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Adapting to a Changing World of Work: What Role and Influence for the Staffing Industry?

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Tuesday, Oct. 25
11 a.m.–12:15 p.m.



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Adapting to a Changing World of Work

*What Role and Influence
for the Staffing Industry?*



**WORLD
EMPLOYMENT
CONFEDERATION**
The Voice of Labour Market Enablers

Annemarie Muntz
Denis Pennel



ASA Staffing Conference
29th October 2016

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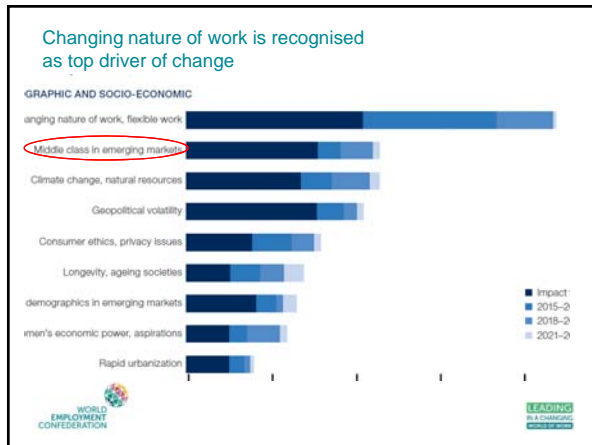
Leading in a Changing World of Work

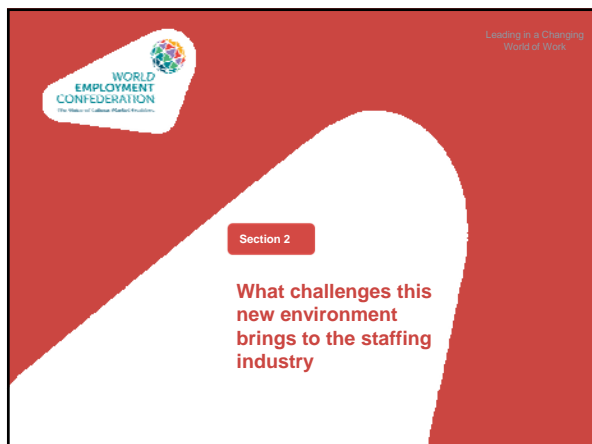
Content

1. The trends shaping a new world of work
2. What challenges this new environment brings to the staffing industry
3. The staffing industry as labour market enablers
4. Shaping the changing world of work







What challenges this new environment brings to the industry

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Why are labour markets becoming more complex?

This complexity is fully recognised by companies

74% of executives say environment is (very) complex

Figure 9. Current state of complexity of the work environment and business practices

Complexity Level	Percentage
Very complex	25%
Complex	49%
Somewhat complex	22%
Simple	4%
Not on our radar	1%

Graphic: Deloitte University Press | DUPress.com

Reimagining

Simplification of work: The coming revolution
Organizations are simplifying work environments and practices in response to information overload and increasing organization and system complexity.

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Will robots steal our jobs?

Overall impact is controversial but...

Routine work is being replaced by machines



automation

Fastidious work is being sub-contracted



outsourcing

Creative work remains in-shore and of great added value




craft work


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Technology will actually create many jobs

A job multiplier of high-tech STEM jobs

In the high tech hubs creating one high-tech STEM job...





...creates 2.5 to 4.4 local other jobs (mostly non-routine low- and medium-skilled service jobs).

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Towards a polarisation of labour markets

The disappearing middle

Share of total hours worked, change between 1993 and 2006, in percentage points

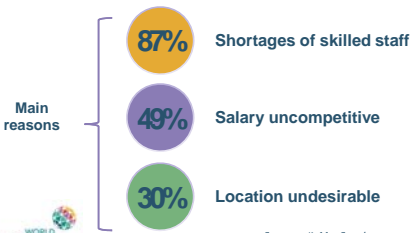
Country	Lowest-income occupations	Middle-income occupations	Highest-income occupations
Netherlands	~10	~-5	~15
United States	~10	~-5	~15
Britain	~10	~-5	~15
Germany	~10	~-5	~15
Spain	~10	~-5	~15
EU average	~10	~-5	~15
France	~10	~-5	~15
Italy	~10	~-5	~15

Source: "Job Polarization in Europe" by Maarten Goos, Koen Manning & Anna Salomons, American Economic Review, 2009

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Talent gap: While unemployment is high, recruitment does not come that easily...

At World level **61%** of companies experience difficulty recruiting staff

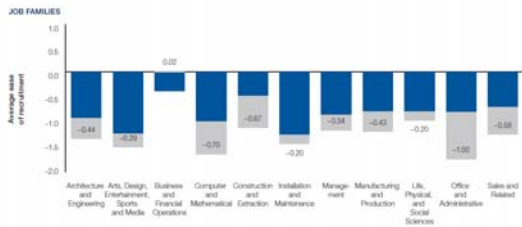


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Source: Kelly Services

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Talent gap: While unemployment is high, recruitment does not come that easily...
Expected change in ease of recruitment, 2015-2020 (job families)

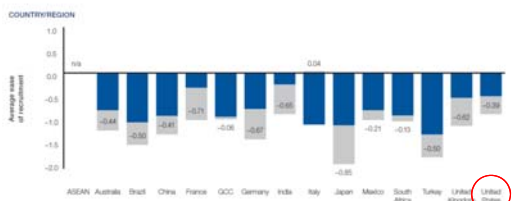


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Source: WEF report on Future of Jobs, 2016

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Talent gap: While unemployment is high, recruitment does not come that easily...
Expected change in ease of recruitment, 2015-2020 (regions)



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Source: WEF report on Future of Jobs, 2016

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What skills will make a worker a talent in 2020?

Top 10 soft skills expected

Five years from now, over one-third of skills (35%) that are considered important in today's workforce will have changed

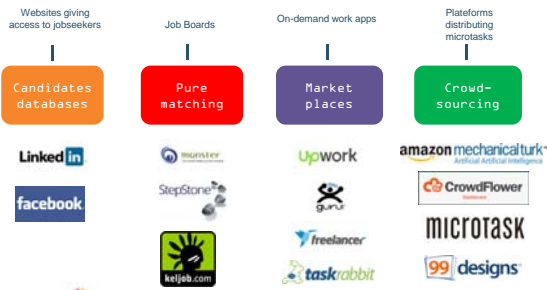
Creativity will become one of the top three skills workers will need

With the avalanche of new products, new technologies and new ways of working, workers are going to have to become more creative in order to benefit from these changes



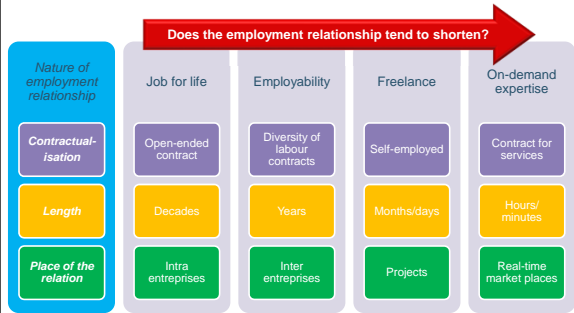
The rise of new models of work distribution

Competition, additions, or an entirely new beast?



Towards more on-demand work

Back to the future?



Based on Thomas Malone - The Spectrum of Jobs - 2003





The changing world of work

What role for the staffing industry?

1 ENABLES WORK

Each year we help **1.2 million jobs** in the labour market. **167.2 million of jobs in 2015**. Agency work alone accounts for **1.4%** of the labour market.

2 ENABLES ADAPTATION

The world of work is changing, and our people must change. **75% OF COMPANIES** each year hire new staff. **75% OF COMPANIES** have hired at least one new employee in the last 12 months. **75% OF COMPANIES** have hired at least one new employee in the last 12 months.

3 ENABLES SECURITY

On average, before entering our agency work 30% were unemployed, while afterwards 10% were unemployed.

Similarly, 45% of people starting agency work had employment before, while 77% remain in employment.

4 ENABLES PROSPERITY

Compared to people who were unemployed, **75% HIGHER EARNINGS**. **75%** of top of their, our industry helped to **£100 billion** for its clients each year and we employ **1.2 million people** with our agencies. These agencies coordinate social changes, and help bring people to employment, being governments the cost of unemployment benefits.

The staffing industry acts as a labour market enabler

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HR services represented by members of the World Employment Confederation

Members of the World Employment Confederation represent a large range of HR services, agency work being the core one for all of them

HR Service	Percentage
Agency Work	100%
Recruitment	~85%
Training	~75%
HR Consulting	~70%
Payroll	~65%
Employee Relations	~60%
Performance Management	~55%
Health and Safety	~50%
Self-employment	~45%
Other HR services	~40%
Personnel Administration	~35%
Welfare to work	~30%
Other HR services	~25%
Other HR services	~20%
Other HR services	~15%
Other HR services	~10%
Other HR services	~5%

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American Staffing Association
Staffing World® 2016

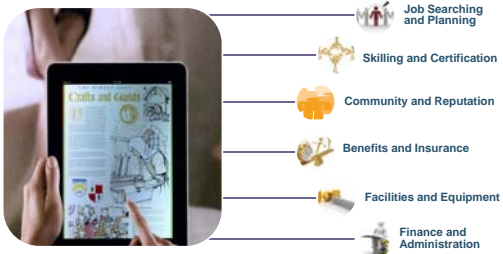
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The staffing industry is well-placed to enable adaptation to the changing world of work

- Allows companies to focus on core business
- Adapts workforce to production needs
- Develops innovative and integrated HR solutions
- Increases work mobility
- Acts as a career agent
- Increases transparency of labour market
- Provides talent management based on HR analytics
- Provides flexible and attractive work alternatives



Will the industry become a guild-like intermediary?
Providing workers with back-office and career services?



New types of intermediaries are already operating!

Job Searching and Planning

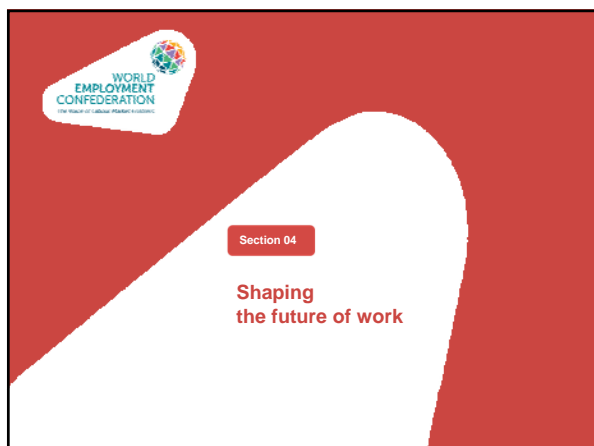
Community and Reputation

Skilling and Certification

Benefits and Insurance

Facilities and Equipment

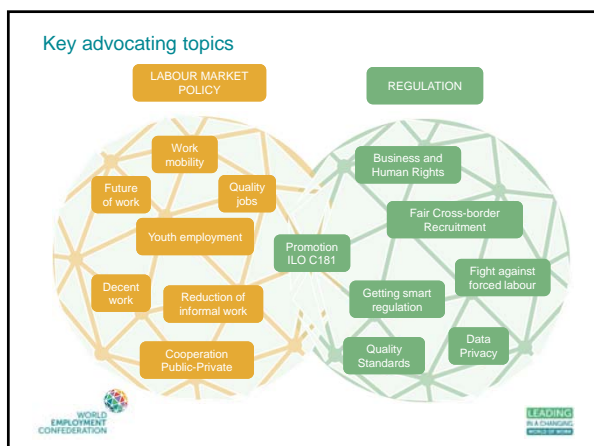
Finance and Administration



Shaping the changing world of work

Key drivers used by the World Employment Confederation

- Advocating (promoting interests)**
 - Lobbying
 - Profiling the industry
 - Dialogue with social partners
- Market Development**
 - Membership expansion
 - Capacity building
 - Sharing practices
 - Quality standards
- Thought leadership**
 - Research and data collection
 - Educating on the changing world of work
 - Conferencing
 - Networking with opinion leaders



The World Employment Confederation

Why a name change?



To reflect our industry's extended territory (the world of employment) and its leadership in an environment that is quickly evolving

- While Ciett was established in 1967 to represent temporary agency work, the World Employment Confederation will be the trade body representing the employment industry at global level



To have a new name and brand which better capture the changes taking place in the world of work and the enhanced role played by our industry in achieving better functioning labour markets



To achieve a stronger footprint in terms of advocating and influencing, aligning the global and national levels



The World Employment Confederation

Key facts and figures



The only authoritative voice for the employment industry since 1967 with members from 50 countries



Regrouping 260,000 employment agencies with 1.66 million internal staff, including eight of the largest worldwide businesses as direct corporate members



Represents the full spectrum of HR services, including agency work, recruitment, career management, RPO and MSP



Working closely with international stakeholders including ILO, OECD, IOM, World Bank, IOE, EU institutions



Offering access to the labour market for 80 million workers, 40 million of these through agency work



The World Employment Confederation

Our unique selling proposition



Shaping smart regulation for the staffing industry



Influencing key global stakeholders



Enabling business development (opening up new markets)



Accessing market data and research tools



Sharing practices and networking

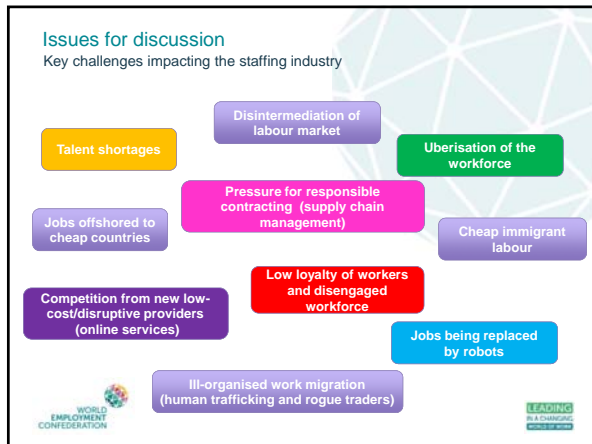


Building recognition and visibility for the industry



Thought leadership on changing world of work





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The Voice of Labour Market Solutions

Stay in touch!

- www.wecglobal.org
- [@WECglobal](https://twitter.com/WECglobal)
- [World Employment Confederation](https://www.linkedin.com/company/world-employment-confederation)
- [New Reality of Work](http://www.itf.gov.uk)

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Thank You for Attending

Annemarie Muntz
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Managing Director
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STAFFING WORLD
