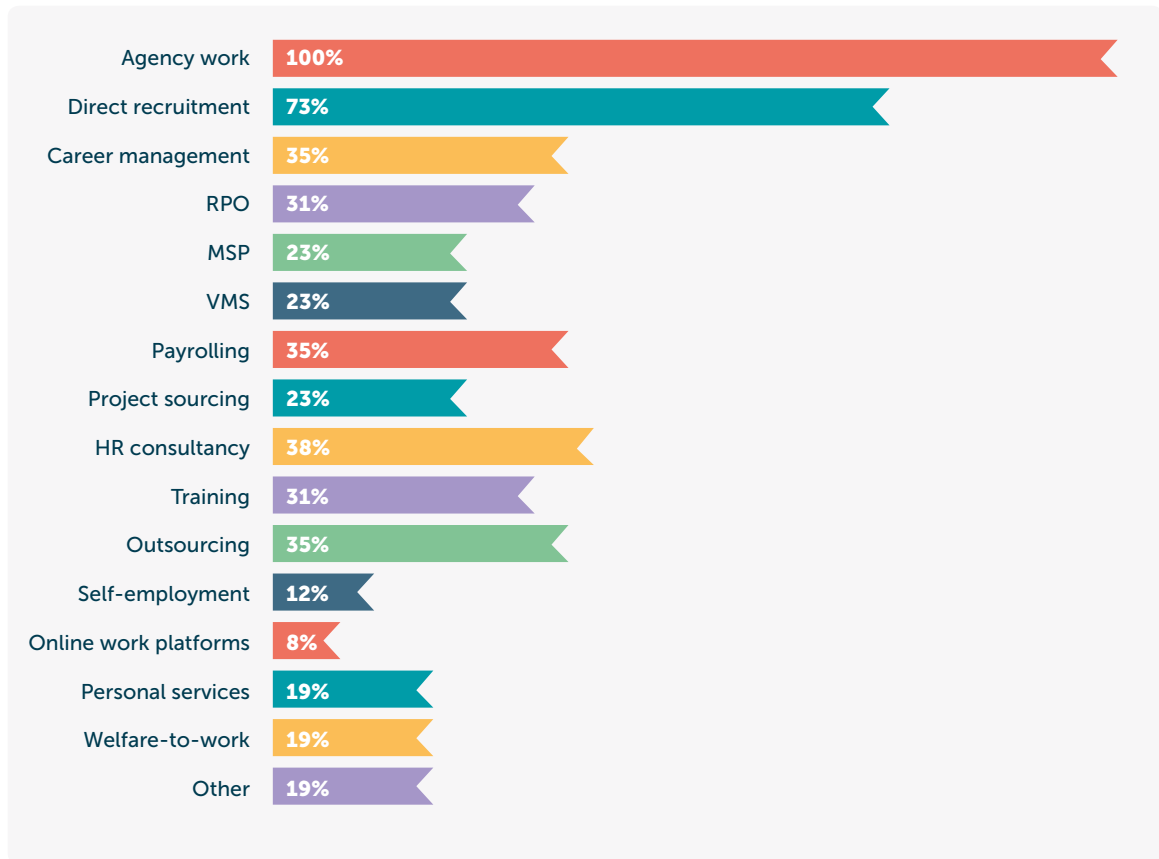
Over 16

different HR services are provided by the World Employment Confederation members

DELIVER DIVERSIFIED WORKFORCE SOLUTIONS

Members of the World Employment Confederation represent a large range of HR services, allowing to provide for tailor-made solutions to people and companies

Services provided by the members of the World Employment Confederation

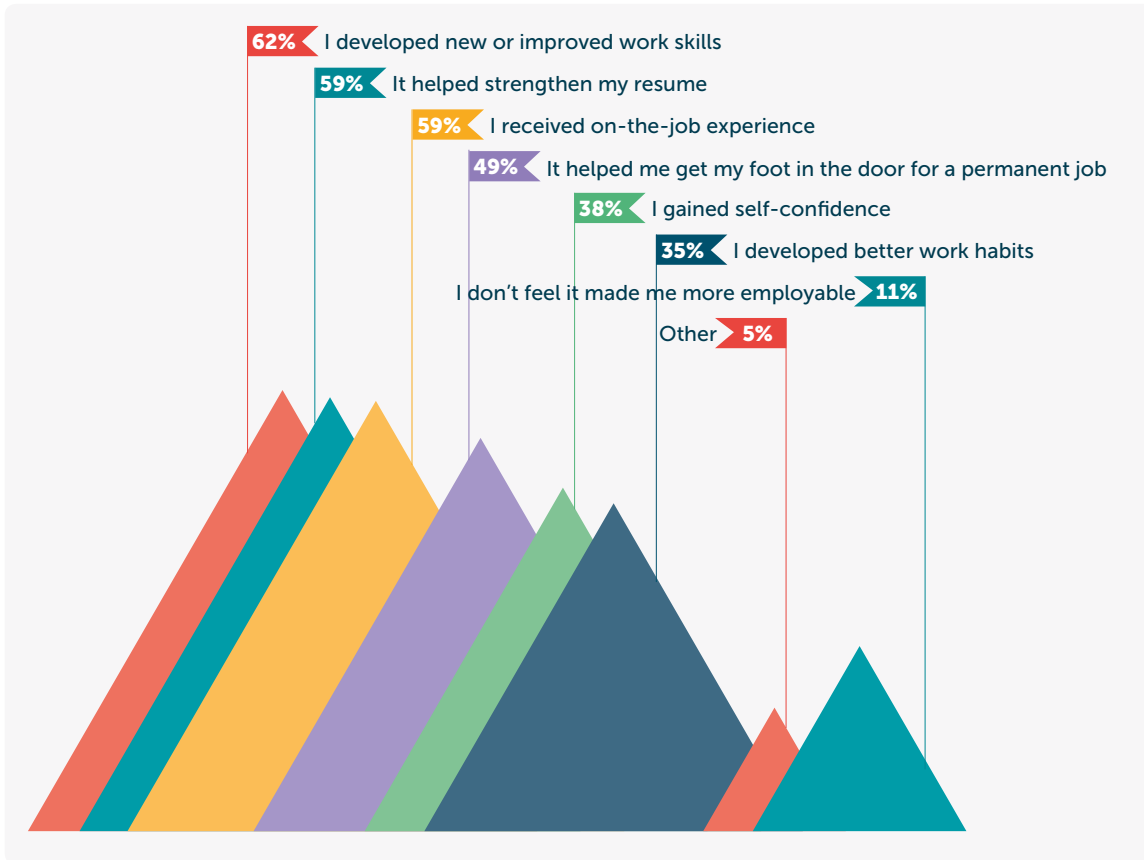


Source: National federations of World Employment Confederation

62%

of US agency workers say agency work made them more employable

What were the main benefits of using agency work? (USA)



Source: American Staffing Association, 2014 Staffing Employee Survey

IMPROVE EMPLOYABILITY BY UPSKILLING

62% of US agency workers say agency work made them more employable

Note: multiple responses allowed



ENABLING ADAPTATION



to acquire professional experience

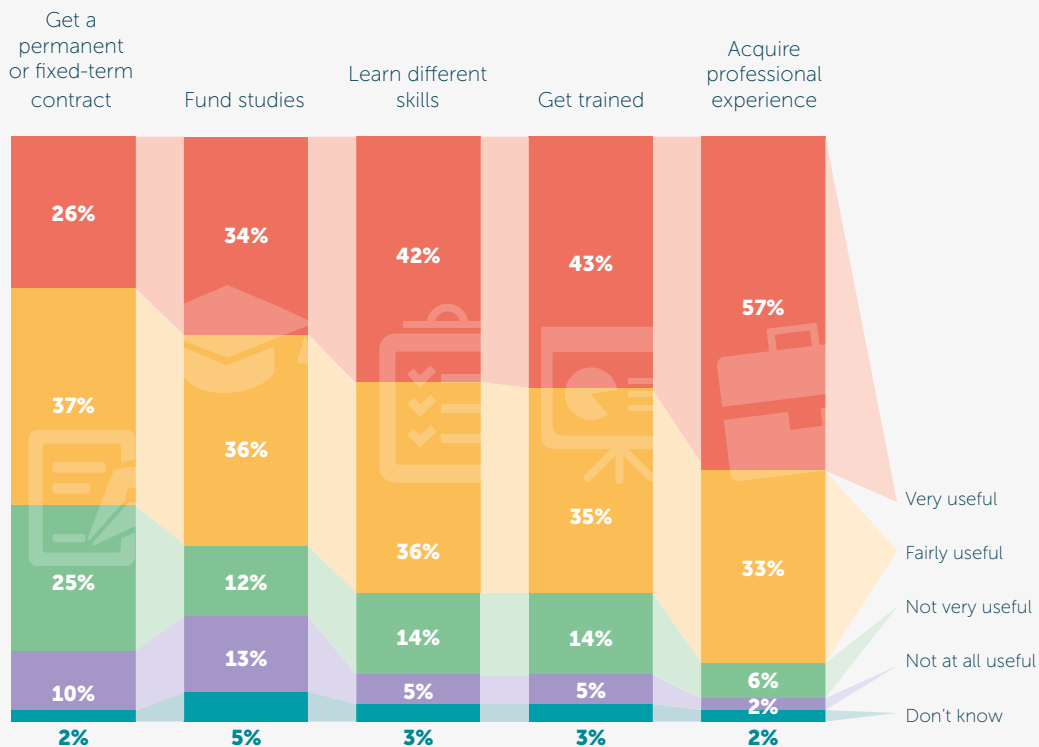


to get trained

IMPROVE EMPLOYABILITY BY UPSKILLING

90% of agency workers say temping is useful to acquire professional experience and 78% to get trained (France)

Why agency workers say temping is useful (France)





600.000

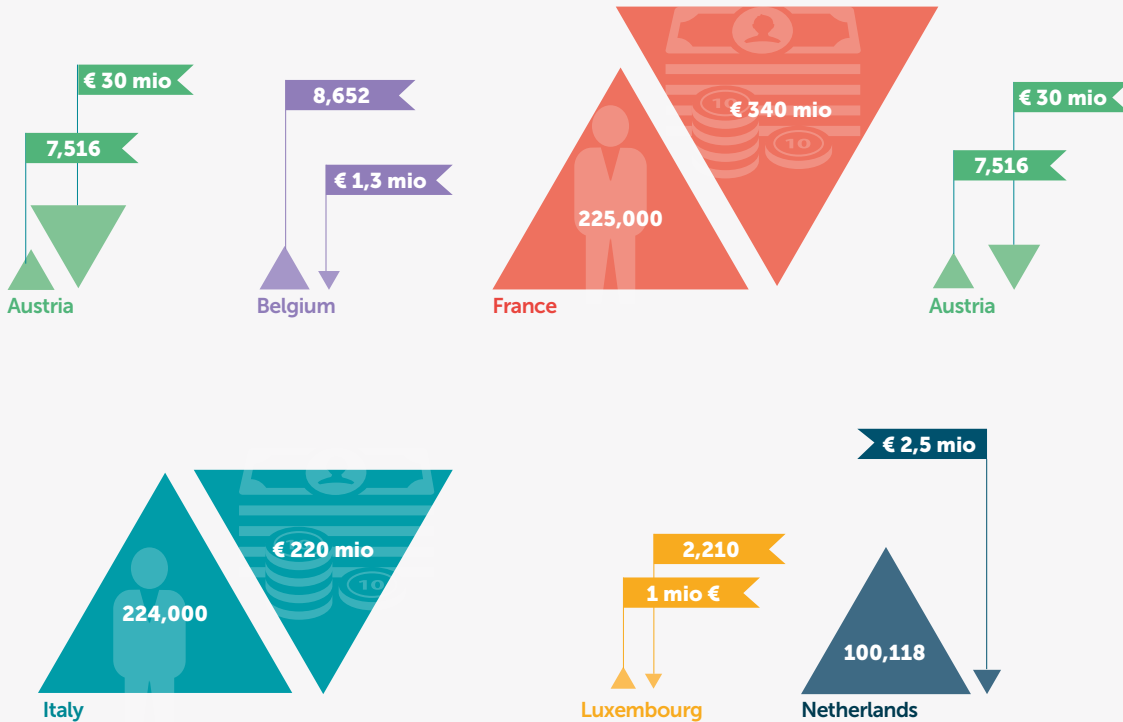
agency workers trained via bipartite funds in 6 European countries in 2015



€604+ million invested by the employment industry on training agency workers in 2015

Budget spent on training agency workers via bipartite funds - 2015

- ▲ Number of workers trained via AW bipartite training fund
- ▼ Budget of bipartite training funds (€ million)



Source: National federations of World Employment Confederation

IMPROVE EMPLOYABILITY BY UPSKILLING

Note: these figures do not comprise number of agency workers directly trained by companies



ENABLING ADAPTATION



Agriculture
3%



Manufacturing
34%



Construction
8%



Services
36%



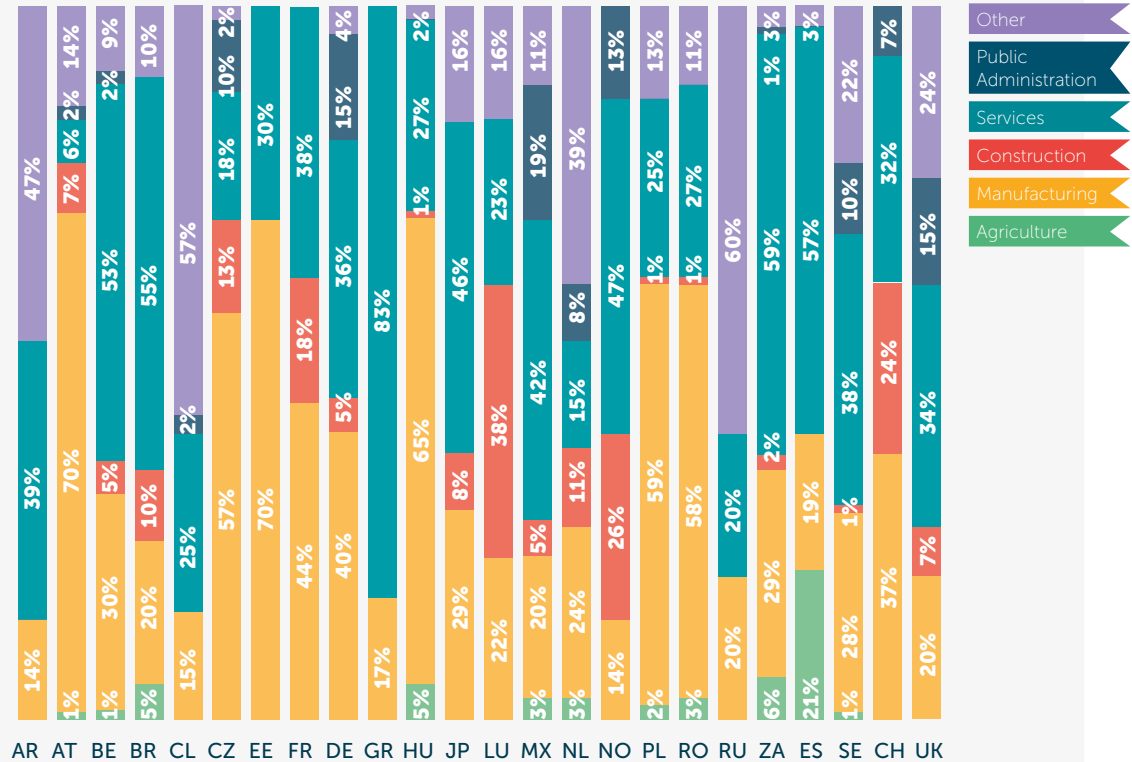
Public Administration
20%

FACILITATE WORK TRANSITION & MOBILITY

Serving almost every economic segments, the employment industry facilitates workers' transitions from one sector to another

Note: In the UK, a small portion of the agency workers listed in the Public Administration (notably in the Healthcare & Education sectors) are active in the private sector

Sectoral distribution of agency workers



Source: National federations of World Employment Confederation & Offices for National Statistics



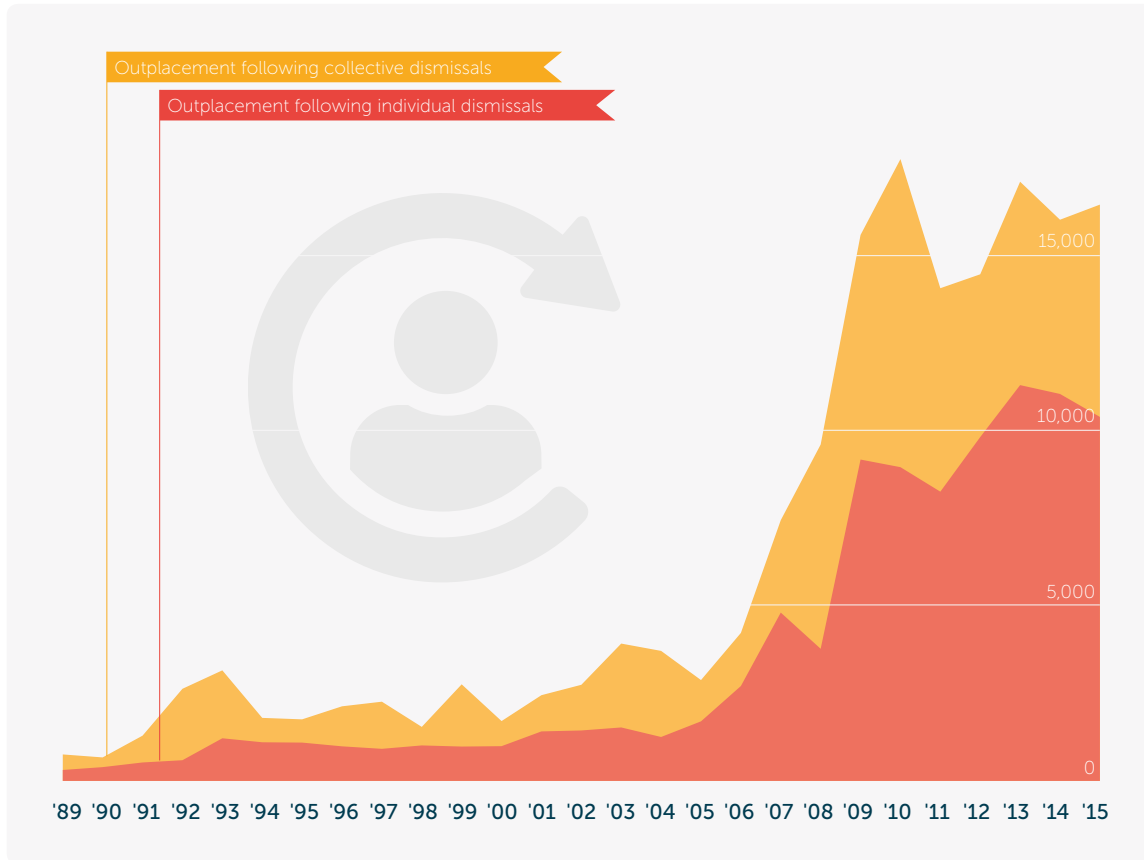
16,442

In Belgium, outplacement services supported 16,442 persons in transition



of them being aged 45+

In Belgium, outplacement services are experiencing a rise again



Source: Federgon – Annual Report 2016

FACILITATE WORK TRANSITION & MOBILITY

Outplacement services accompany 3 million people finding a new job (global)



ENABLING ADAPTATION

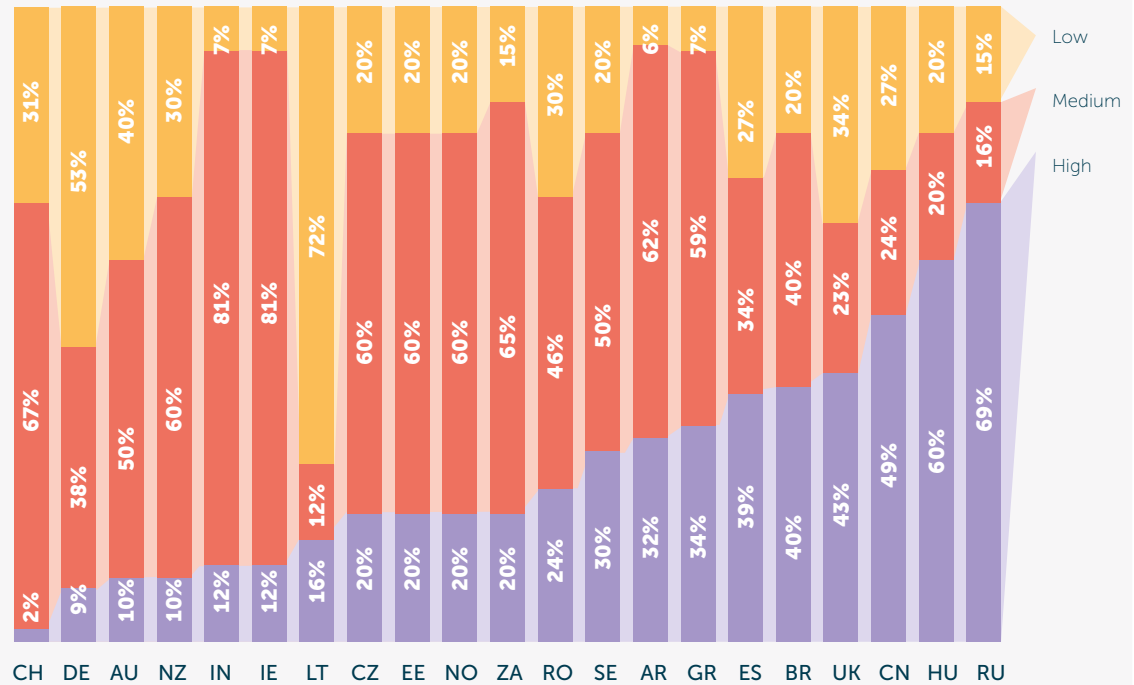
Average level
of skills



FACILITATE WORK TRANSITION & MOBILITY

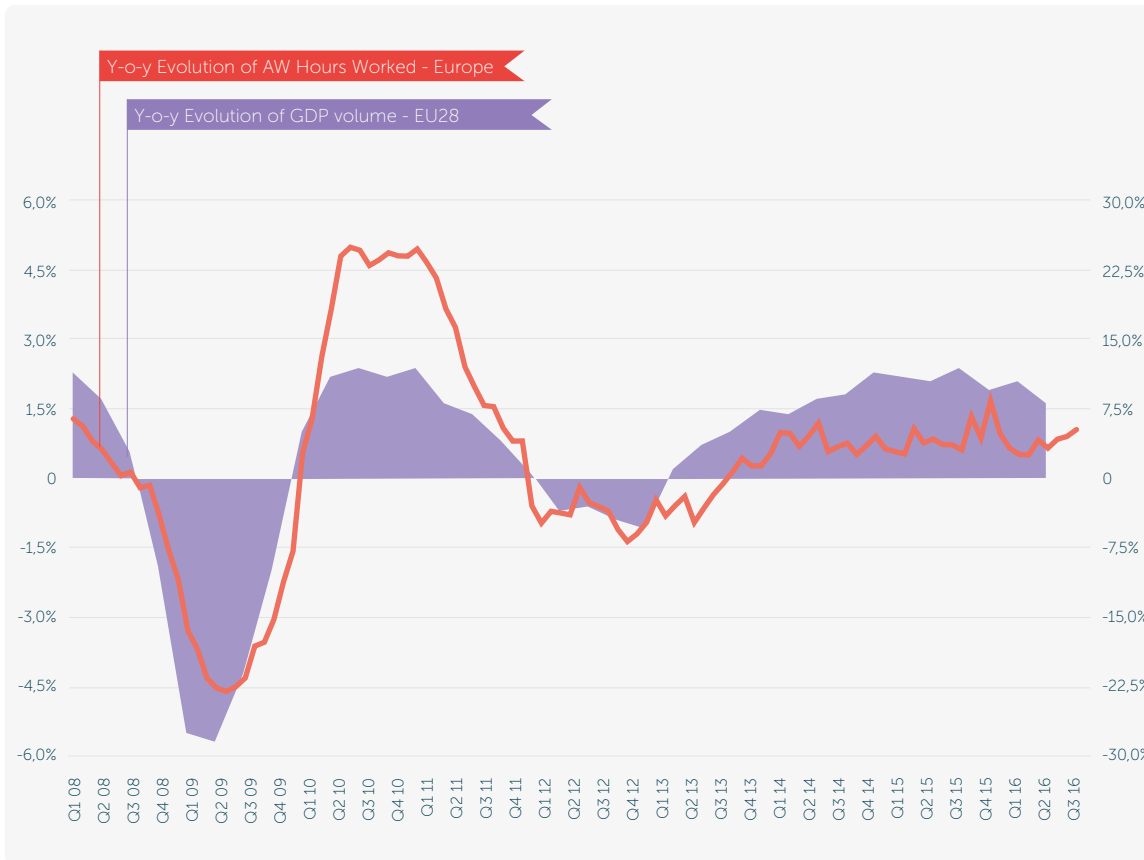
The employment industry is able to source and match very different levels of skills, depending on the needs expressed by companies.

Skills required by job executed



Source: National federations of World Employment Confederation

Evolution of number of hours worked by agency workers in Europe (year-on-year) versus evolution of GDP volume EU28



Source: National federations of World Employment Confederation

ADAPT WORKFORCE TO PRODUCTION NEEDS

The employment industry reduces the time lag between recovery and job creation: there is a close correlation between the evolution of number of hours worked and the evolution of GDP (while it usually takes 3 to 6 months for the overall employment rate to adapt to the economic fluctuations)



ENABLING
ADAPTATION



84% of German companies hire agency workers to adapt production capacity at short notice



63% of Indian companies use agency work for greater flexibility in workforce planning

ADAPT WORKFORCE TO PRODUCTION NEEDS

- 1 Flexi staffing allows a business to manage transient manpower demand / supply fluctuations due to business cyclicality, and/or temporary absence of regular employees
- 2 Costs associated with payroll processing and administration, payment of benefits, etc. can be transferred to the flexi staffing agency
- 3 Employers can test flexi workers on the job for their skills and temperament, and top performers can later be absorbed into the regular payroll
- 4 Utilisation of flexi staff reduces search and recruitment time as well as cost
- 5 In an environment of economic uncertainty coupled with rigid labour laws, businesses are reluctant to expand regular payroll before being certain about business growth
- 6 Enables businesses to focus on their core activities, while outsourcing support services
- 7 Easy availability of un-skilled flexi workers has encouraged many businesses to follow just-in-time flexi hiring

Reasons that are "Important to very important" for companies to hire agency workers

Germany



India



Source: Zeitarbeit in Deutschland – Treiber für Flexibilität und Wachstum, IW Consult GmbH, 2011

Source: based on the responses of senior HR officials of select Rg 5 billion plus companies from 15 different sectors

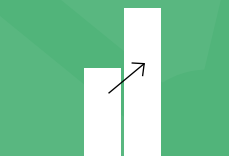
3- Enabling Security

On average, before entering into agency work, 33% of workers were unemployed, while afterwards only 21% went back to unemployment. Similarly, 43% of people starting agency work were employed before, while 71% remain in employment afterwards. From the business side, 50% of UK companies recognise that agency work is important to secure short term access to key strategic skills. Companies using innovative workforce solutions such as RPO or MSP are able to reduce hiring costs by 38%.



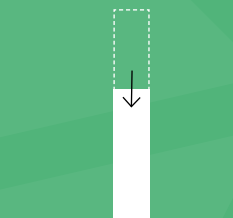
33% of workers were unemployed before agency work, while

**only 21%
went back to
unemployment**



43% of people starting agency work were employed before,

**while 71%
remain in
employment.**



Using innovative workforce solutions such as RPO or MSP


**reduces hiring
costs by 38%**



DELIVER PORTABLE RIGHTS

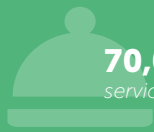
The employment industry has developed innovative solutions to implement portable & transferable social rights via bipartite sectoral funds

Bipartite funds in European countries offer extra social protection to agency workers

	Social benefits	Training	Healthcare Schemes (complimentary)	Health & Safety at work	Inclusion & coaching	Pension (third pillar)
AT						
BE						
FR						
IT						
LU						
NL						
CH						 



268,000
information requests
managed

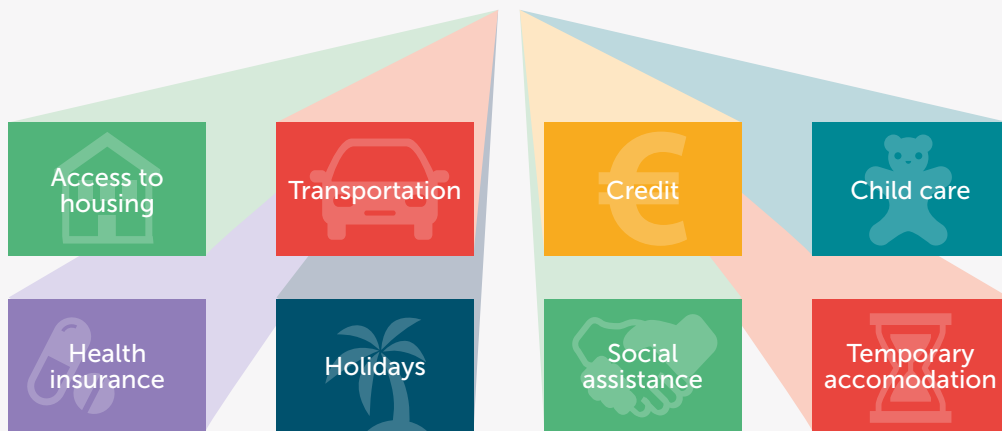


70,000
services delivered



€22 million
invested for agency
workers

Range of services delivered by Fastt (French social bipartite fund)



DELIVER PORTABLE RIGHTS

The French social fund for the agency work sector (Fastt) delivered 70,000 services in favour of agency workers in 2015 by designing innovative solutions



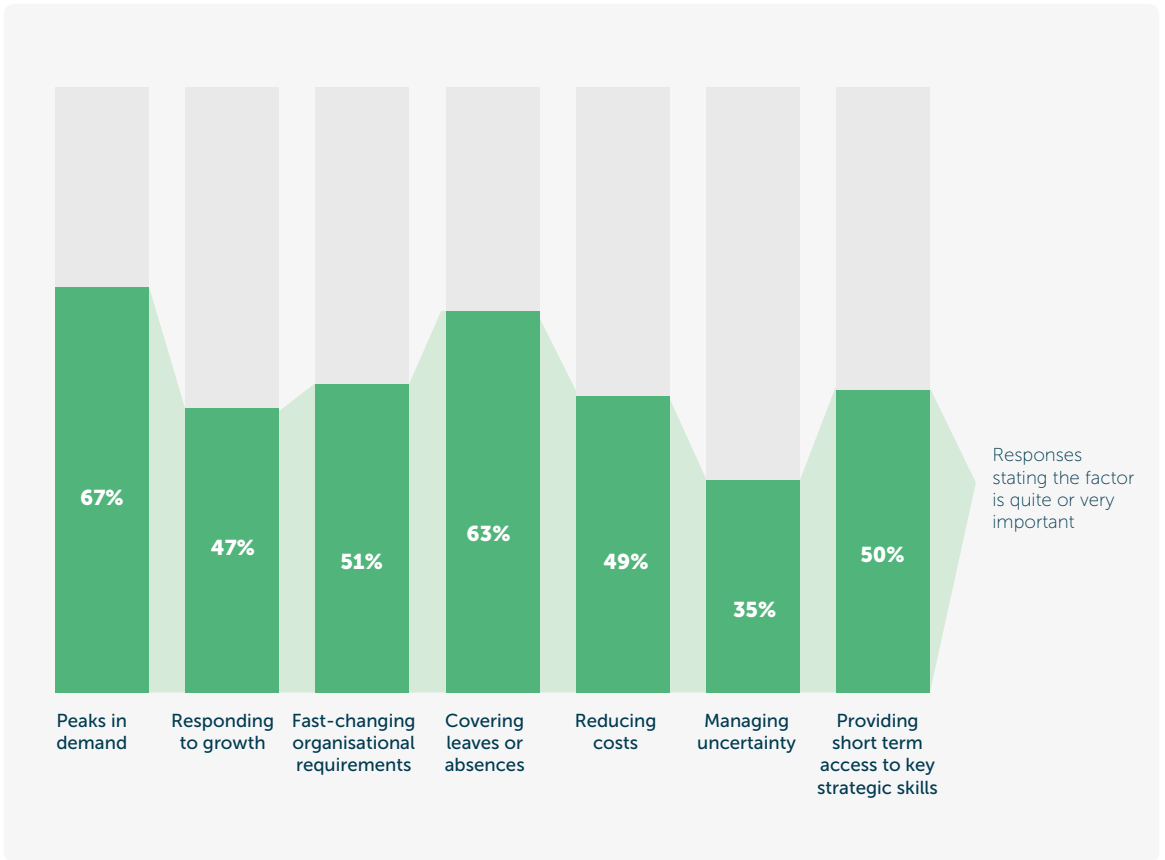
ENABLING
SECURITY

SECURE ACCESS TO TALENTS

For 50% of UK companies, agency work is important to providing short term access to key strategic skills. This rose to 57% amongst the largest companies (250+ employees).

All who recruit agency workers (n=136)

How would you say that agency workers are for your organisation in terms of the following?





39%

of Belgians see agency work as a stepping stone to permanent work

Top 3 reasons for choosing agency work

Belgium (2016)

- 1 As a stepping stone to permanent work (39%)
- 2 To earn an additional income (10%)
- 3 To gain useful working experience (6%)

France (2015)

- 1 Agency work allowed me to find work quickly (52%)
- 2 Couldn't find a permanent job (37%)
- 3 Hope to get a permanent job via agency work (22%)

USA (2014)

- 1 It is a stepping stone to a permanent job (49%)
- 2 Was unable to find a permanent job (40%)
- 3 To obtain work experience (28%)

Denmark (2016):

- 1 It is a stepping stone to a permanent job (25%)
- 2 Work as agency worker is easier to get than other job (17%)
- 3 To gain more work experience (12%)

Norway (2015)

- 1 Agency work is a good entry door to working life (40%)
- 2 Work as agency worker is easier to get than other job (37%)
- 3 Want to see different workplaces and gain all-round work experience (23%)

Sweden (2015)

- 1 The agency offered an interesting assignment (38%)
- 2 I want to see different workplaces and acquire different experiences (33%)
- 3 Work as agency worker is easier to get than other job (32%)

UK (2014)

- 1 I could not find permanent work (53%)
- 2 To find work quickly (43%)
- 3 To earn money quickly (26%)

Source: National federations of World Employment Confederation

ACT AS CAREER AGENT

The employment industry supports workers in many different ways: quick access to work but also possibility to gain work experience.



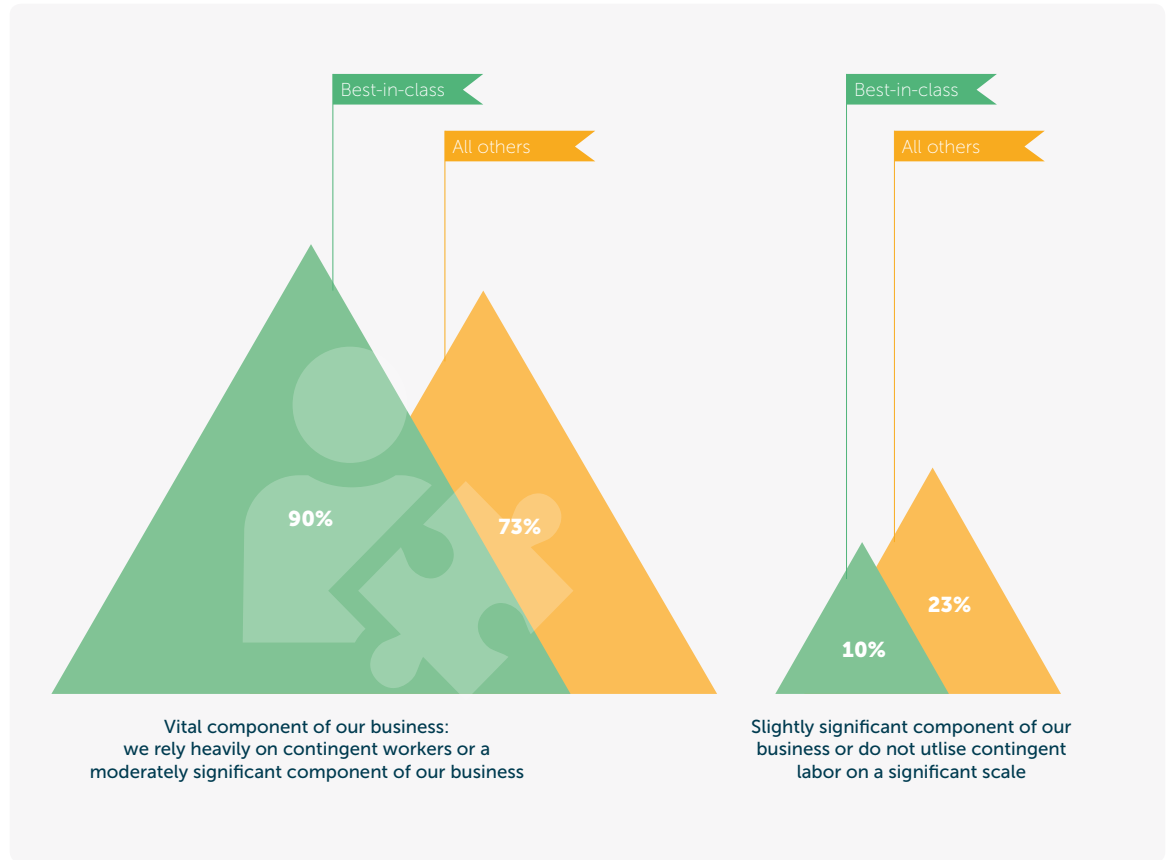
ENABLING
SECURITY

INCREASE BUSINESS COMPETITIVENESS

Most efficient organisations rely to a greater extent on agency and temporary workers to conduct their business

n=192

How do the best-in-class see agency and temporary workers?

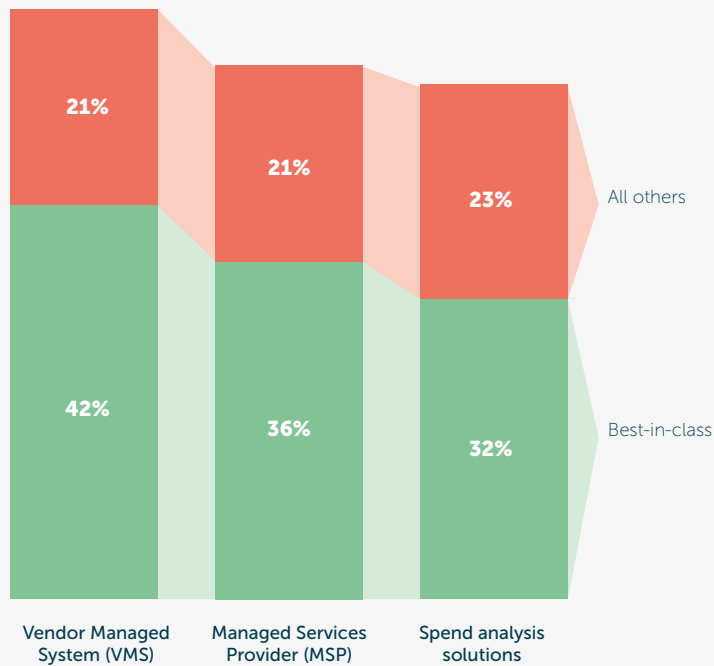


Source: Aberdeen Group

71%

Most efficient organisations are more likely to use a Managed Services Provider

Solutions to manage temporary and agency workers



Source: Aberdeen Group, April 2016

INCREASE BUSINESS COMPETITIVENESS

Most efficient organisations are 71% more likely to use a Managed Services Provider (36% vs 21%) to support the management of agency and temporary workers



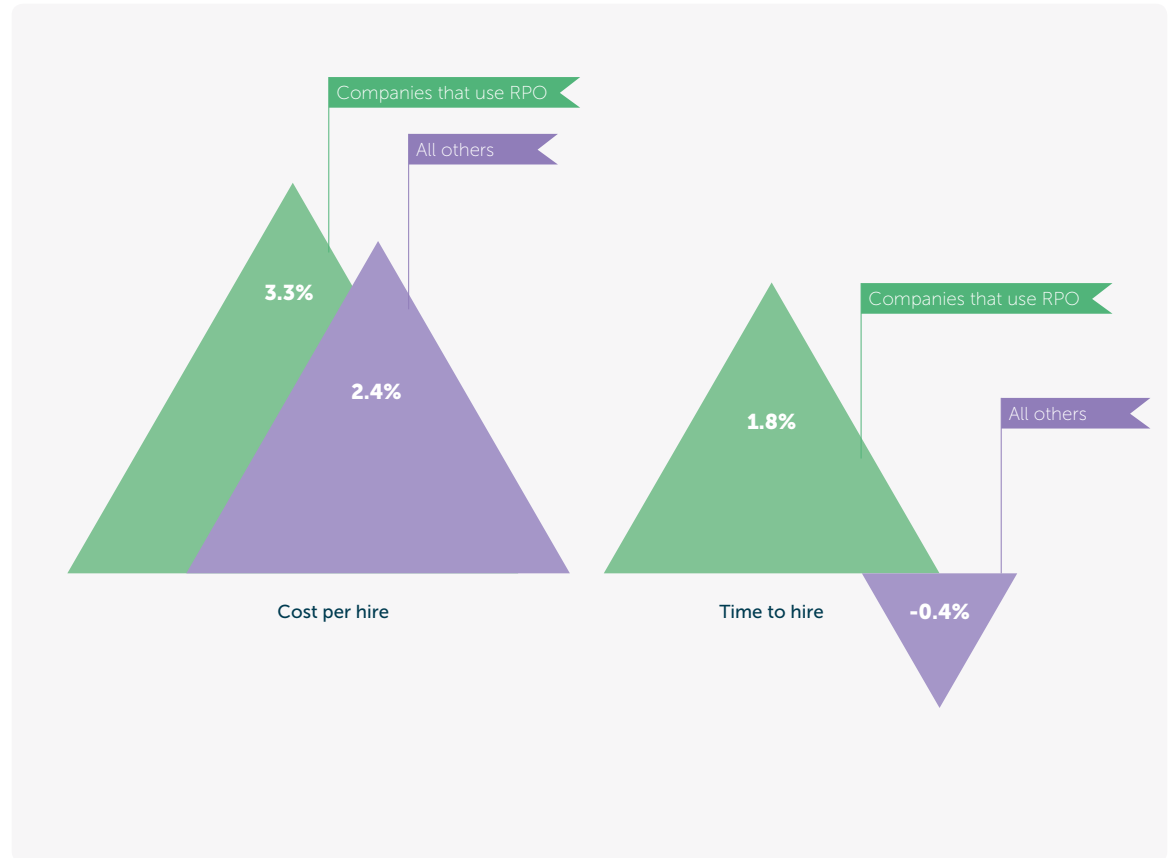
ENABLING SECURITY

38% costs reductions by using a RPO provider

INCREASE BUSINESS COMPETITIVENESS

RPO usage has a big impact on HR KPIs. Companies that invest in an RPO provider are able to reduce hiring costs by 38%

Year-over-year improvement (reduction)



Source: Aberdeen Group, May 2016

4- Enabling Prosperity

By reducing frictional unemployment, the industry contributes to public budgets, saving governments the cost of unemployment benefits. In addition, the provision of flexible workforce solutions leads to a reduction of undeclared work, increasing social charges and corporate tax being paid. Finally, the industry drives inclusiveness and participation to the labour market: 34% of agency workers are younger than 25 years old and 44% are women.

the provision of flexible workforce solutions leads to



of undeclared work,



social charges and corporate tax being paid



34% of agency workers are **younger than 25 years old**



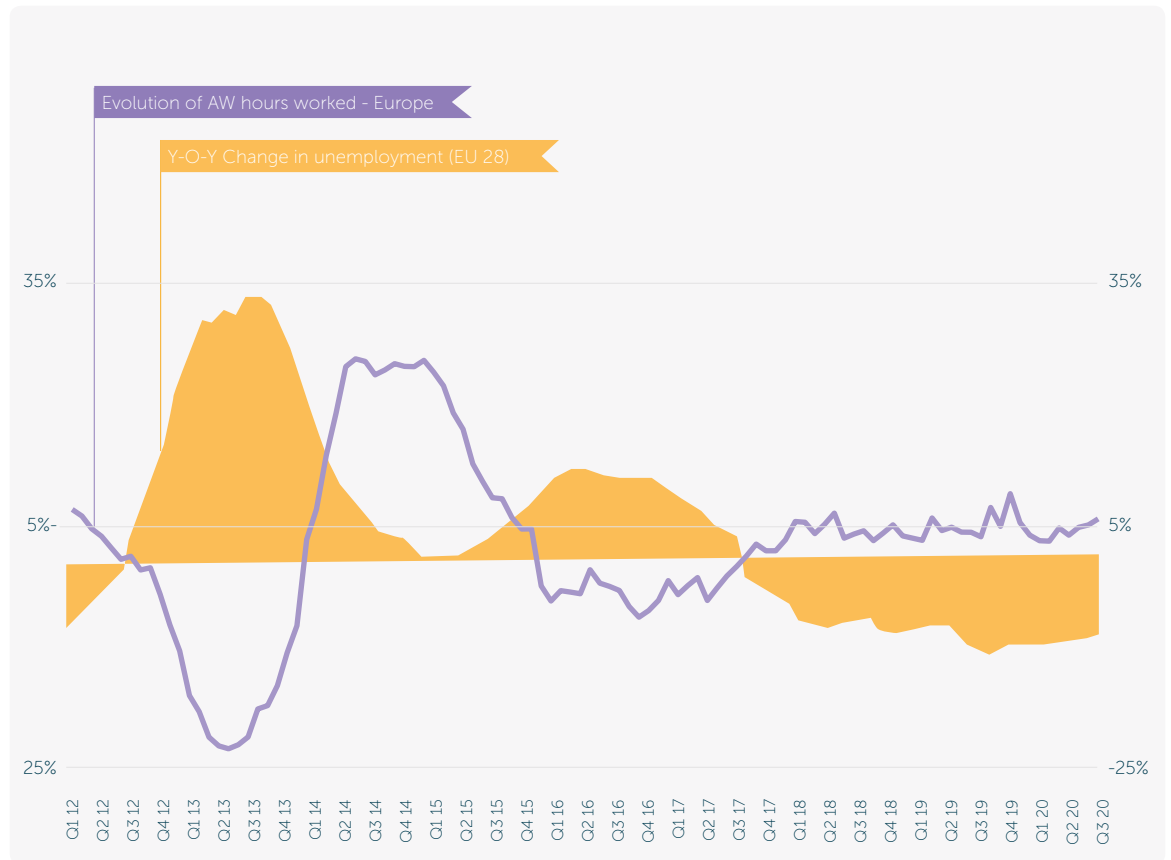
44% of agency workers are **women**



REDUCE UNDECLARED WORK & UNEMPLOYMENT

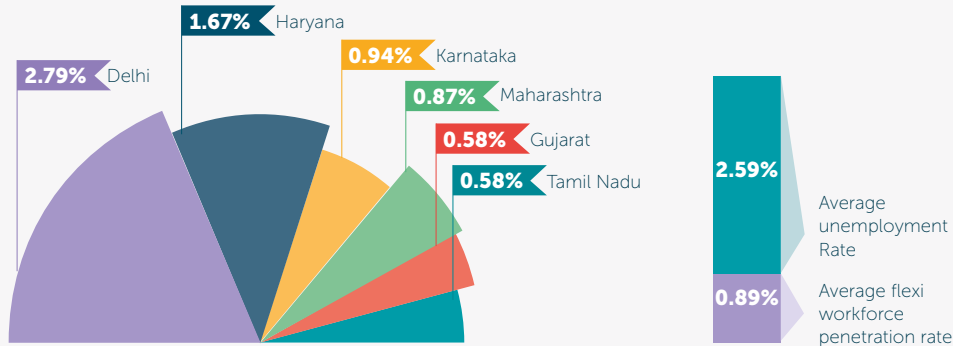
Agency work contributes to reduce frictional unemployment by ensuring a better and faster match between supply and demand of work

Evolution of number of hours worked by agency workers in Europe (year-on-year) versus average EU 28 Unemployment change (year-on-year)

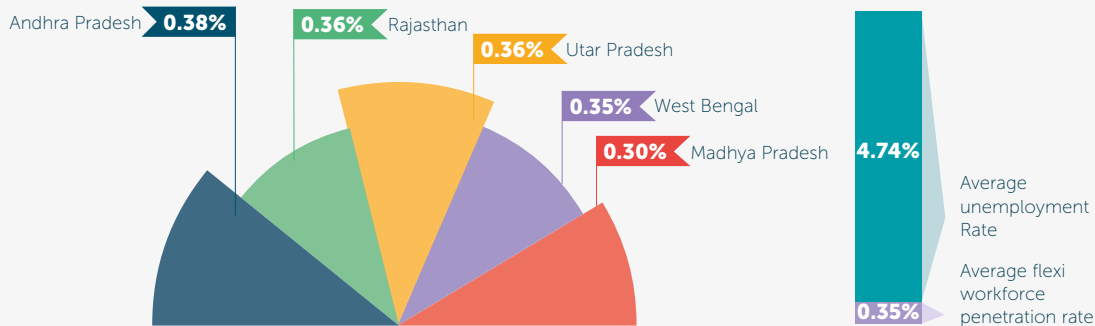


Statewise agency work penetration (% of workforce)

States with **higher** agency work penetration than national average of 0.51% in 2015



States with **lower** agency work penetration than national average of 0.51% in 2015



Source: Nielsen estimates using N550 and Ministry of Labour data

REDUCING UNDECLARED WORK & UNEMPLOYMENT

India : Low average unemployment rate of 2.59% in states with agency work penetration higher than national average of 0.51%

¹ Refers to undivided Andhra Pradesh



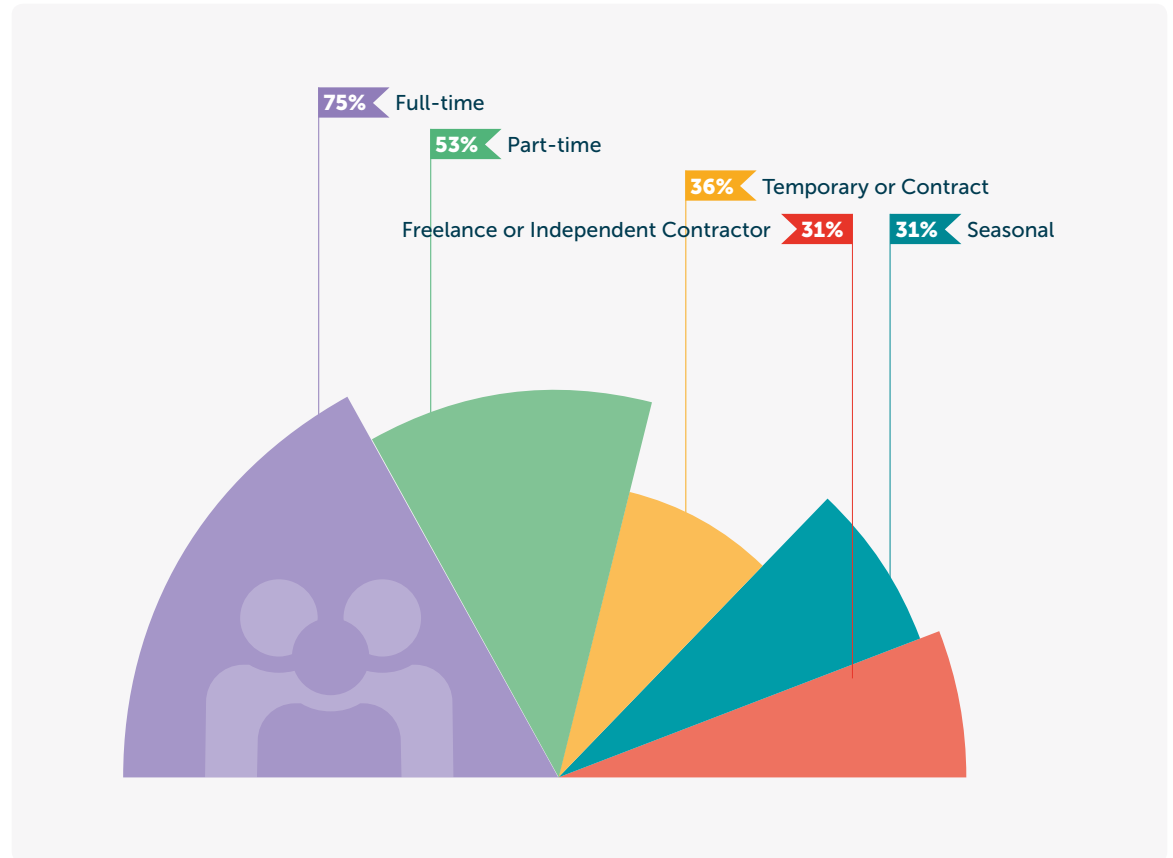
ENABLING
PROSPERITY

INCREASE INCLUSIVENESS AND DIVERSITY

People are looking for different types of jobs and individualized working conditions, reflecting the end of the one-size-fits-all approach.

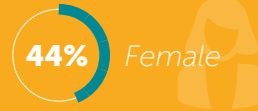
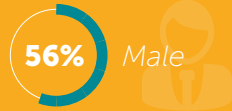
The employment industry provides a full range of arrangements to meet this diversity of expectations.

Type of work sought (US)

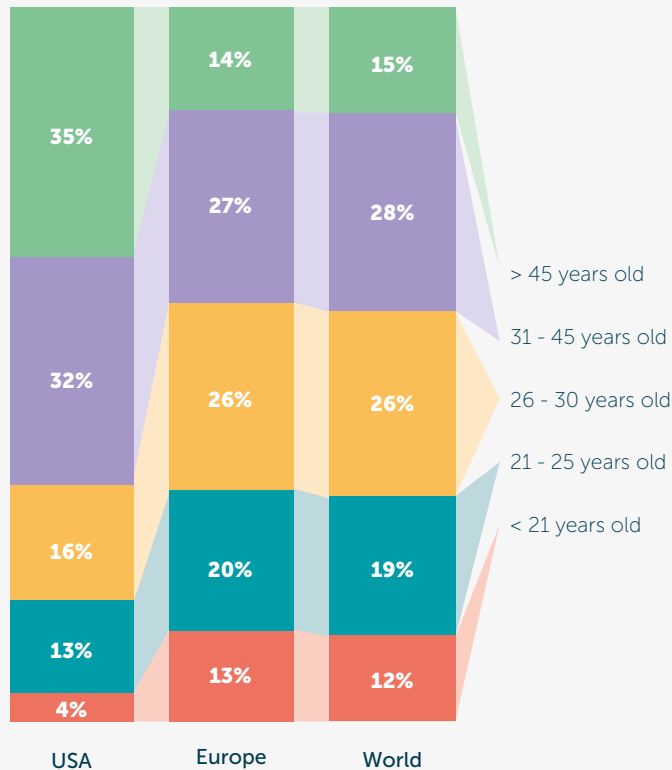


Source: American Staffing Association Workforce Monitor™, an online survey conducted Dec. 22-28, 2015, among 1,008 U.S. adult job seekers, by Harris Poll

Average gender split



Age of agency workers



INCREASE INCLUSIVENESS AND DIVERSITY

The employment industry offers work solutions to a range of people and increases inclusiveness, especially for young people and women.

At global level, 44% of agency workers are women and 31% are under the age of 25.



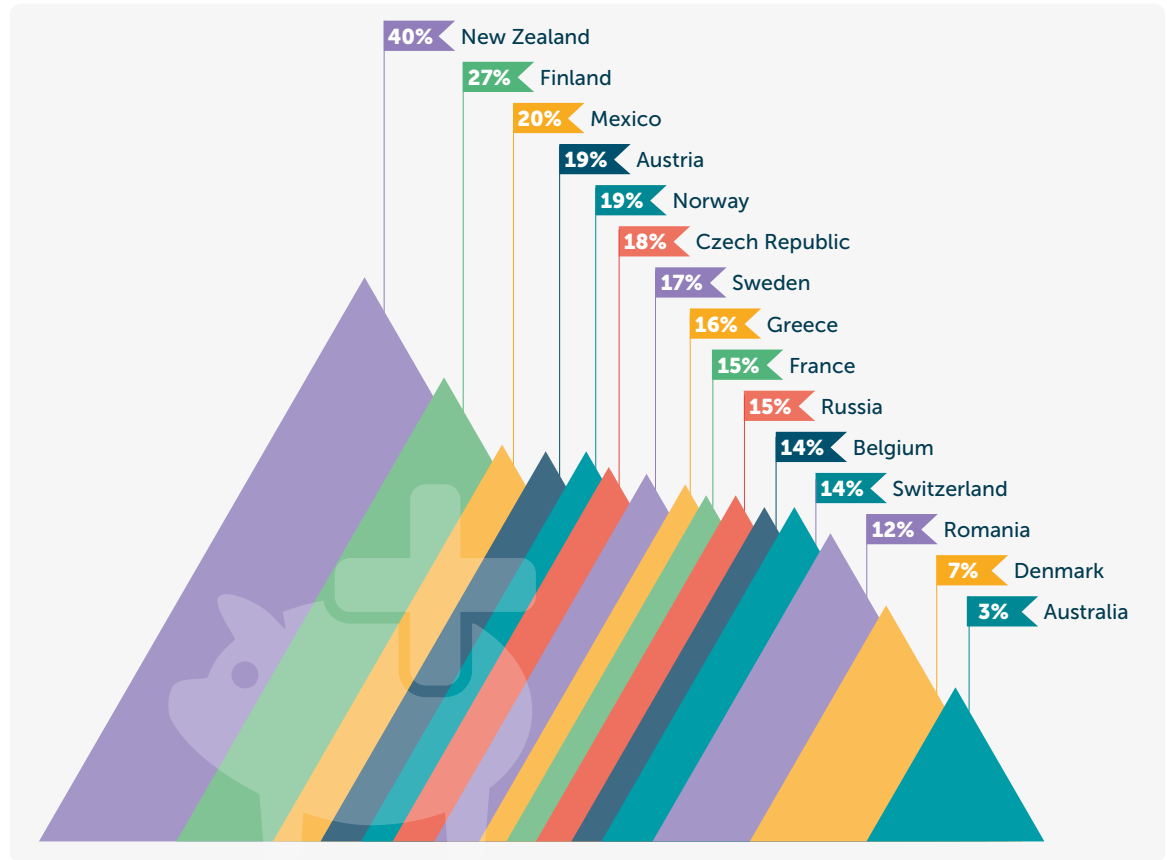


Global percentage of agency workers as students

INCREASE WORK INCOMES

Many students use agency work to fund their studies

% of agency workers as students

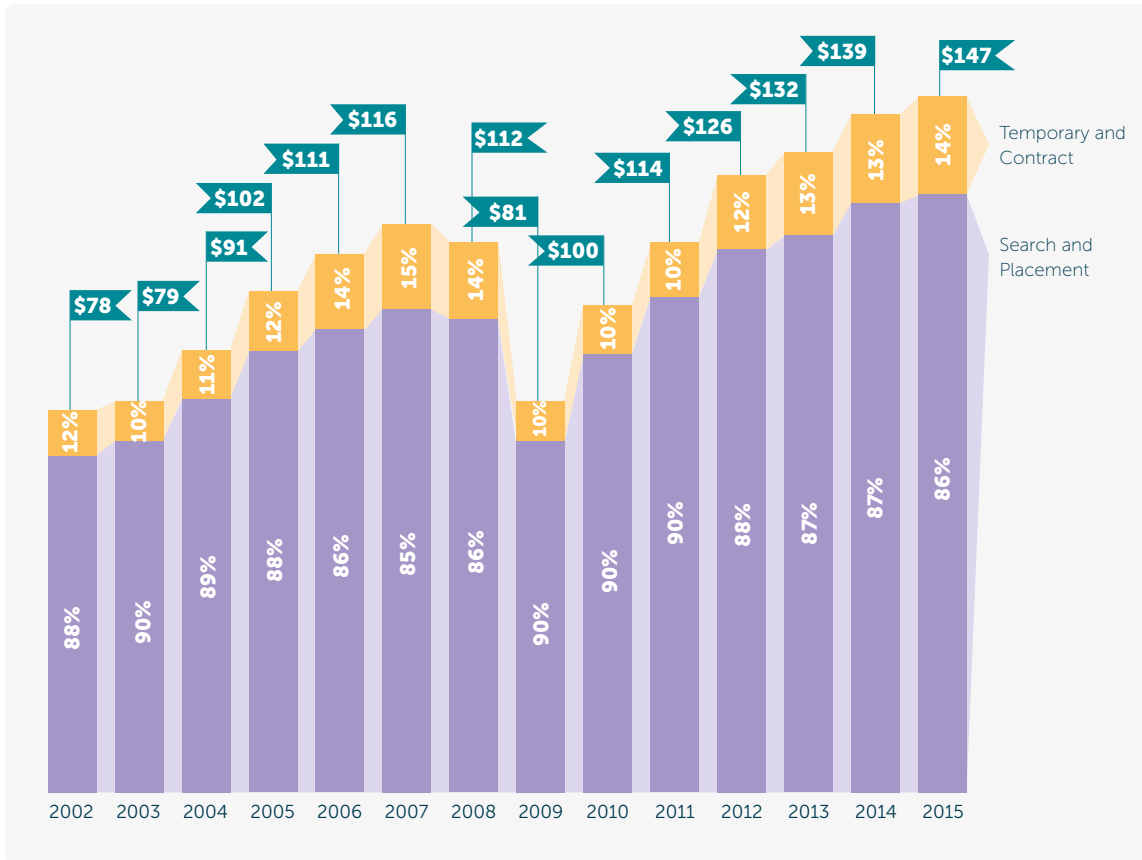




\$147 billion

sales revenues of the employment industry (2015)

Sales (Billions of U.S. Dollars) - Annual Totals for Staffing and Recruiting Industry



Source: American Staffing, Staffing Industry Analysts Inc., U.S. Department of Commerce

ENRICH GDP BY SALES REVENUES

In the USA, sales revenues of the employment industry has never been so high, reaching \$147 billion in 2015, contributing to reducing unemployment and creating work opportunities that would not exist otherwise



ENABLING PROSPERITY

ENRICH GDP BY TAXES AND SOCIAL CHARGES

By employing millions of workers, the employment industry contributes significantly to public budgets by paying social charges and corporate taxes. By reducing levels of unemployment, the industry contributes to reduce public spendings on unemployment allowances

Contributions of the employment industry to the public budget (France & the UK)



Annexes

GLOSSARY OF USED TERMS AND ACRONYMS

Agency work

Agency Work is a triangular employment relationship, defined in ILO Convention 181 as: "Services consisting of employing workers with a view to making them available to a third party, who may be a natural or legal person ("user enterprise") which assigns their tasks and supervises the execution of these tasks". It can be named as Dispatched Labour in Asia, Labor Hire in Africa or Temporary Staffing in the USA.

Career management

Main service segments are individual outplacement services, executive outplacement services, group outplacement services and other employment transition services. In these segments, outplacement services companies provide a range of employment and career services. These include resume writing, interview skills, job search strategies, coaching and career guidance. Employers generally pay all of the costs associated with these services.

Daily average number of agency workers (FTE)

Total number of hours worked by all agency workers in a country over a period of one year divided by the average number of hours worked over a period of one year by a worker with a full-time job with an open-ended contract.

Direct Recruitment

Services for matching offers of and applications for employment, without the private employment agency becoming a party to the employment relationships which may arise therefrom (Source: ILO Convention 181), including executive search & selection.

Managed Services Provision (MSP)

MSP is a service whereby a company takes on primary responsibility for managing an organization's contingent workforce program. Typical responsibilities of an MSP include overall program management, reporting and tracking, supplier selection and management, order distribution and often consolidated billing. The vast majority of MSPs also provide their clients with a vendor management system (VMS) and may have a physical presence on the client's site. An MSP may or may not be independent of a staffing supplier.

Penetration rate

Daily average number of agency workers [in full-time equivalents] divided by the working population [as defined by the ILO as follows: "The employed comprise all persons of working age who during a specified brief period, such as one week or one day, were in the following

categories: a) paid employment (whether at work or with a job but not at work); or b) self-employment (whether at work or with an enterprise but not at work)."

Private employment services / Employment industry

Agency work is usually one of several other HR services provided by recruitment and employment agencies, along with direct recruitment, career management, RPO & MSP. The broad range of these services are called private employment services. The employment agency provides a professional service to a user company by taking over (a part of) the recruitment and HR process. In this sense, private employment services are comparable to other professional and business services such as auditing & accounting, communications & marketing, facilities management etc.

Recruitment Process Outsourcing (RPO)

A service by a third-party specialist provider, to assume the role of the client's recruiting department by owning and managing part or all of its recruitment process and related recruitment supply chain partner relationships, provide the necessary skills, activities, tools, technologies, and process methodologies.

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Lithuania (LT)
Luxembourg (LU)
Netherlands (NL)
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