ciett

International Confederation of
Private Employment Services

Economic Report

2015 Edition

(Based on data of 2013/2014)

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INTRODUCTION

Dear reader,

2014 has been a year of transitions for the employment and recruitment industry and its global trade organisation, CIETT. The 2015 edition of the Economic Report, which we are proud to present to you, is a living proof of these changes.

The employment and recruitment industry is now starting to recover after the 2008 economic downturn that hit many of our members. 2013 was a year of growth, which can be seen on country level as well as on the aggregate global level. Penetration rates, total number of workers and sales revenue all increased in 2013 compared to 2012. Data from 2014, which is only available for selected markets, shows further improvement. Still, many markets haven't reached their pre-crisis levels.

Another change in 2014 was that Ciett members elected a new board and President, with new strategic priorities. One of those priorities was to broaden the scope of services that Ciett represents. After all, a large number of Ciett members are already offering a range of services including agency work or staffing, but also search and selection, outplacement, training or Recruitment Process Outsourcing (RPO). In this economic report, for the first time we also include data on these other HR services to give a more complete picture of the employment and recruitment industry. This allows us to say that in 2013, around the world a total number of 60.9 million people gained access to the labour market through a private employment agency (with 40.2 million working as an agency worker). This is something we can and should be proud of.

Not all of these other types of private employment services are as well organised as agency work. A very important element therefore is the issue of definitions. To avoid confusion when speaking about these new and sometimes not very well known ways of doing business, we upgraded the glossary that forms part of this report. The fact that some of these services are relatively new also has an impact on the availability of data and its solidity. Unfortunately, our overview of HR services other than agency work is today patchy and incomplete. Ciett members and the Ciett secretariat are committed to improve data gathering in these fields in the coming years.

We invite you to browse through this publication and get a better insight into our industry. If you have any questions about the data or about its implications on labour markets in your country, please do not hesitate to contact the Ciett secretariat (info@ciett.org), who will be happy to help.

Sincerely,

Annemarie Muntz, Ciett President
Denis Pennel, Ciett Managing Director

EMPLOYMENT & RECRUITMENT INDUSTRY IN 2013

PENETRATION RATES AGENCY WORK:

USA	JAPAN	EUROPE	WORLD
2.1%	2.0%	1.7%	1.6%

A total number of
60.9 MILLION WORKERS
gained access to the labour market through the employment & recruitment industry worldwide

40.2 IN AGENCY WORK,
9.6% GROWTH COMPARED TO 2012

12 MILLION
FTE WORKING IN AGENCY WORK (5,2% GROWTH)

260,000 *Agencies*

1.66 million *Internal Staff* (ALL EMPLOYMENT SERVICES)

GLOBAL ANNUAL SALES REVENUE:

AGENCY WORK:
€ 282 bn
(68%)

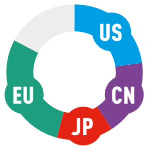
Entire employment & recruitment industry:
€ 415 bn

€ 26 billion
Search & selection

€ 25 billion
RPO

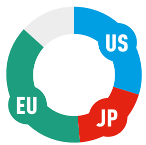
€ 81 billion
Other

MARKET SHARE:



US 22.9% CN 18.0% JP 13.4% EUR 28.5%

MARKET SHARE BY SALES REVENUE (ALL EMPLOYMENT SERVICES)



US 29.9% JP 18.8% EUR 38.2%

MARKET SHARE BY SALES REVENUE (AGENCY WORK)

For more information, see chapter 1

1

THE EMPLOYMENT & RECRUITMENT *industry worldwide*

This chapter outlines the **MAJOR DEVELOPMENTS OF THE EMPLOYMENT AND RECRUITMENT** *industry in 2013 and for some indicators in 2014.*
For the first time, it includes data not only on agency work, but also on other HR services such as search and selection, recruitment process outsourcing and outplacement.

60.9

60.9 MILLION PEOPLE
GAINED ACCESS TO WORK THROUGH THE EMPLOYMENT & RECRUITMENT INDUSTRY IN 2013

40.2	17.7	1.9	1.2
AGENCY WORK	SEARCH & SELECTION	RPO	OUTPLACEMENT

1 THE EMPLOYMENT & RECRUITMENT INDUSTRY WORLDWIDE

a) The industry as a whole

Agency work:
40.2 MILLION
worldwide

Over 60,9 million people gained access to work in 2013

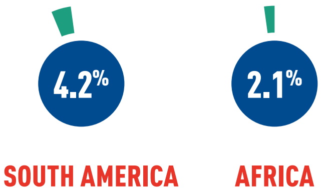
In 2013, 60.9 million people gained access to the labour market in one way or another through the employment & recruitment industry. In agency work an increase can be seen compared to last year: from a bit more than 36 million people in 2012 to slightly over 40 million people in 2013 who worked as an agency worker at some point during the year. This means an increase of about 9,6%. In Europe, the total number of individuals went from 7.9 million to 8.7 million people.

The biggest market for agency work is still the USA with 11 million people. China is close behind with 10.8 million people, although the nature of agency work in China is not fully comparable to that in other countries. Based on 2012 data, Japan is the third biggest market with 2.4 million individuals.

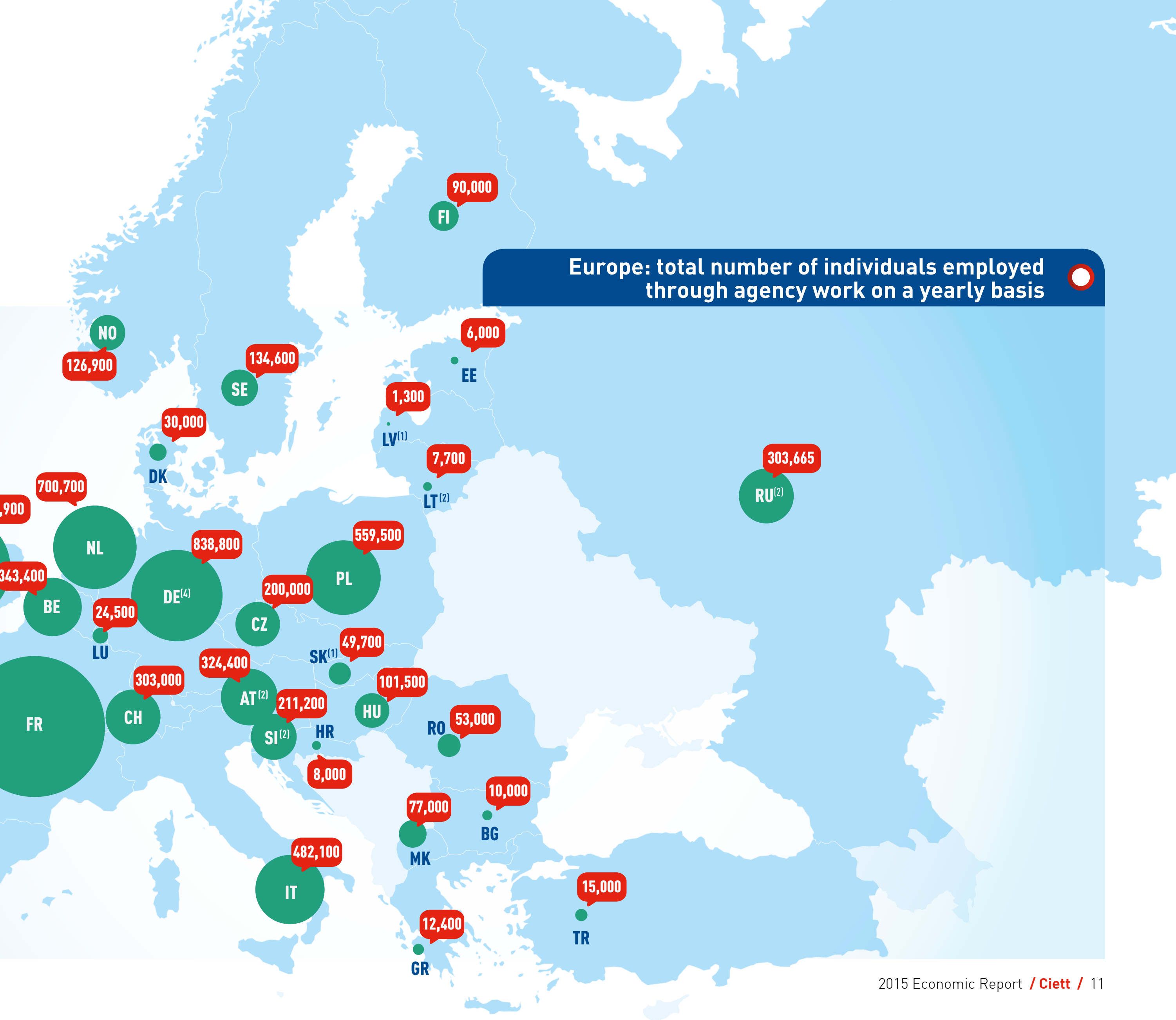
Total number of individuals employed through agency work on a yearly basis

Source: Ciett national federations.

(1) 2012 data for agency work
(2) 2011 data for agency work
(3) 2011 estimate for agency work
(4) UK: number is "on any given day"



Europe: total number of individuals employed through agency work on a yearly basis



1 THE EMPLOYMENT & RECRUITMENT INDUSTRY WORLDWIDE

a) The industry as a whole

Agency work: **40.2 MILLION** *worldwide*

Search & selection: **17.7 MILLION**

RPO: **1.9 MILLION**

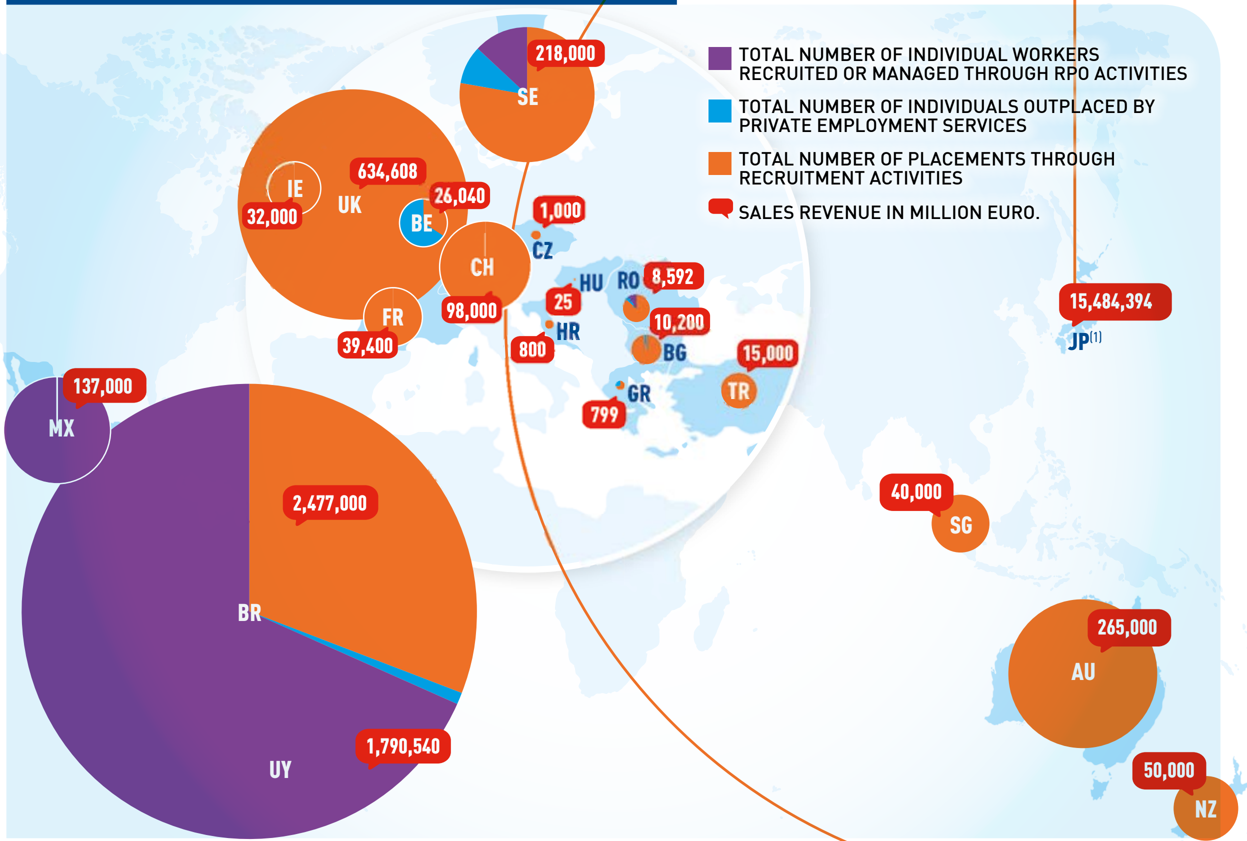
Outplacement: **1.2 MILLION**

Employment and recruitment industry offers a range of services

This year for the first time we collected data about other types of HR services than agency work, such as search and selection, outplacement and RPO. 18 countries reported on the number of individuals recruited in search and selection activities, leading to a total of 17.6 million people. In a total of 7 countries, the employment & recruitment industry outplaced 1.2 million people, and finally in a total of 4 countries, a total of 1.9 million people were managed or recruited under RPO activities. Countries not mentioned may still have one or more of these services being offered on their markets, but have no data available on the size of those activities.

(1) Japan: the figure for search and selection includes daily workers. If limited to assignment more than 4 months, it is 449,765. (2012)

Total number of individuals employed through other HR services on a yearly basis



Source: Ciett national federations.

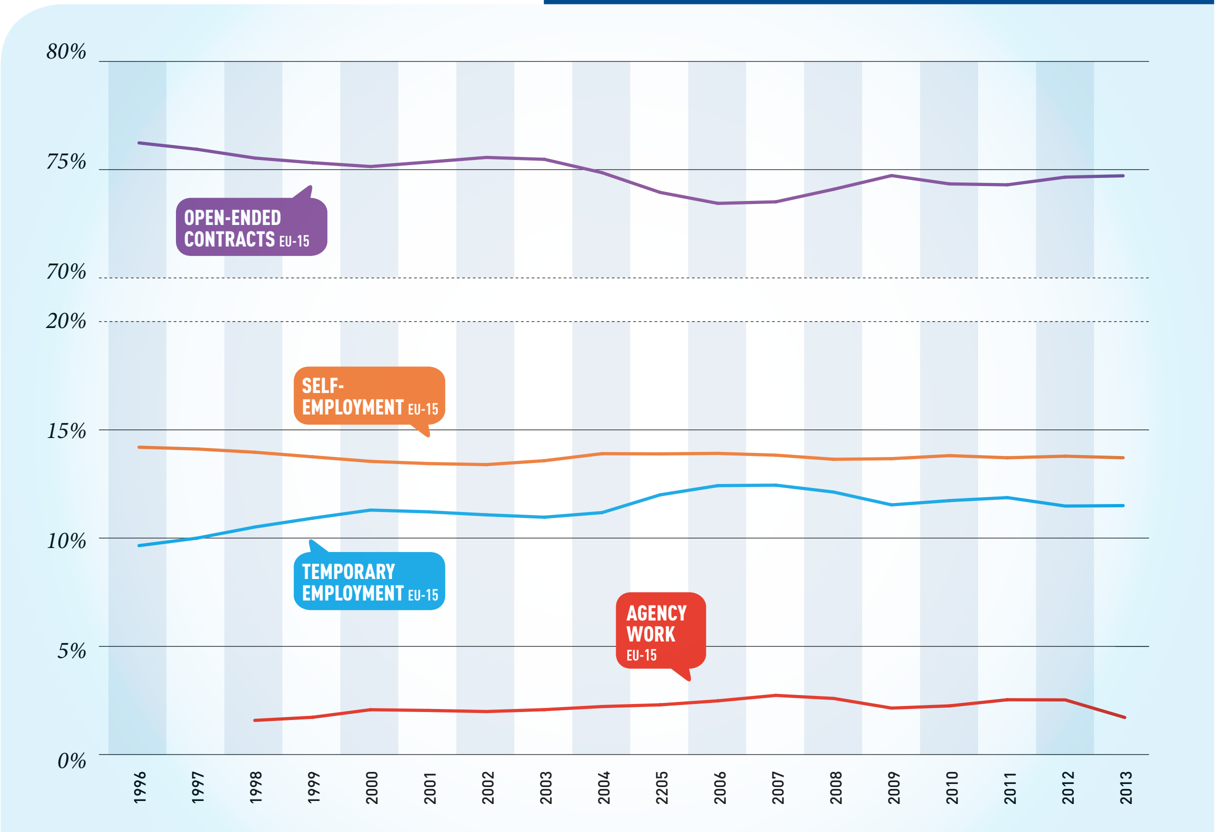
75% OPEN-ENDED

14% SELF EMPLOYMENT

11% TEMPORARY EMPLOYMENT

1.7% AGENCY WORK

Size of evolution of agency work compared to other forms of employment



Source: IDEA Consult based on Eurostat (LFS Data) and Ciett data.

Europe: Market share of various types of employment mostly stable

This graph shows that in the EU, the share of various types of employment such as agency work, freelancing or open-ended contracts has been more or less stable for the past two decades, and is only changing very slowly. So while companies and workers are demanding more flexibility, it would be wrong to speak of a surge in flexible forms of labour at the cost of open-ended employment, which still forms about 75% of all employment.

Note: Some categories overlap (some agency workers might be also included in the category "temporary employment" or "open-ended contracts", as defined by Eurostat). The total is therefore above 100%.

a) The industry as a whole

259,529 *agencies*

236,283 *branches*

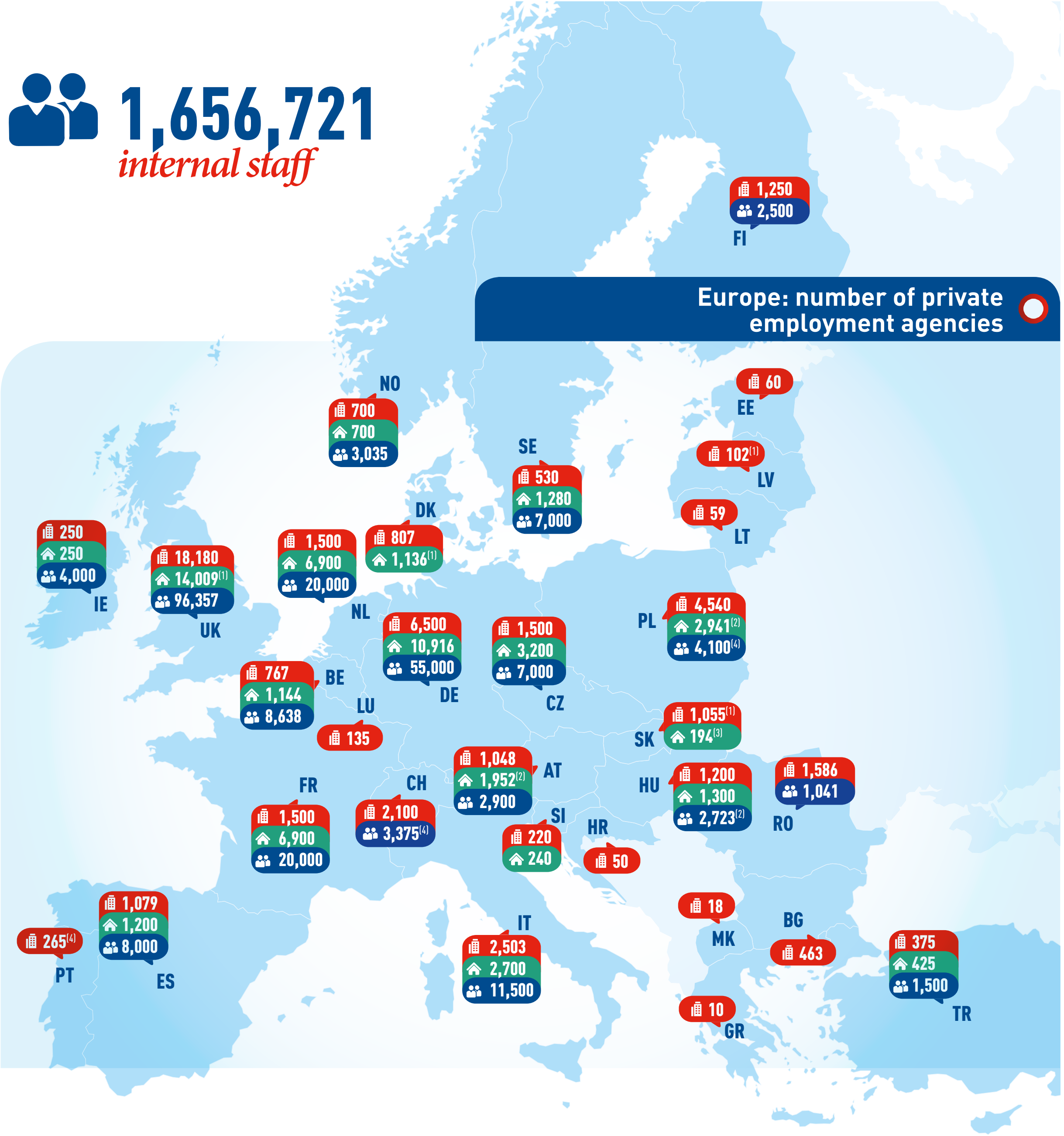
Private employment services operate a close-knit network around the world

In 2013, there were almost 260,000 private employment agencies around the world, offering a full range of HR services: agency work, search & selection, RPO, outplacement and more. About 62.5000 of them were engaged in agency work. In total there are about 236,000 local branches of employment and recruitment agencies. This illustrates how, especially in other services than agency work, a number of agencies operate in-house or online, without having separate branches. In these agencies and branches about 1,66 million internal staff were available to find *a job for every person, and a person for every job.*

World: number of private employment agencies

Source: Ciett national federations 2013. (1) Ciett national federations 2012. (2) Ciett national federations 2011. (3) Ciett national federations 2010. (4) Ciett national federations 2009 Agencies: based on figures from 46 countries. Branches: based on figures from 39 countries. Staff: based on figures from 43 countries.

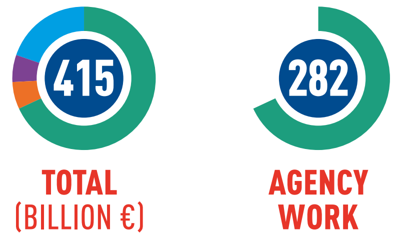
1,656,721
internal staff



These people work on any of the services that our industry offers, be it agency work, search and selection, training or other. This means that private employment services have a very widespread network of labour market specialists covering many corners of the world. Local branches ensure a deep knowledge of the local labour market, while there are many regional, national and international networks that help workers gain a broader job perspective.

a) The industry as a whole

GLOBAL ANNUAL *sales revenue:*

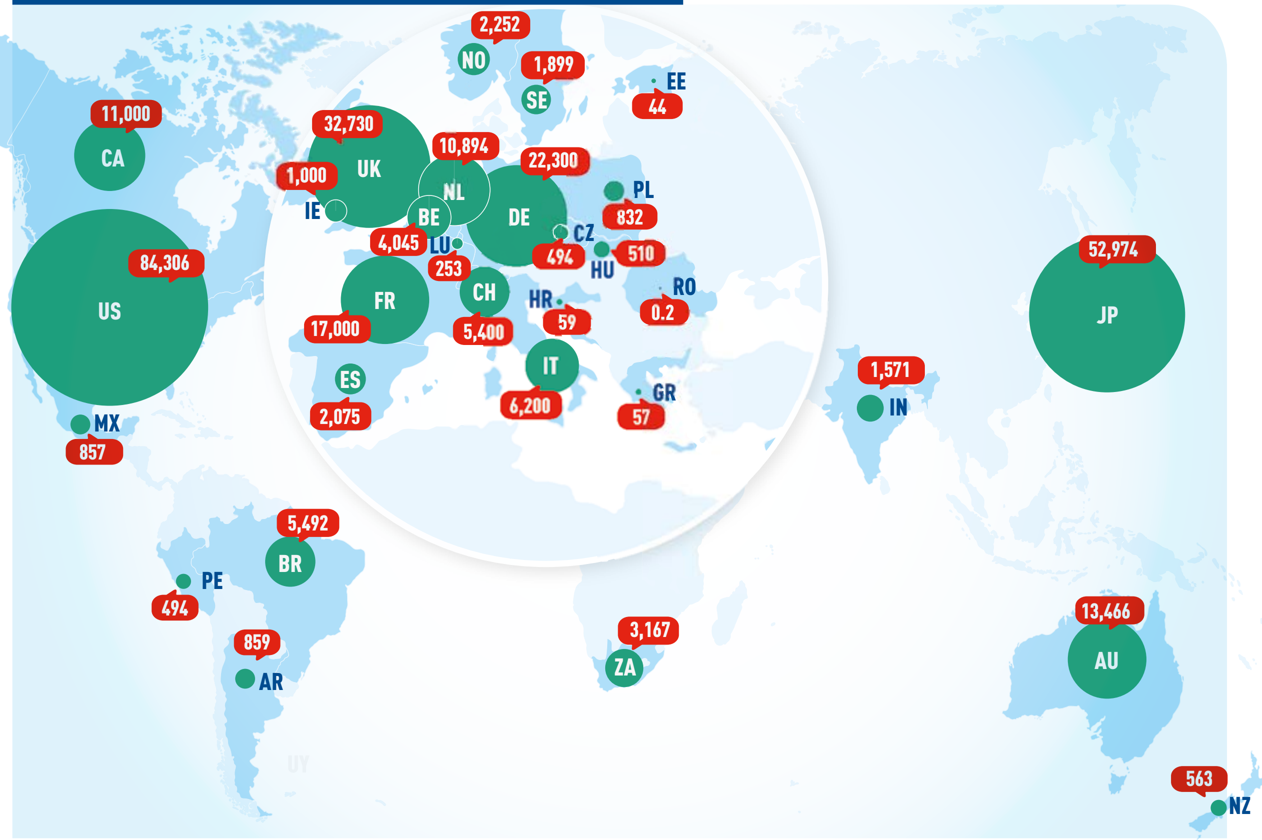


Turnover mostly stable in 2013

In total, global annual sales revenue for the entire employment & recruitment industry is € 415 bn. For agency work this is € 282 bn, which is a slight decline compared to 2012. This is partly due to methodological reasons: in previous years, some revenue of other HR services was mistakenly counted as part of agency work turnover. Overall, most countries did experience a slight decline or stable turnover for agency work in 2013.

For other HR services combined turnover stands at approximately € 132 bn, with the largest part coming from search and selection. This is however an incomplete picture, as data collection about these other services is still patchy. Countries not included in this chart could still have a market of HR services, but may not be able to provide any data about the size of these markets.

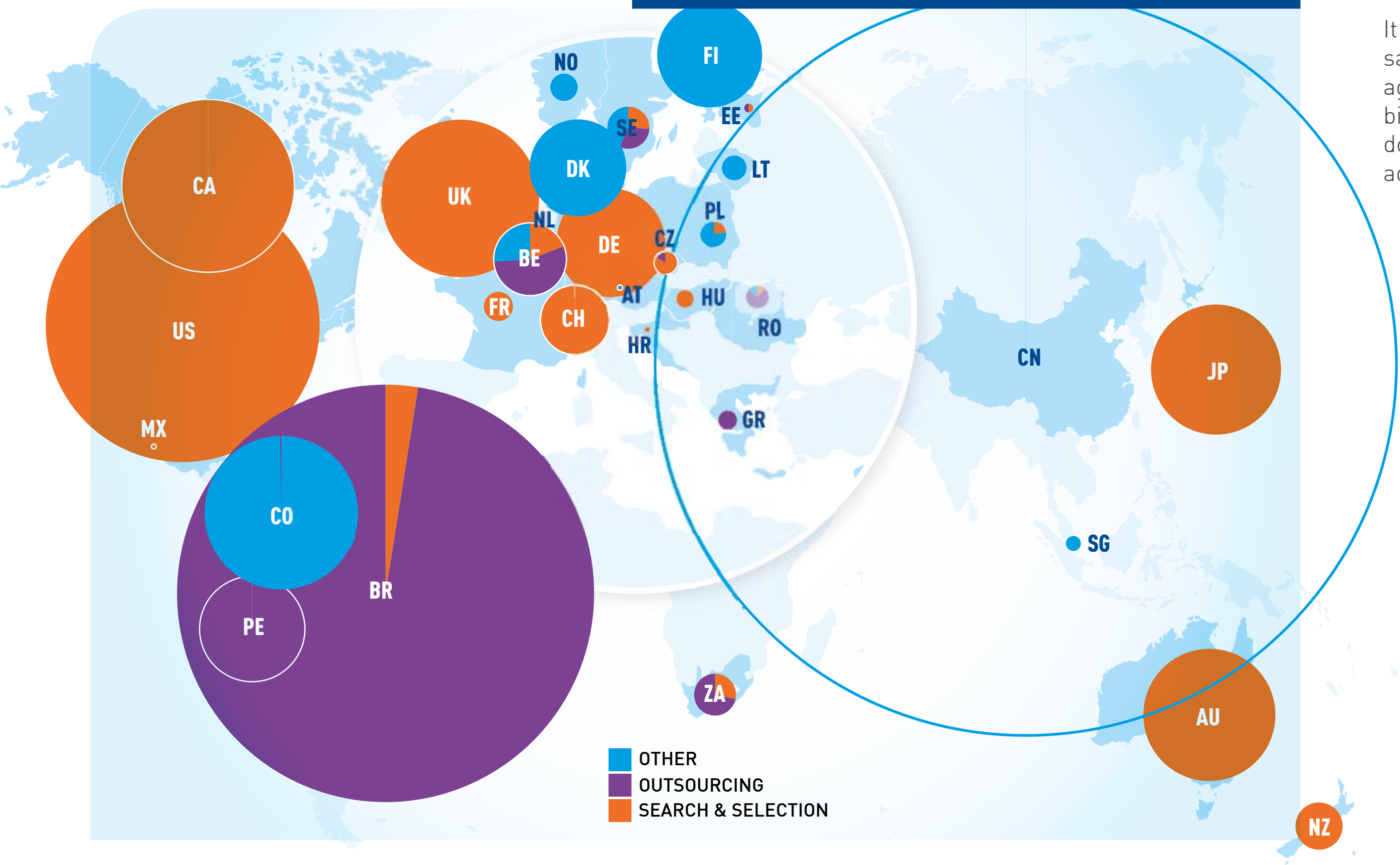
Global annual sales revenue in 2013: agency work



Source: Ciett national federations.

SEARCH & SELECTION | RPO | OTHER

Global annual sales revenue in 2013: HR services



It is important to note that workers salaries are included in the turnover of agency work, making its volume much bigger than that of other services. That does not necessarily reflect the value added through this service.

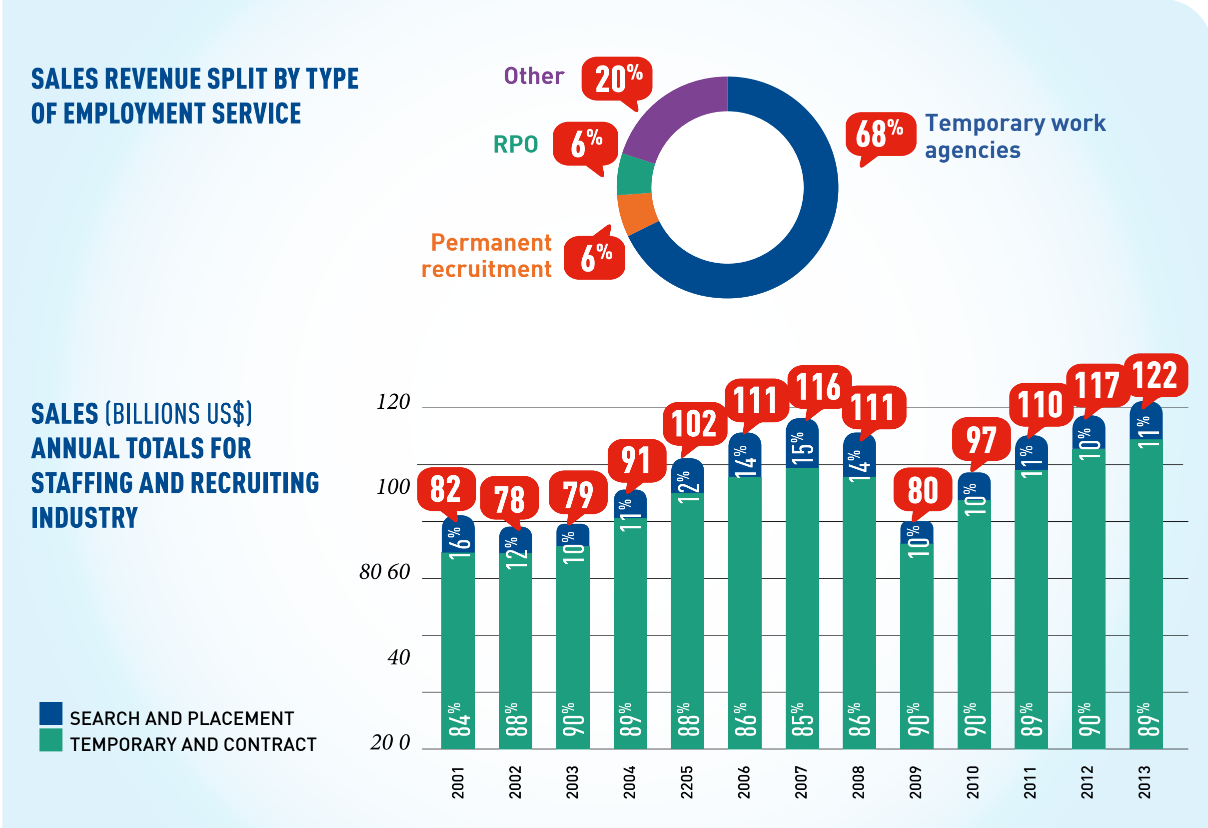
Note: The "other" category includes for example training, but the biggest part of this category is taken up by Chinese turnover. Exact distribution of this turnover accross different HR services and agency work is unknown.

a) The industry as a whole

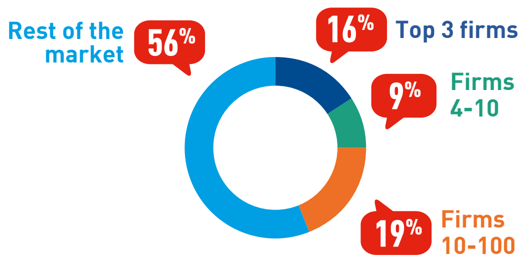
Biggest part of sales revenue comes from agency work

Agency work is delivering by far the biggest part of the sales revenue of the employment and recruitment industry. The 68% reported here is partly distorted by a the "other" category covering 20% of revenue. This category includes for example training, but the biggest part of this category is now taken up by Chinese turnover, coming mostly from "labour dispatch", which is close but slightly different to agency work. In the USA, search and placement generally make up about 10-15% of sales revenue, not counting RPO or training. It is important to note that the volume of turnover does not necessarily reflect the value added by a service, as in agency work also the workers' salaries are counted in the turnover, boosting its volume.

Global annual sales revenue



Source: American Staffing Association analysis



Top 10 firms sales revenue in 2014 – billion of €

Source: Global 100, The worlds largest staffing & talent engagement firms, Staffing Industry Analysts.

Few changes in top 10 firms

The top 10 firms took up about 25% of the total agency work market in 2014, which is slightly lower than last year when this was about 27,5%. The top 3 represented 16% of total annual sales revenue. The top 10 comprises the same companies as in 2013, only Robert Half and USG People exchanged position. In the top 10, Allegis was the only company to grow its sales revenue, others showed similar or lower results in 2014 as in 2013.

Of the top 100 companies, 42 are headquartered in Europe, 40 are US based, and the other 17 are from the rest of the world, according to Staffing Industry Analysts.

Note: Staffing Industry Analysts define "staffing" revenue as revenue generated from the provision of temporary workers to business clients, as well as from "place & search" services (direct hire/ permanent placement and retained search.) They also include revenue from "temp-to-hire" conversions.

a) The industry as a whole

OTHER HR SERVICES *turnover*

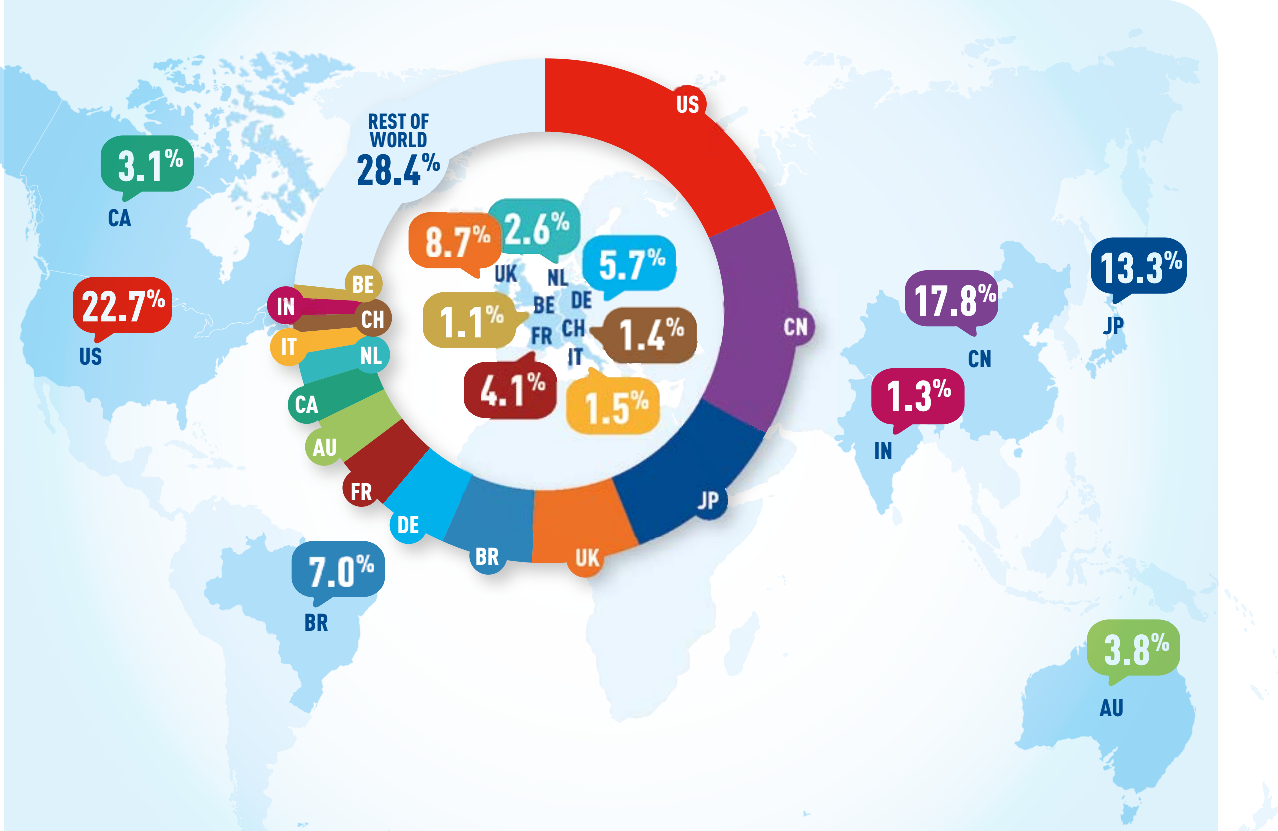
US 22.9%
CN 18.0%
EUR 28.5%

A few big markets account for large part of sales revenue

These two graphs show the percentage of global annual sales revenues by country.

For HR services, the labour dispatch market in China represents about 18% of the global market, which makes it bigger than Japan or the UK. Brazil also holds a significant share of the global market, 7%, due to its large outsourcing market. In all HR services, Europe accounts for about 28%. The top 10 countries account for almost 90% of the total market.

Percentage of global annual sales revenue (all employment services)

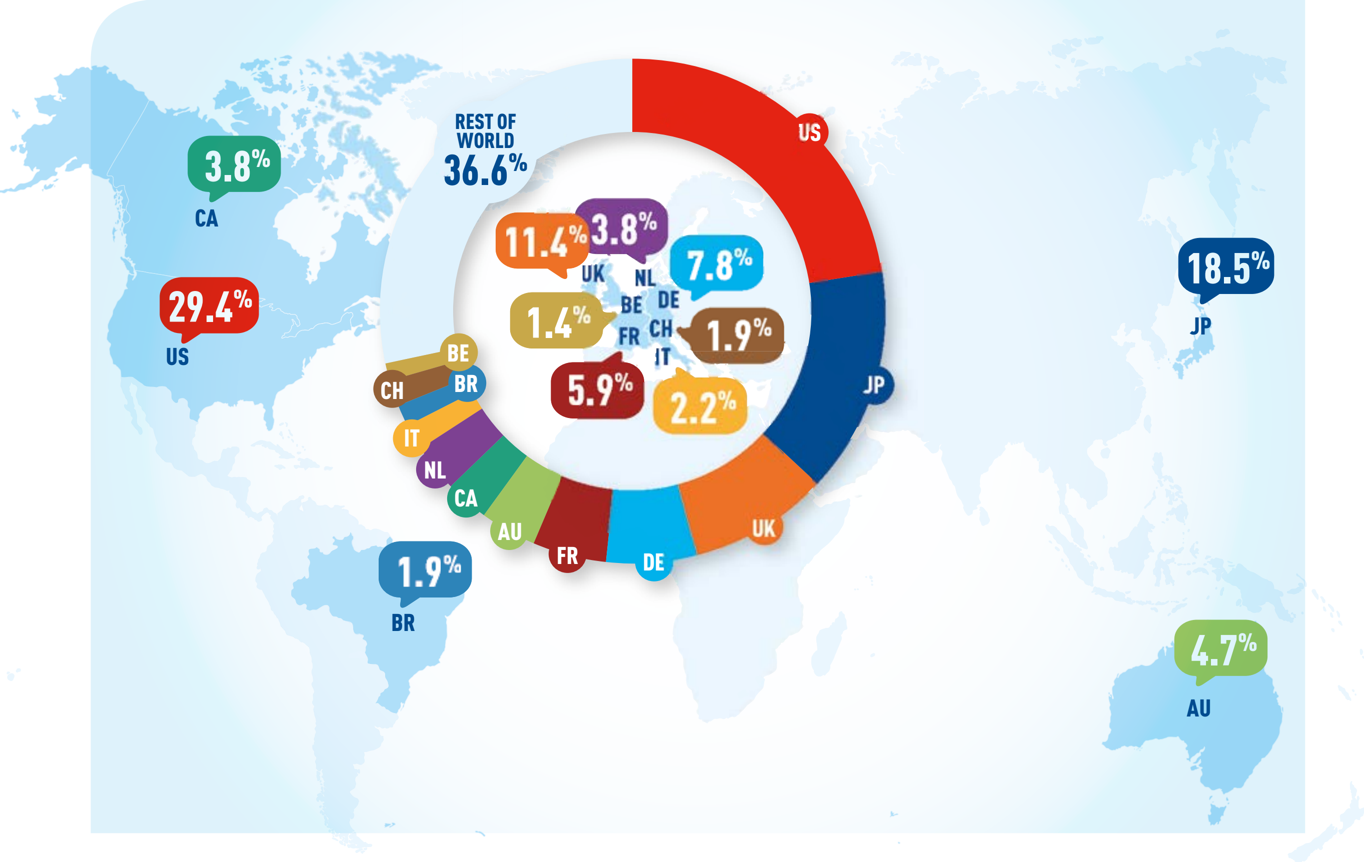


Source: Ciett national federations

AGENCY WORK *turnover*

US 30% **JP** 19% **EUR** 38%

Percentage of global annual sales revenue (Agency work)



For agency work, the share per country is comparable to last year, with minor changes. The USA, Japan and the UK still make up the top three markets, representing 60% of the global market. Their share has gone up slightly from 56% in 2012. All European countries combined represent 38% of the global market. The top 10 countries account for about 91% of the total annual sales revenue. This could mean that there are quite a lot of countries that still have growth potential.

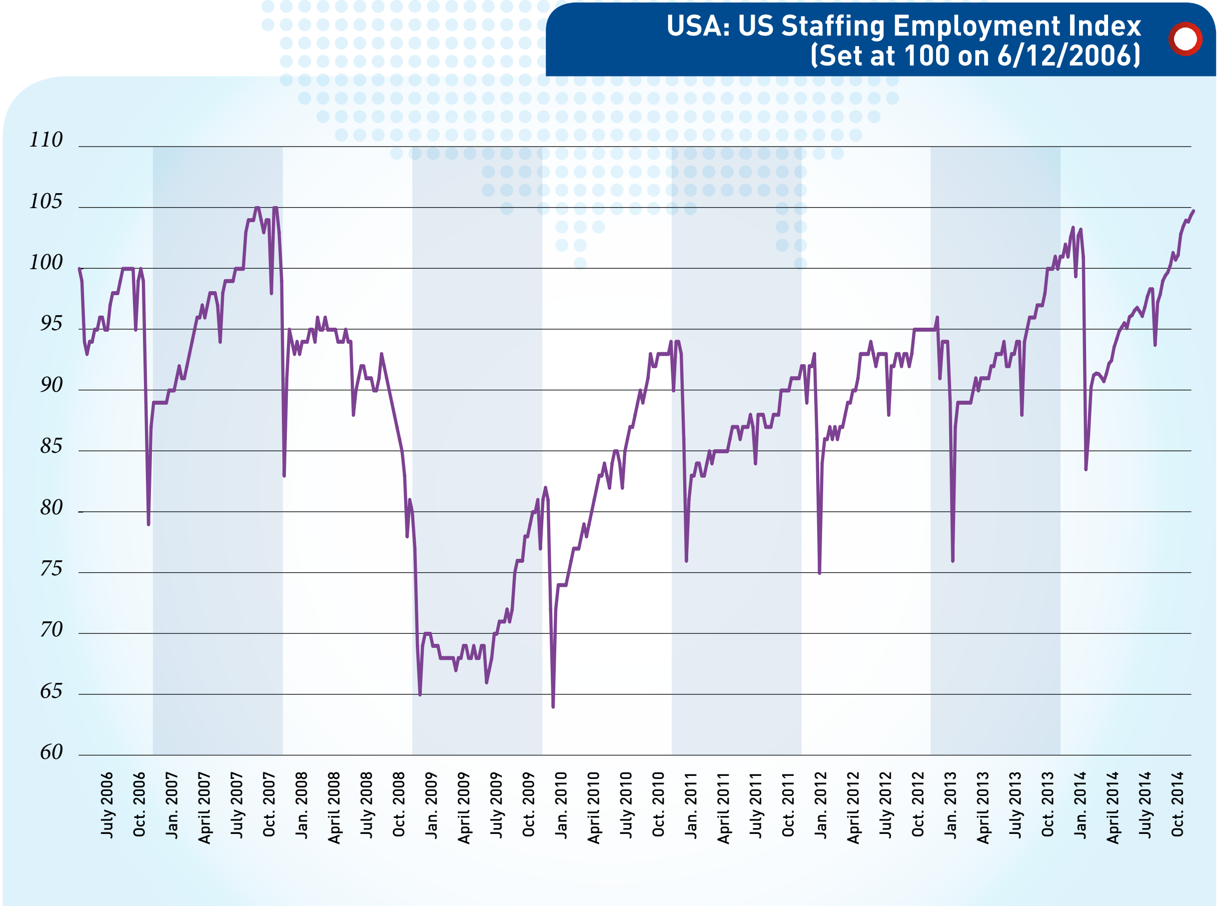
SPECIFIC HR *services*

In the following pages we will dive deeper into several specific HR services that are offered by the employment and recruitment industry.

Not all Ciett members engage in all HR services, and even if they do, data collection may not be up to the same standards for all types of HR services. Data collection for agency work is solid and provides a good overview of agency work around the world. For other services the data provided is more illustrative, and cannot be considered complete.

b) Agency work

6.4% growth Y-O-Y IN JULY 2014



Source: American Staffing Association, ASA Staffing index

USA: Market continues steady growth in 2014

The US staffing index is an indicator of the growth of the US market. In October 2014 for the first time the index reached pre-crisis levels. In the week of 10-16 November 2014 the index hit 105,84, the highest value ever since the index' inception in 2006. Year on year growth is positive, but modest, with a maximum of 6.4% y-o-y growth in July 2014.

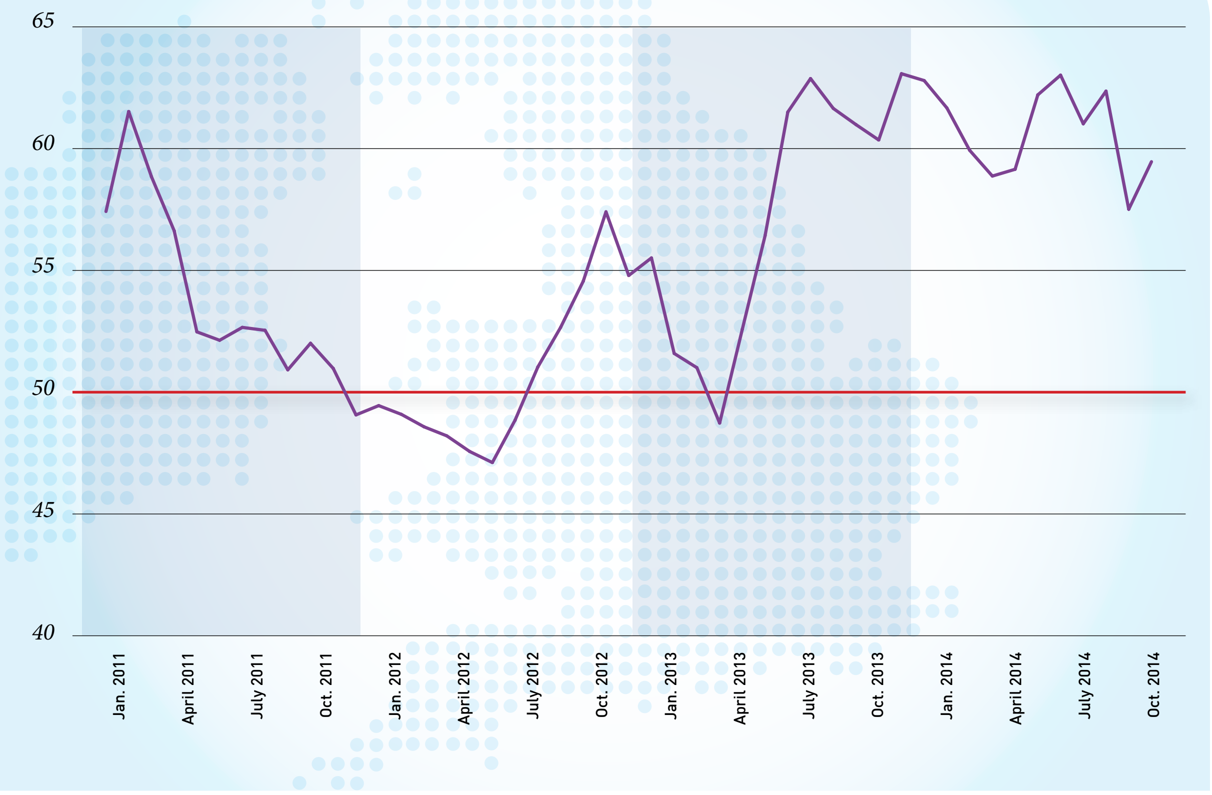
b) Agency work

UK: Constant and steady growth

This index shows that the UK market is growing at a steady pace at least since the summer of 2013, after a period of very low growth or decline since 2011. As the UK represents about 11% of the world market and 30% of the European market this is good news, not only for the employment & recruitment industry, but of course also for the workers who gain access to a job and the companies looking for the right talent.

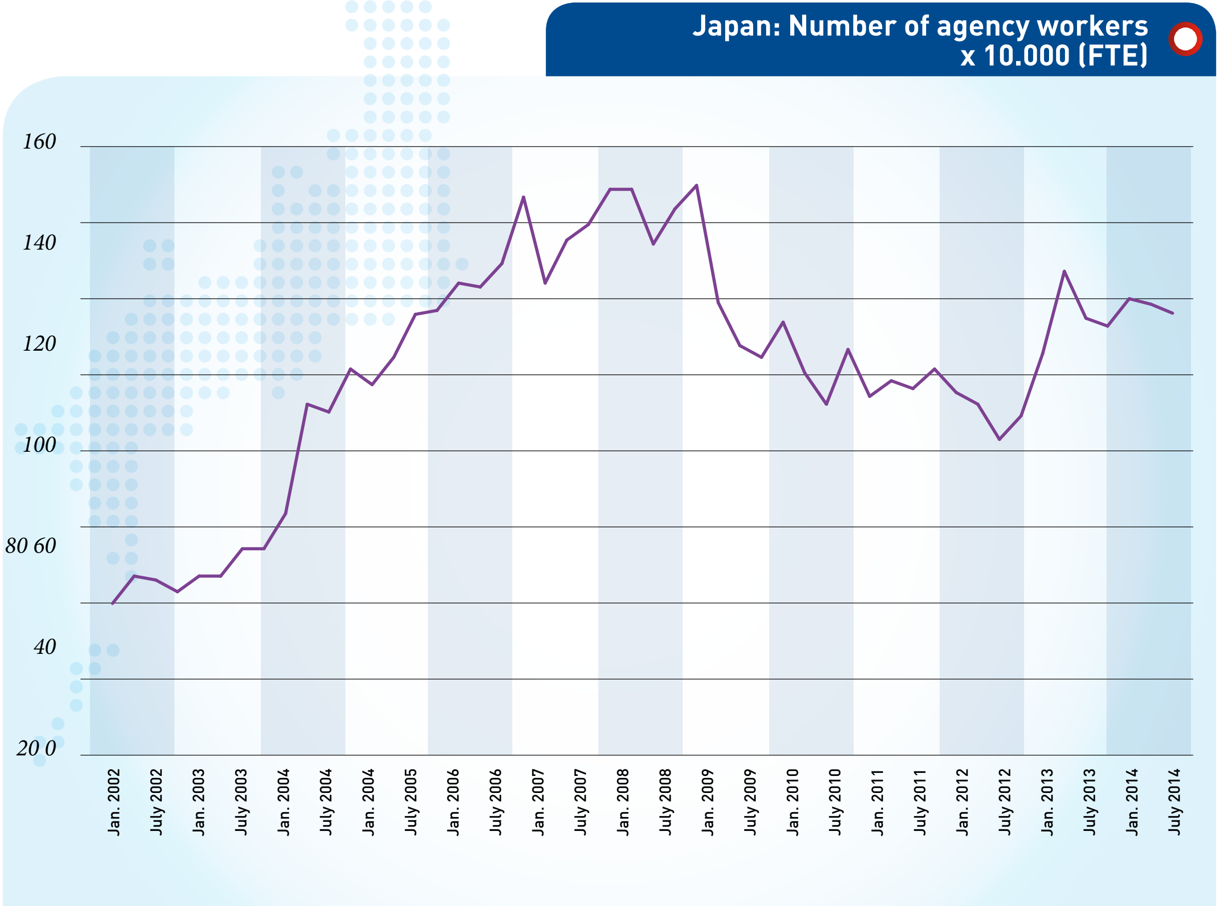
Note: An index reading above 50 signals a higher number of placements/billings than the previous month. Readings below 50 signal a decline compared with the previous month.

UK: Temporary staff billings - Report on Jobs index



Source: REC/KPMG/Markit: Report on Jobs

26% Y-O-Y *growth* IN Q3 2013



Japan: Market hits record high since 2008

The absolute number of agency workers in Japan has reached 1.1 million in Q3 of 2013, a growth of 26% compared to Q3 2012. Q1 of 2013 showed a record high with 1.24 million since Q4 of 2008. The downturn between 2008 and 2013 was caused by the economic crisis as well as restrictive regulation on the use of dispatched (agency) workers. Based on the number of agency workers (in 2012), Japan is the third national market in the world. By turnover however, Japan ranks second with 18.5% of total sales revenue.

Please note that the data from the last few pages on the world's most important markets (indexes, y-o-y growth figures and absolute numbers) are different indicators wich cannot be compared one on one.

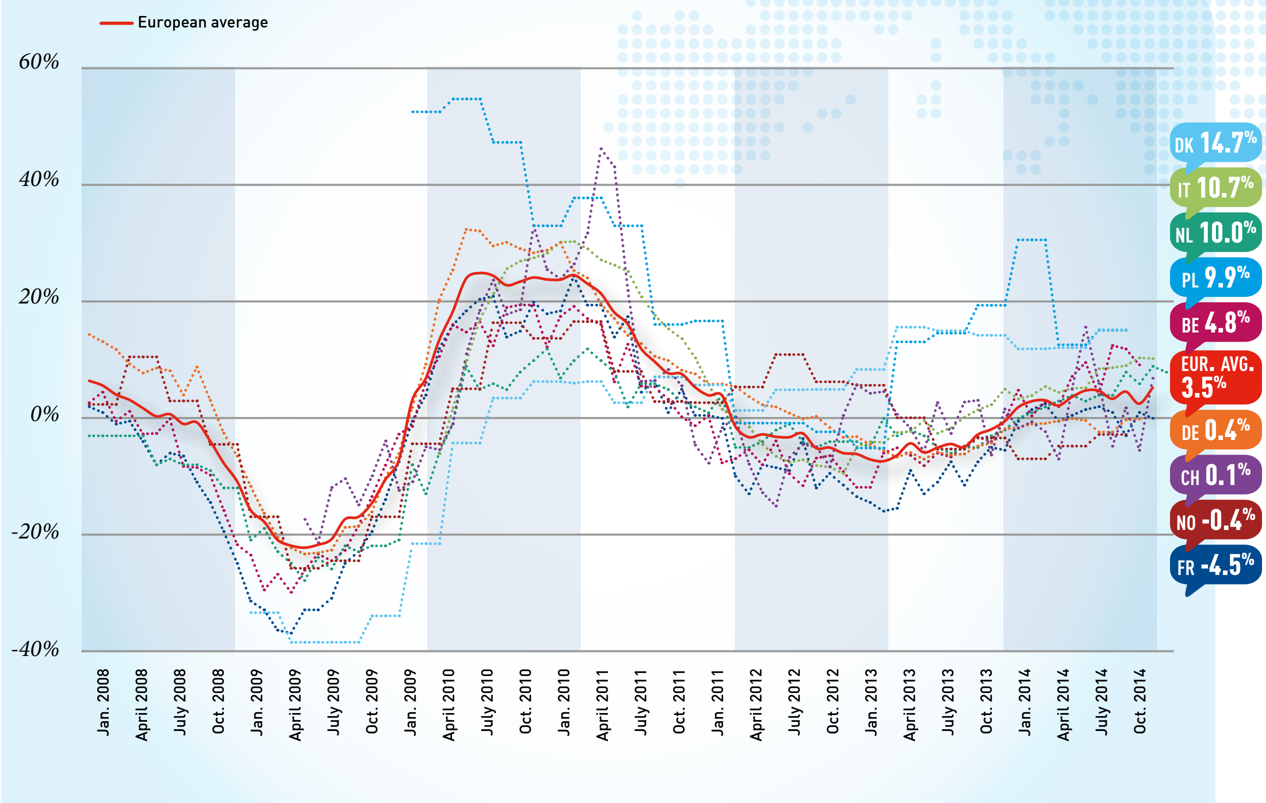
b) Agency work

3.5% AVERAGE EUROPEAN Y-O-Y *growth* IN SEPTEMBER 2014

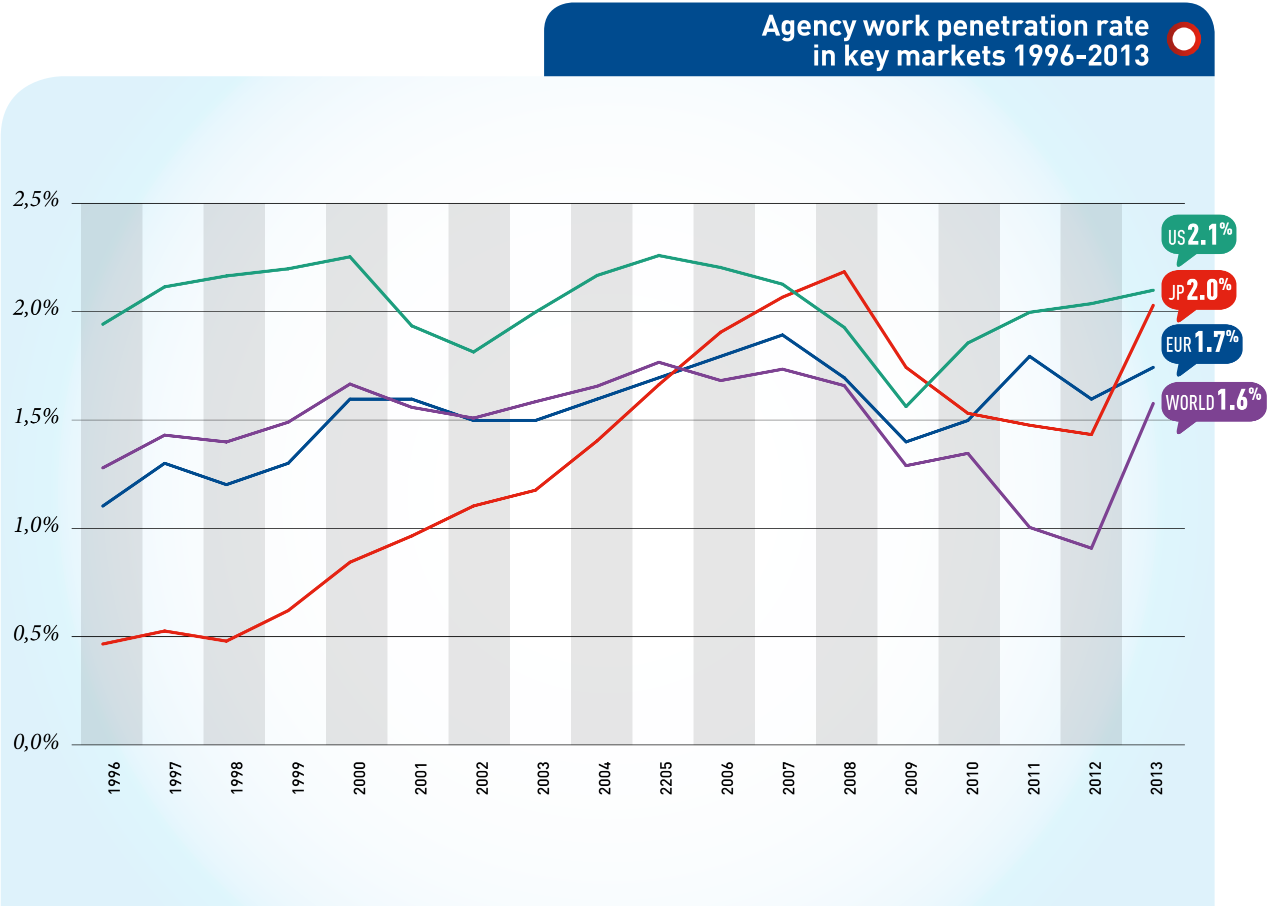
Europe: Increase in growth but mixed picture

The European Agency Work Business Indicator, showing the year-on-year development of agency work hours, shows firmly positive figures. Year on year growth in September 2014 amounted to 3.5%. Growth remains to be hampered however by two of the big European markets that show weak results, Germany (0.4% y-o-y in September) and France (-4.5% y-o-y in October). Better performing countries include Belgium, the Netherlands, Italy, Denmark and Poland.

European Agency Work Business Indicator: Evolution of hours worked, year-on-year change



Source: Ciett national federation members



Source: Ciett national federation members; ILO-ILOSTAT Database, 2013. Note: European average excludes Russia. Note: Historic series European average was revised in 2012.

Penetration rate rising in the three key markets

The penetration rate is the amount of agency workers as a share of the total working population. In 2013, The USA, Japan and Europe all saw an increase in their penetration rates, bringing them closer together: 1,7%, 2.0% and 2.1% for Europe, Japan and the USA respectively. In the USA this is the continuation of a positive trend that already started in 2009, whereas both Europe and Japan saw a deterioration in 2012 that has now been reversed. Both the USA and Europe have now returned to the same penetration rate as in 2007, before the economic crisis started. Japan is slightly below its 2007/2008 penetration rates of 2,1% and 2.2%, which were a record high.

The world average is slightly lower than that at 1.6%, as it includes many markets that are less developed than these top three.

b) Agency work

1.6% *world average* PENETRATION RATE

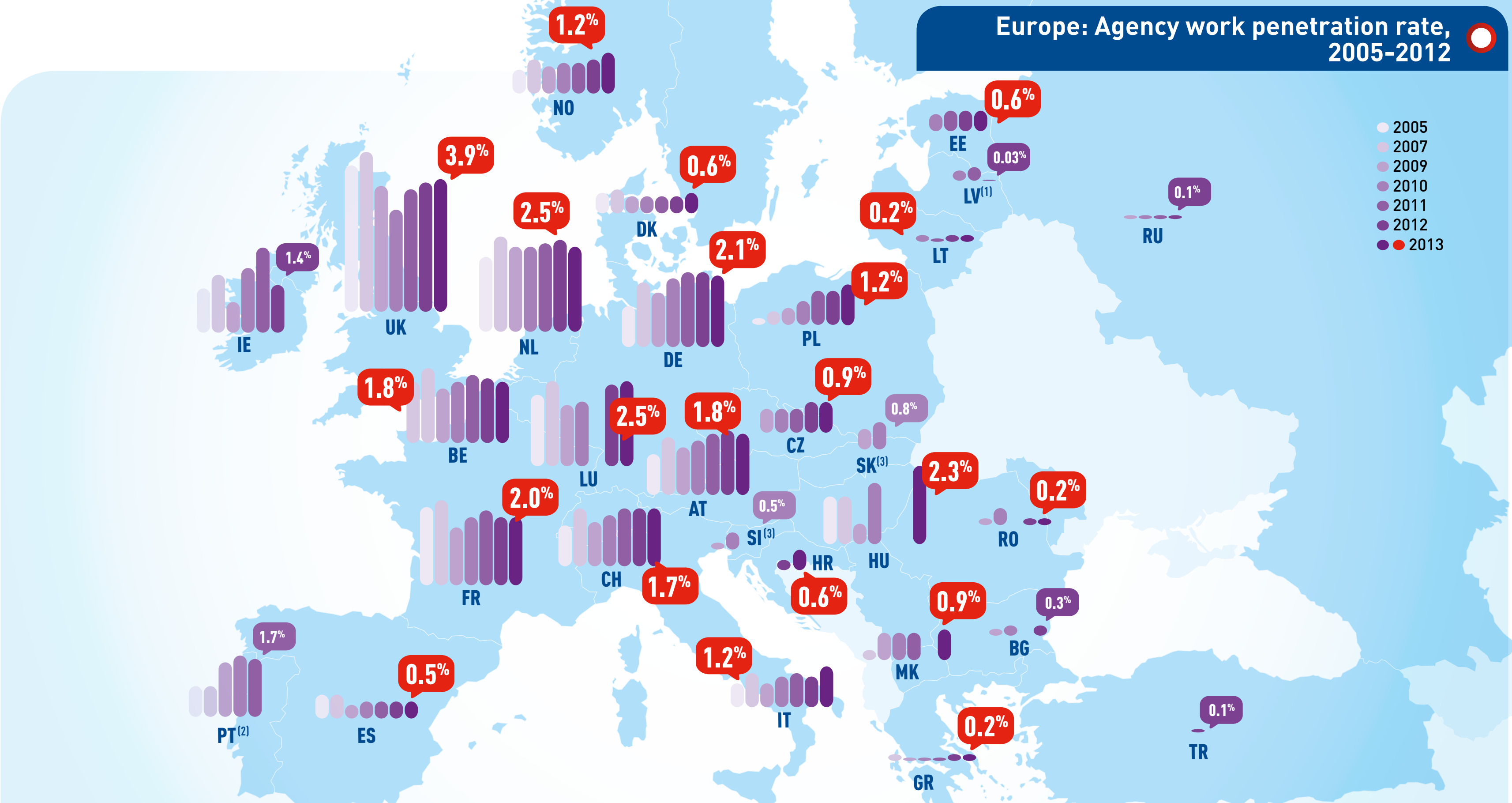
Many markets relatively stable

Penetration rates are quite stable in most markets around the world, but generally show an improvement after a bad year in 2012. The global average, based on 29 countries reporting data over 2013, has risen from 0.9% to 1.6%. The three biggest markets, USA, Japan and Europe all contributed to this positive development.

World: Agency work penetration rate, 2005-2013

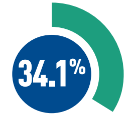
Source: Ciett national federations; ILO - ILOSTAT Database, 2013.

1.7% *Europe* PENETRATION RATE

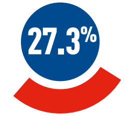


Source: Ciett national federations; ILO - ILOSTAT Database, 2013.

b) Agency work



EUROPE

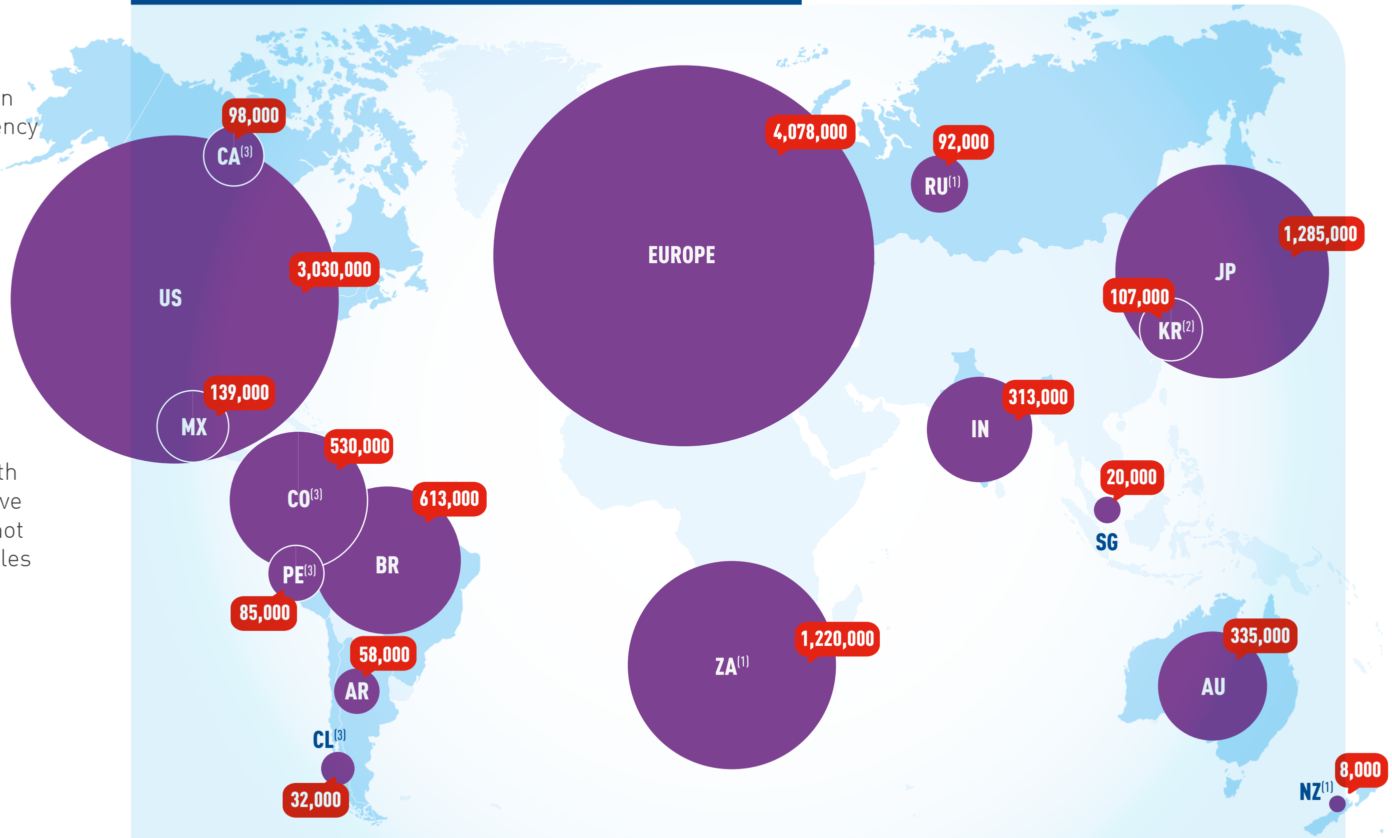


NORTH AMERICA

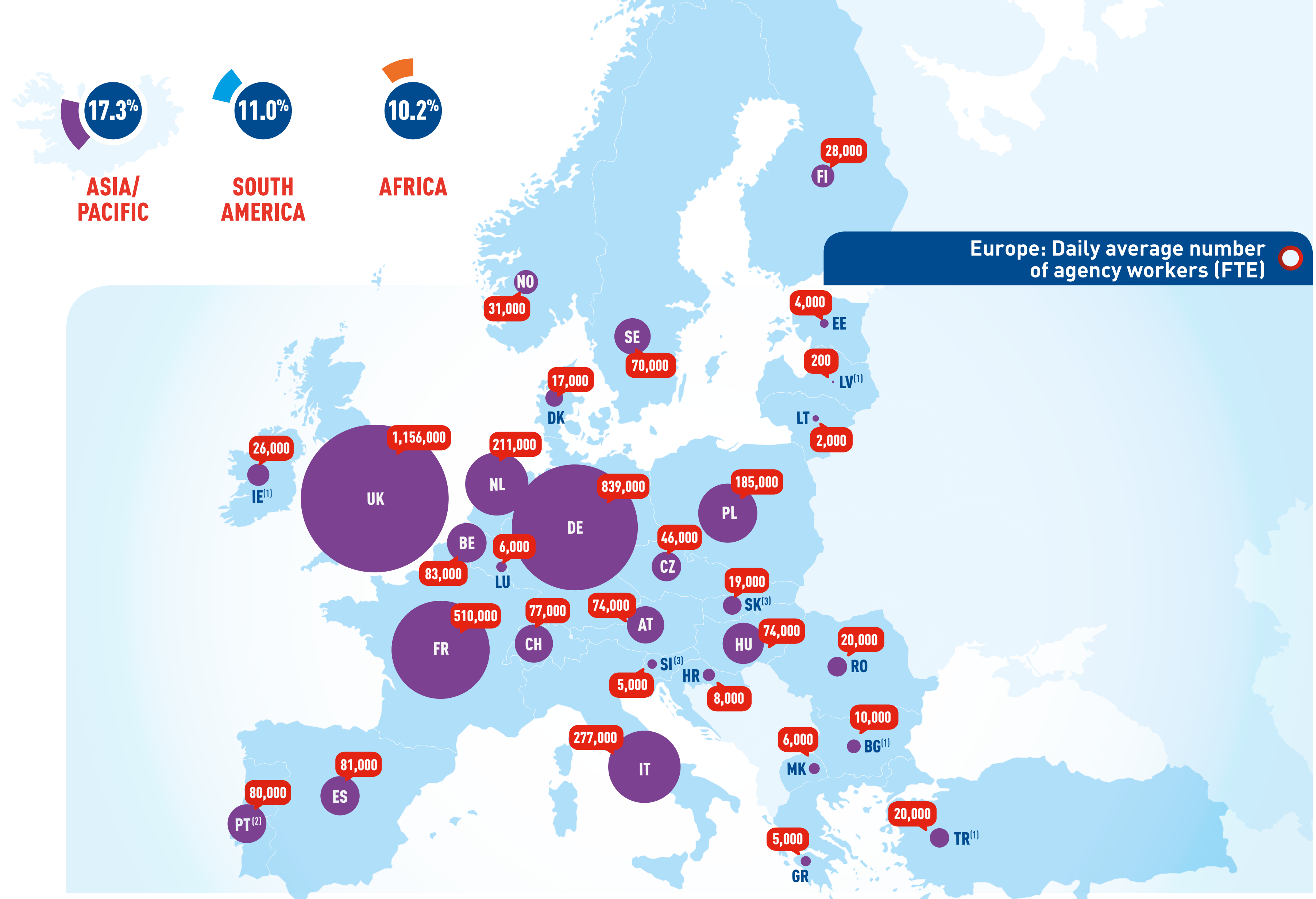
Agency workers filled 12 million full-time jobs in 2013

In 2013, around the world 12 million people were employed daily as agency worker. That is a slight increase compared to 2012. Big increases could be seen in Japan, Italy, Romania, Norway and Poland. On the other hand, the Netherlands, Austria and Germany saw declining numbers in 2013. Not surprisingly, the number of FTE's is closely correlated to the volume of annual sales revenue in a country, with the big countries being USA, Japan and the UK. South Africa is an exception as it does have a high number of FTE's, but does not appear high in the list of annual sales revenue.

World: Daily average number of agency workers (FTE)



Source: Ciett national federations 2013 (1) Source: Ciett national federations 2012 (2) Source Ciett national federations 2011 (3) Source Ciett national federations 2010. (4) Source Ciett national federations 2009. Based on figures from 46 countries

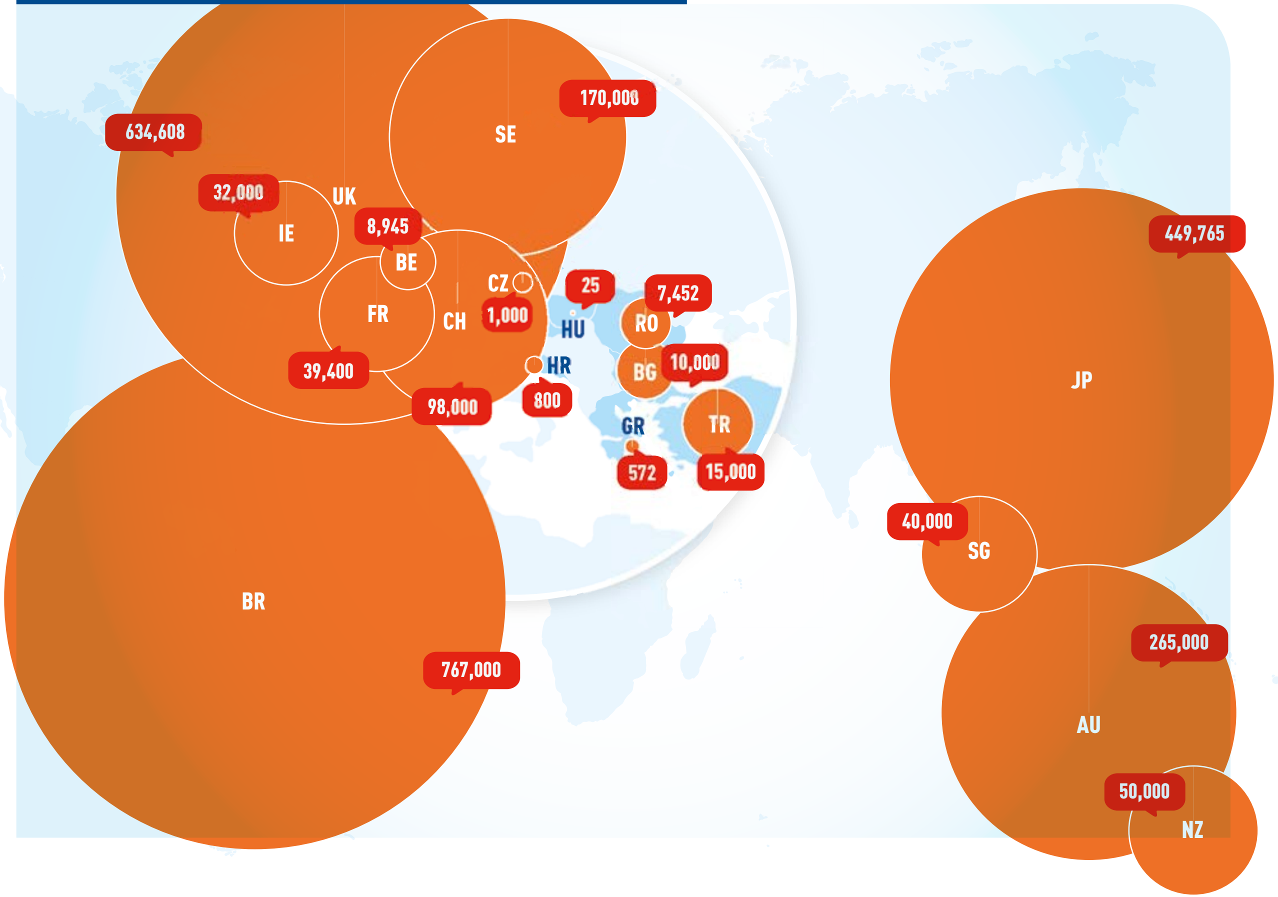

17.3%
ASIA/ PACIFIC
11.0%
SOUTH AMERICA
10.2%
AFRICA
Europe: Daily average number of agency workers (FTE)
FI 28,000
NO 31,000
SE 70,000
EE 4,000
LV[1] 200
LT 2,000
DK 17,000
IE[1] 26,000
UK 1,156,000
NL 211,000
DE 839,000
PL 185,000
BE 83,000
LU 6,000
CZ 46,000
SK[3] 19,000
FR 510,000
CH 77,000
AT 74,000
HU 74,000
RO 20,000
SI[3] 5,000
HR 8,000
BG[1] 10,000
MK 6,000
IT 277,000
ES 81,000
PT[2] 80,000
GR 5,000
TR[1] 20,000

Search and selection bringing millions of people onto the labour market

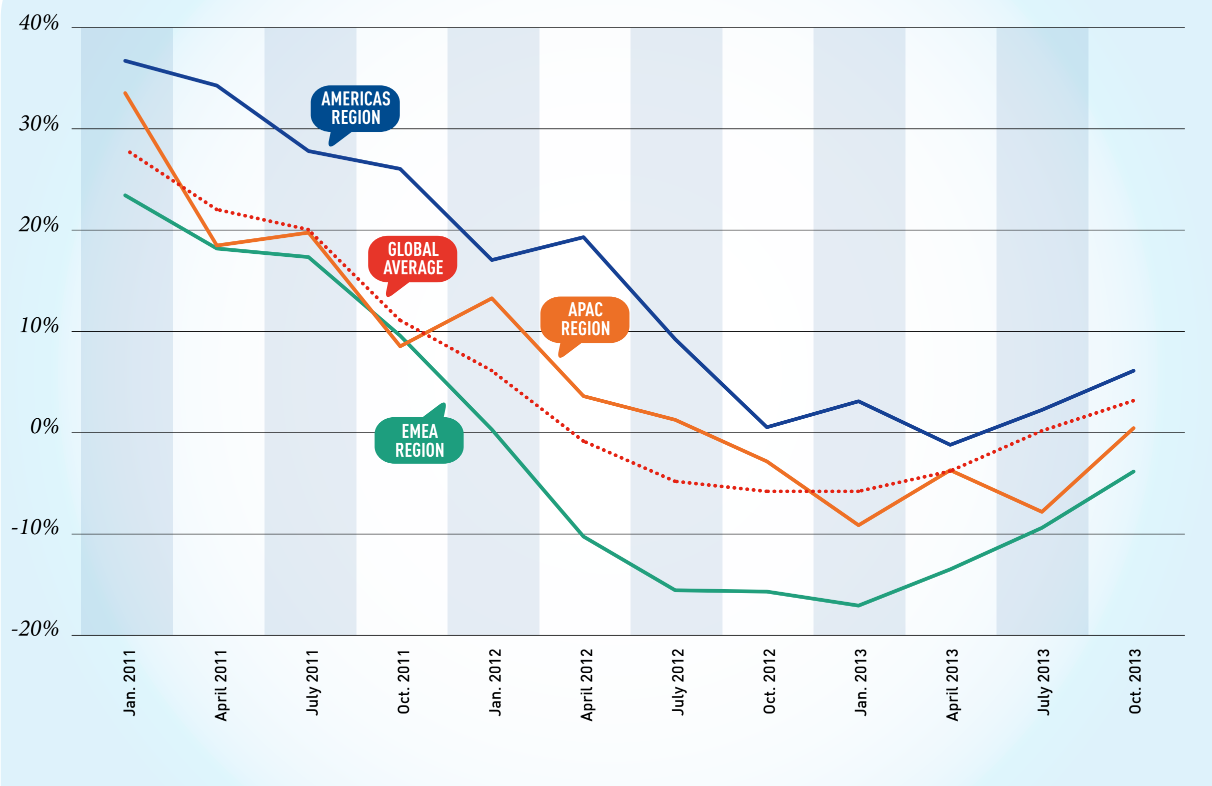
In search and selection, or permanent recruitment as it also may be called, an agency sources the right candidates for a client company that ultimately hires the candidate. Profiles of candidates differ from country to country, and can both be white or blue collar. With 18 countries reporting, the total number of people recruited through an agency amounts to 17.7 million. In reality, the total will be much bigger, as not all countries were able to provide figures on the actual amount of people recruited.

Japan: only assigments longer than four months. If all recruitments would be included 15.48 million (2012).

Total number of placements through search and selection activities



Permanent Placement Fees, Regional Performance - YoY % Change



Sources: Staffing Industry Analysts, AESC, Competitive earnings releases

Search and selection fees recovering after several years of decline

All markets showed improving fees for search and selection over the course of 2013, as reported by Staffing Industry Analysts. It should be noted however that the level of fees does not necessarily reflect how well the sector is doing. As fees are often based on the salary of the sourced worker, higher fees can also reflect a focus on a higher end of the market, more the executive and white collar part of the labour market than blue collar work.

d) Recruitment Process Outsourcing

$4.4 bn *total size* OF THE RPO MARKET

RPO is a quickly growing market

RPO stands for Recruitment Process Outsourcing. RPO is a form of Human Resources Outsourcing, but does not include payroll administration etcetera. Instead, it focuses on sourcing and matching candidates for a user company or employer, while it may also include hiring staff. Because RPO is a relatively nascent part of the employment and recruitment industry, there is not as yet a clear cut and widely agreed defintion. RPO and HRO are in turn a subset of Business Process Outsourcing.

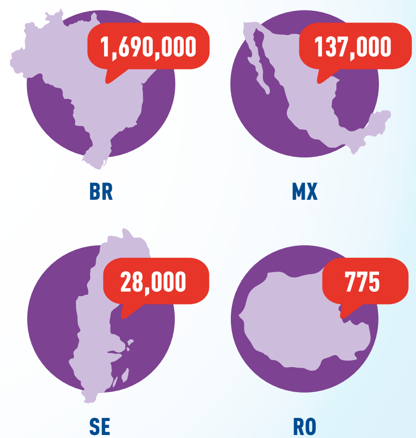
Staffing Industry Analysts estimates the total size of the RPO market at $4.4 Bn in 2013.

Note: Brazil data also includes other forms of BPO.

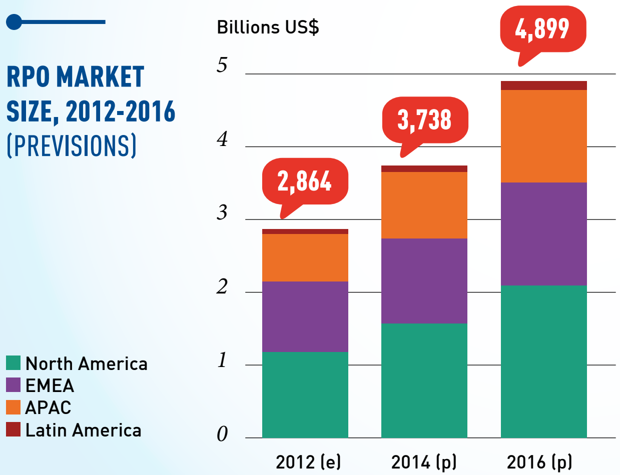
Recruitment Process Outsourcing

RPO IS PART OF HRO, PART OF BPO

TOTAL NUMBER OF INDIVIDUALS OUTPLACED BY PRIVATE EMPLOYMENT SERVICES IN SELECTED COUNTRIES



RPO MARKET SIZE, 2012-2016 (PREVISIONS)



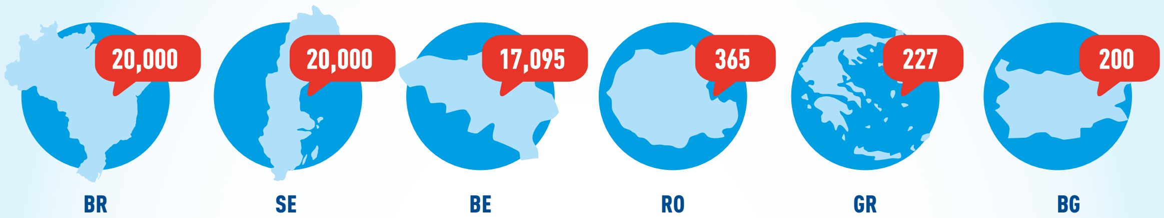
Sources: Top: Ciett national federation members. Bottom: KellyOCG Global Trends in RPO and Talent Recruitment 2014 (Nov 2013); Nelson Hall; Recruitment Process Outsourcing Association (2014); RPO is on the go, Workforce (Feb 2014)

e) Outplacement

$2.2 bn *total* OUTPLACEMENT

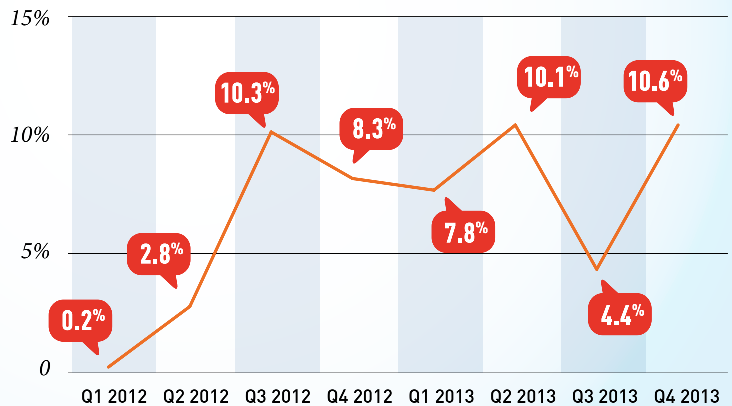
Outplacement

TOTAL NUMBER OF INDIVIDUALS OUTPLACED BY PRIVATE EMPLOYMENT SERVICES IN SELECTED COUNTRIES



OUTPLACEMENT SERVICES - COMPETITOR PERFORMANCE

YOY % CHANGE (ADECCO, MANPOWER, TEMP HOLDINGS, PASONA)



Source: Ciett national federation members (top). Staffing Industry Analysts; competitor earnings releases/transcripts/press releases; oipartners.net; "The Future of the Outplacement Industry Roundtable Discussion" (2012) , Insala.com (bottom).

Employment & recruitment industry gaining foothold in outplacement

Outplacement is a service to guide a terminated employee of a company to a satisfactory new position or career. Employment and recruitment agencies are increasingly providing short- or long-term counseling and support services to people looking for a new job. This can happen on a group or individual basis and is most often paid for by the terminating employer. Outplacement is a service that Ciett members are becoming increasingly active in. The size of this market is estimated at $ 2.2 bn.

Online recruitment is an innovative HR service

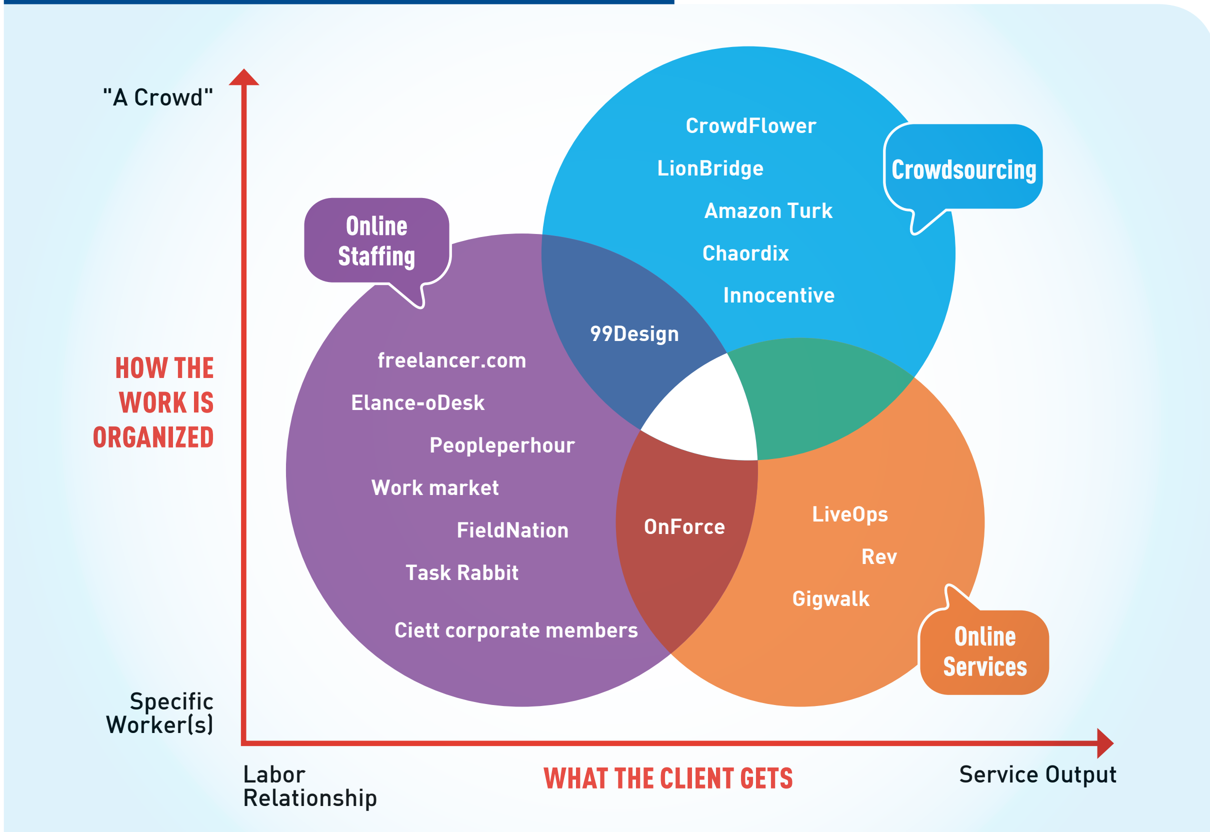
Several models of online recruitment platforms exist today, providing different ways of sourcing the work as well as different potential outcomes. Services by Ciett corporate members could mostly fit under online staffing.

Online Staffing an online platform model that enables specific hirers and specific (typically contingent) workers to enter into, complete, and transact work arrangements, is the oldest "human cloud" model (arising in the early 2000s). There is a direct contractual/legal relationship between hirer and worker, which the platform enables. Well-known names are Elance-oDesk, but there were over 115 different platform businesses in this segment ($1.5 global billings in 2013).

Online Services an online platform model that enables the delivery of certain specialized services (customer service, translation, writing, etc.) performed by a managed group of online workers organized/managed by the platform provider. The client is purchasing "an outcome" (as a service output, not a labor relationship). Though the model was launched by LiveOps before 2000, only recently have more businesses (like Rev) begun appearing in this segment.

Crowdsourcing an online platform model that enables work assignments to get parsed-out and performed (often as disaggregated "microtasks") by a far-flung "crowd" of independent workers who perform (paid or otherwise compensated/incented) work at will, first arose in 2005 (Amazon's Mechanical Turk). Typically, the client of a "crowdsourcing" platform is purchasing "an outcome" (as a service output, not a labor relationship). In 2012, there were over 60 different businesses in this segment.

Online staffing and recruitment

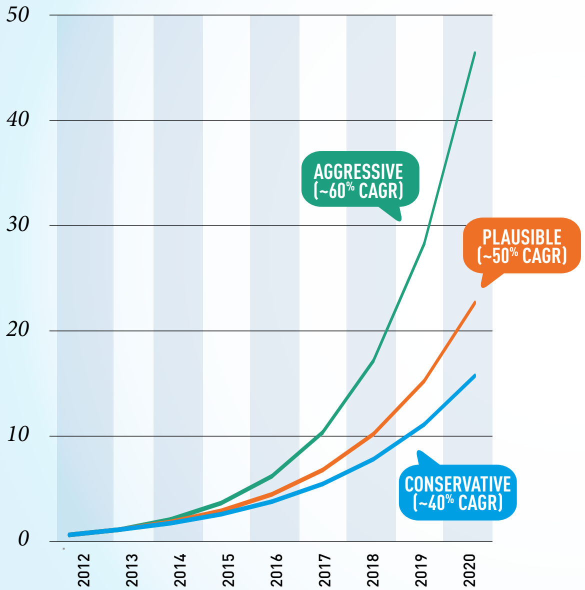


Source: Staffing Industry Analysts; Online Staffing platforms: 2014 landscape

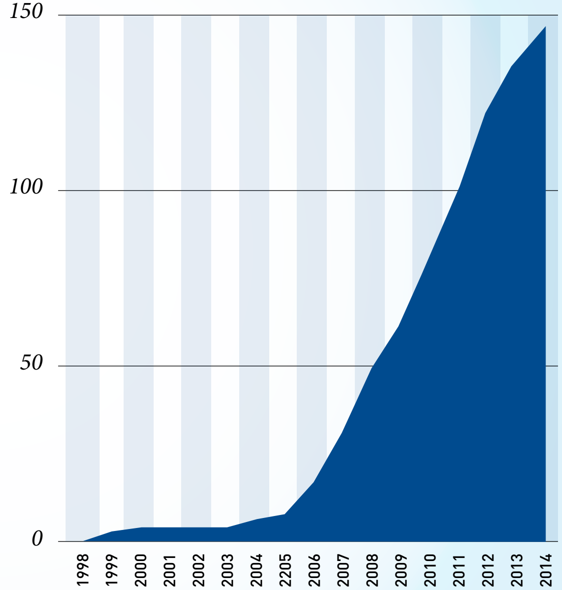
16 AVERAGE ANNUAL RATE OF *new startups* FROM 2006-2013

Online staffing and recruitment

ONLINE STAFFING FORECAST (2012-2020)



CUMULATIVE NET NEW ONLINE STAFFING PLATFORM[1] (By Year Started)



Source: Staffing Industry Analysts; Online Staffing platforms: 2014 landscape

Online recruitment one of the fastest growing markets

The global online staffing market is estimated at $1.5B in 2013. Even the most conservative estimate projects the market size will grow 40% annually to reach $16B by 2020. This means this type of HR service is a fast developing way of organizing work.

Today, there are about 145 online staffing businesses, growing at an average rate of about 16 per year. This trend seems to be continuing.

2

AGENCY WORK
and the economy

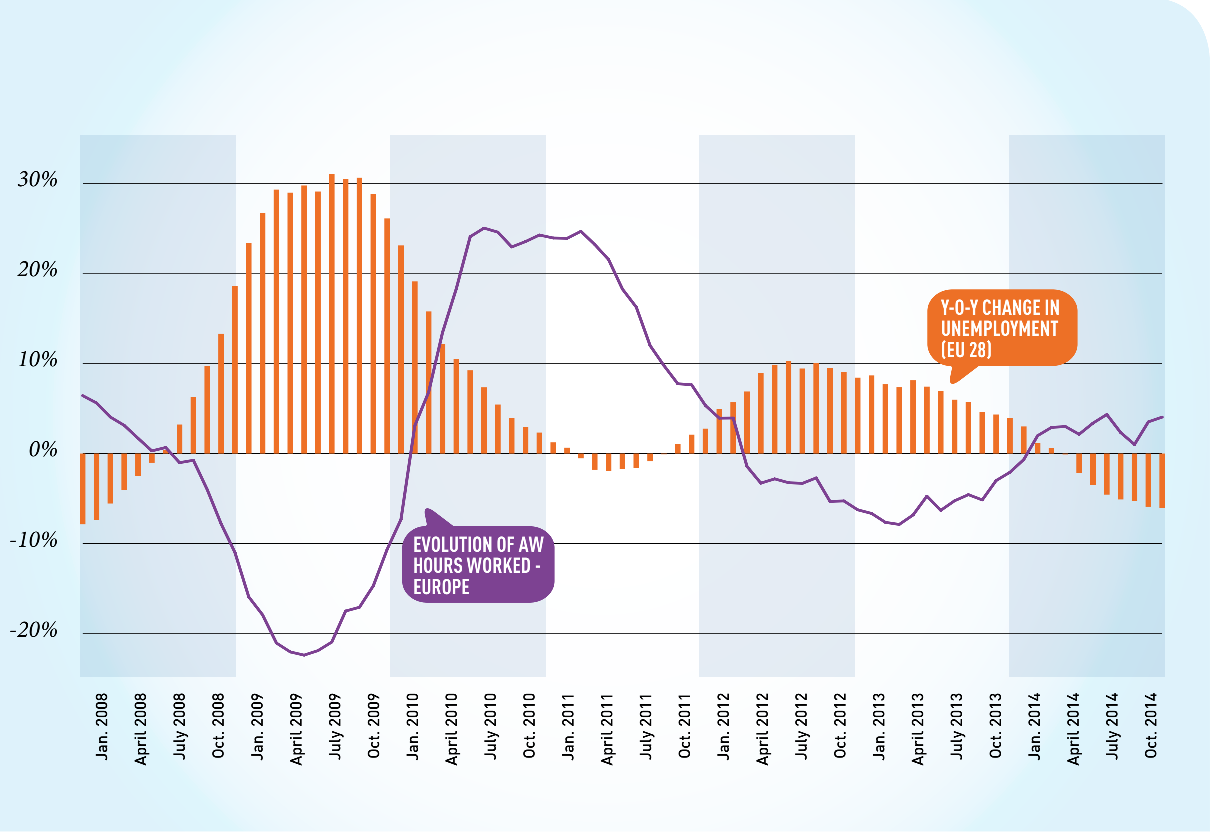
As has been shown before, agency work shows a strong correlation to several other economic indicators. In this chapter we will explore those correlations, illustrating how **AGENCY WORK IS AN IMPORTANT WAY FOR LABOUR MARKETS TO ADAPT TO ECONOMIC CHANGE.** *It also shows that agency work is a catalyst, rather than a substitute of job growth.*

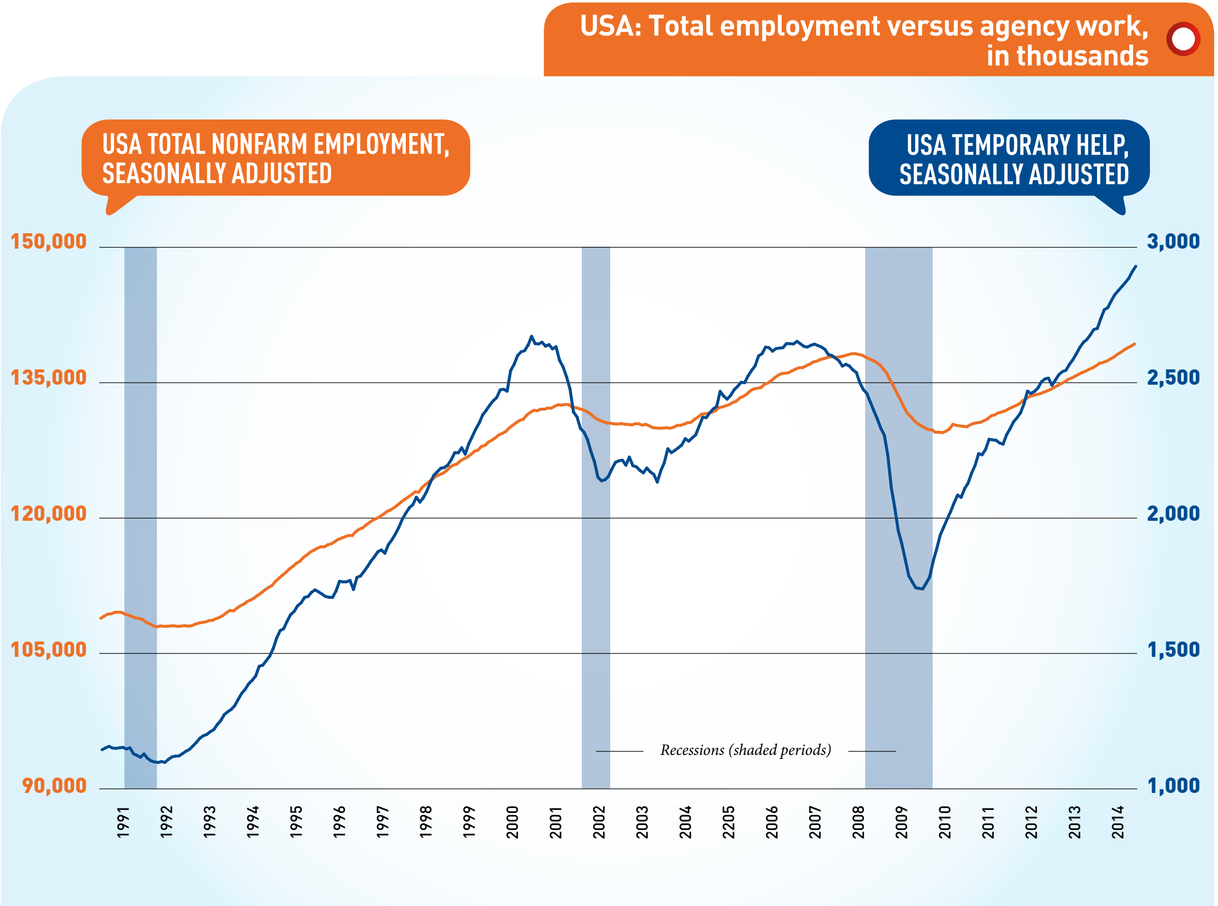
> **"THE ECONOMIES WITH MORE FLEXIBLE LABOUR MARKETS WERE THE ONES THAT HAVE WEATHERED THE CRISIS BEST IN TERMS OF EMPLOYMENT."**
>
> Herman van Rompuy, President of the European Council, at the Tripartite Social Summit, October 2014

Europe: Unemployment going down as agency work continues to grow

In Q2 2014, EU unemployment levels fell by 5,4% compared with the same period in 2013. As the number of agency hours worked grew by 4.2% in the same period, it shows that general employment levels caught up with agency work. Agency work showed the first positive growth in October 2013, while unemployment levels started to drop in December 2013 (with 0.1%). The delay of two to three months between agency work and general unemployment illustrates the way that agency work is able to respond to economic developments quicker than other forms of work.

Europe: Evolution of number of hours worked by agency workers versus average EU 28 unemployment change (year on year)





Source: U.S. Bureau of Labor Statistics

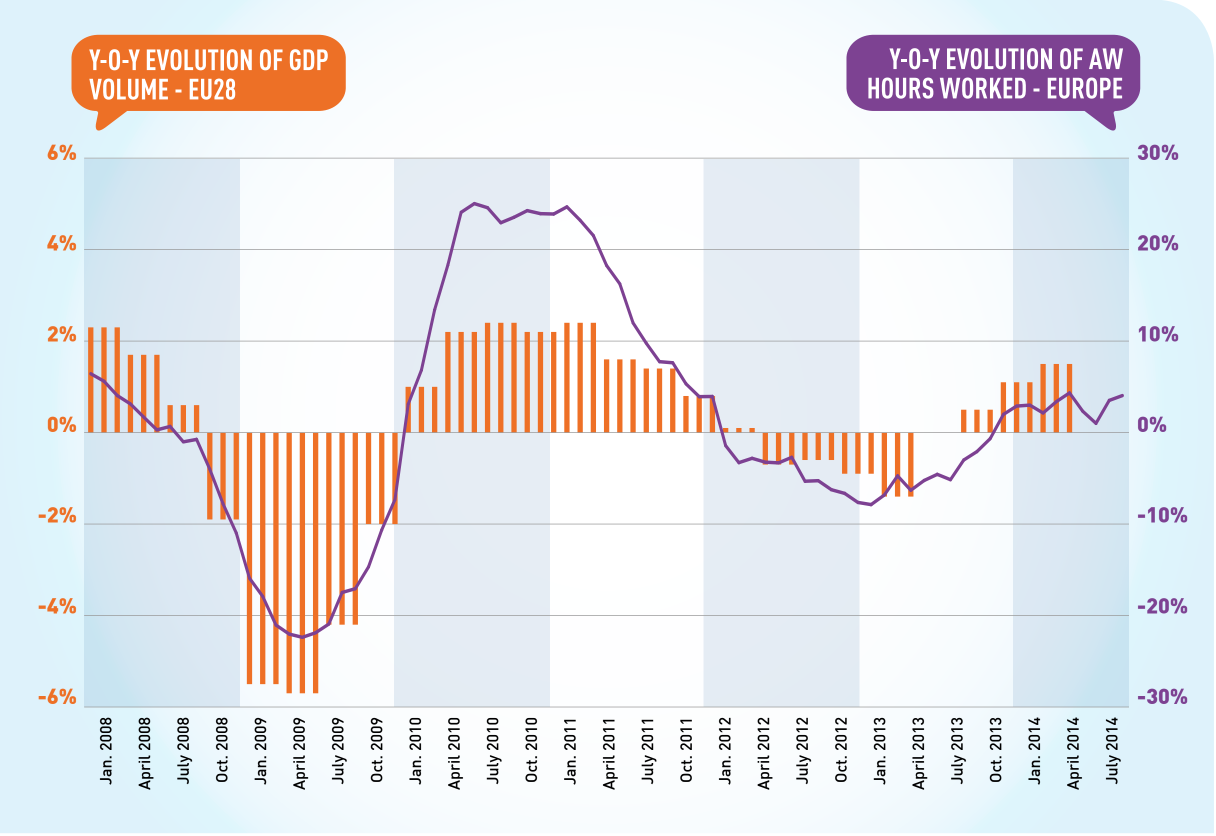
USA: Agency work precedes general employment trend

In the USA, as in Europe, the agency work industry will usually respond quicker to economic trends – both positive and negative - than general employment. For example, in the 2009 recession, agency work started growing again in September, which was about 6 months before general employment. The flexibility that agency work offers gives businesses an opportunity to turn newly available work into real jobs. This also means that agency work can be considered a leading economic indicator. This graph also shows very clearly how agency work is a cyclical industry, which responds more markedly to economic developments than general employment levels.

Europe: Agency work growth lagging behind GDP development

Generally, agency work and GDP growth develop simultaneously: if GDP goes up, agency work is one of the first sectors to benefit from that. As companies may have more work, but perhaps not yet enough confidence to directly hire more employees, agency work may be an excellent way for those companies to access the right talent, and turn available work into jobs. In 2014 the same happened, but it seems agency work is not yet able to benefit as much from the GDP growth as on previous occasions, such as in 2010/2011. This may indicate that the recovery is still fragile.

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



Source: Ciett national federation members / Eurostat

Relation between different forms of work and GDP growth rate

EU15: CORRELATION COEFFICIENTS OF DIFFERENT FORMS OF WORK IN ABSOLUTE TERMS

	OPEN-ENDED CONTRACTS	SELF-EMPLOYMENT	AGENCY WORK
OPEN-ENDED CONTRACTS	1.00	0.92	0.91
SELF-EMPLOYMENT	0.92	1.00	0.95
AGENCY WORK	0.91	0.91	1.00

EU15: CORRELATION COEFFICIENTS BETWEEN DIFFERENT FORMS OF WORK IN RELATIVE TERMS (SHARE IN TOTAL EMPLOYMENT) AND EVOLUTION OF THE REAL GDP

	REAL GDP (YEAR T)	REAL GDP GROWTH RATE (YEAR T+1)
OPEN-ENDED CONTRACTS	-0.81	0.10
SELF-EMPLOYMENT	0.17	-0.18
AGENCY WORK	0.95	-0.06

- VERY STRONG POSITIVE CORRELATION: IF ONE GOES UP, THE OTHER GOES UP ALMOST AS MUCH
- STRONG POSITIVE CORRELATION: IF ONE GOES UP, THE OTHER GOES UP SLIGHTLY LESS
- POSITIVE CORRELATION: IF ONE GOES UP, THE OTHER ALSO GOES UP SLIGHTLY
- NEGATIVE CORRELATION: IF ONE GOES UP, THE OTHER GOES SLIGHTLY DOWN
- STRONG NEGATIVE CORRELATION: IF ONE GOES UP, THE OTHER GOES DOWN SIGNIFICANTLY

These correlations demonstrate that no form of work is growing at the expense of another (in particular, the evolution of agency work is strongly positively correlated to the evolution of open-ended contracts).

Source: IDEA Consult based on Eurostat (LFS Data) and Ciett data.

Europe: Positive relation between agency work and other forms of work

The left table demonstrates that in absolute terms, no form of work is growing at the expense of another.

Meanwhile, the right table shows relative correlations (share in total employment). If the share of one form goes, up, by definition another form goes down. In a given year, agency work directly follows GDP developments and is thus pro-cyclical, while open-ended employment needs a one-year time lag to follow the same development as GDP. This illustrates the higher flexibility of temporary (agency) work: this workforce is first to adapt to economic conditions. After a while, businesses have been able to adapt their regular workforce: then the size of open-ended employment adjusts to economic conditions.

CONTRIBUTION *of the employment and recruitment industry* TO LABOUR MARKETS

There are many ways in which the employment and recruitment industry contributes to better functioning labour markets. As labour market intermediaries, employment and recruitment agencies have a deep knowledge of labour markets. **THIS MEANS THAT THEY CAN OFFER INSIGHTS AND PRACTICAL TOOLS** *to workers looking to navigate the world of work, but also to companies and policy makers.*

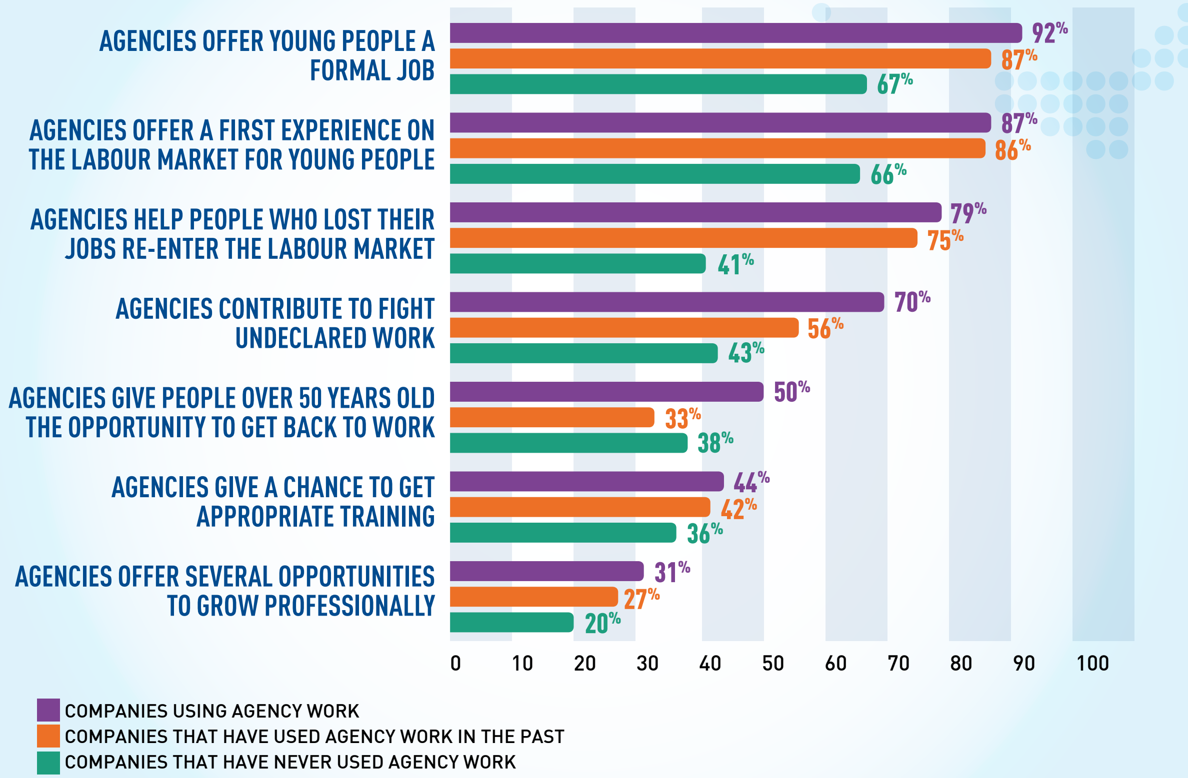
> **"THE POSITIVE CONTRIBUTION THAT PRIVATE EMPLOYMENT AGENCIES MAKE TO THE WORLDWIDE EMPLOYMENT AND ECONOMIC OBJECTIVES SHOULD BE FULLY RECOGNIZED BY NATIONAL GOVERNMENTS, INTERNATIONAL INSTITUTIONS AND RELEVANT STAKEHOLDERS.**
>
> **INDEED SERVICES PROVIDED BY PRIVATE EMPLOYMENT AGENCIES CAN BE PART OF THE SOLUTION TO IMPROVE THE EFFICIENCY OF THE LABOUR MARKETS"**

ILO Country Office for Bangladesh,
"Promoting cooperation for safe migration and decent work" – 2014

Italy: companies highly positive on contributions of agency work to the labour market

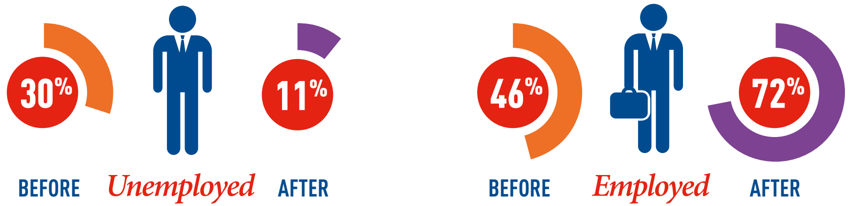
The results of this survey, held among a representative group of Italian businesses, clearly shows that companies see and appreciate the role of agency work on the labour market. Also, companies that have experience with agency work are much more positive about the contributions of the employment & recruitment industry to the labour market than companies that have never used one of our services. Apparently, companies have an unjustifiably bad image of our industry, which is corrected once they get in touch with an actual agency.

Italy: companies that agree with the following statements:



Source: Il mondo del lavoro e I contratti di somministrazione. Ipsos public affairs for Assolavoro, 2014

a) Stepping stone



Employed / unemployed before and after agency work

Agency work helps people move out of unemployment...

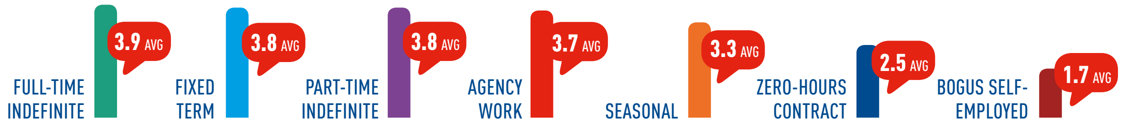
People who start doing agency work out of unemployment will often not return to unemployment after their assignment. Although there are significant differences between the countries, each show that agency work is a stepping stone out of unemployment into work. In Brazil for example, 85% of agency workers come out of unemployment, and only 30% of them return to unemployment after their agency work assignment. Clearly, people use the experience and skills they obtain while working as an agency worker to make a next move on the labour market.

...and provides a stepping stone to longer lasting employment

People who start working as an agency worker can do so either from employment or unemployment, but also from education or inactivity. Through agency work, they do not only have a good point of entry to the labour market, but they are also able to stay in employment up to 12 months after their agency work assignment ended.

3 CONTRIBUTION OF THE EMPLOYMENT AND RECRUITMENT INDUSTRY TO LABOUR MARKETS

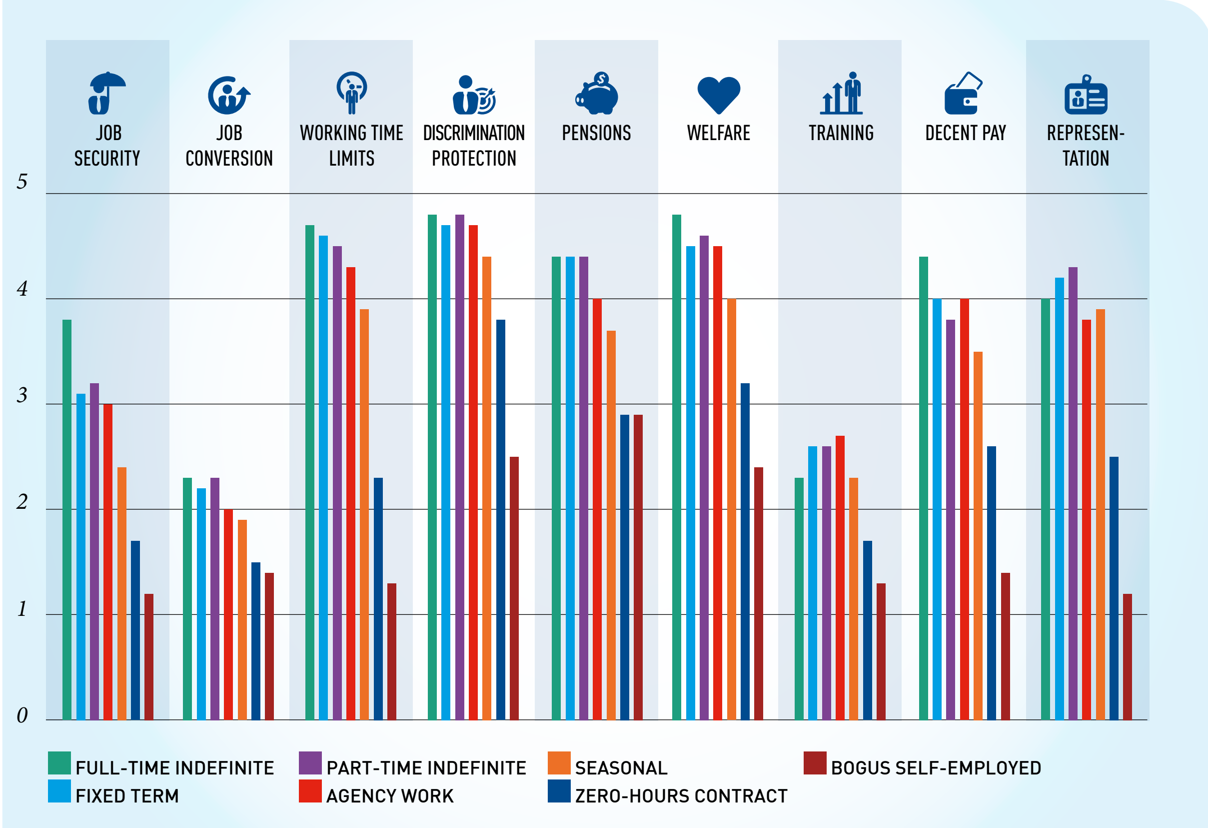
b) Job quality



Agency work ranks high on job quality

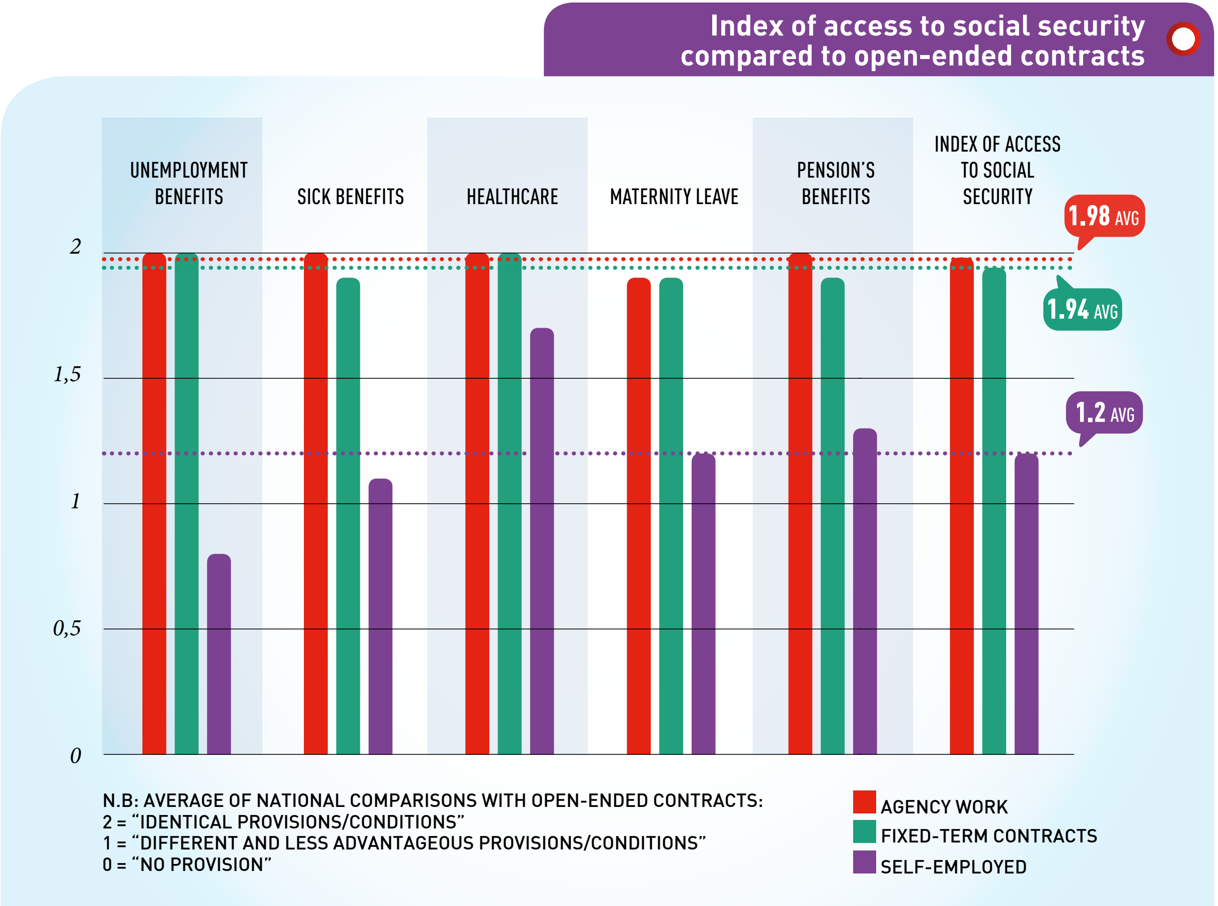
The London Metropolitan University devised a ranking of the quality of various types of employment. This ranking was based on 9 criteria. By giving a score between 1 and 5 to each of them, they came up with an average ranking of job quality that is based on more than only the legal protection against dismissal. It shows that full-time open ended contracts, part-time open-ended contracts, direct fixed term contracts and agency work are all comparable in terms of overall job quality. It shows that informal work and bogus or false self-employment are the forms of work that offer the worst job quality. Agency work, being a well-regulated form of work in most countries, offers high job quality, especially in terms of access to wellfare and pension, working time limits, discrimination protection and also on job security.

Job quality rating based on averages for 12 European countries



Source: Study on precarious work and social rights, carried out for the European Commission. Working lives research Institute, Faculty of social sciences & humanities, London Metropolitan University

index of SOCIAL PROTECTION



Source: How agency work compares to other forms of work. IDEA Consult for Eurociett/UNI-Europa. Expected February 2015.

Agency work offering good access to social security and vocational training

Agency work offers almost the same access to social security as people in open-ended employment relations have. That means it offers slightly more protection than people in fixed term employment have. This is explained by some specific legal provisions that exist only for agency workers such as regarding sick leave for agency workers in the Netherlands or on pension rights for agency workers in Norway. People in self-employment have significantly lower social protection.

b) Job quality

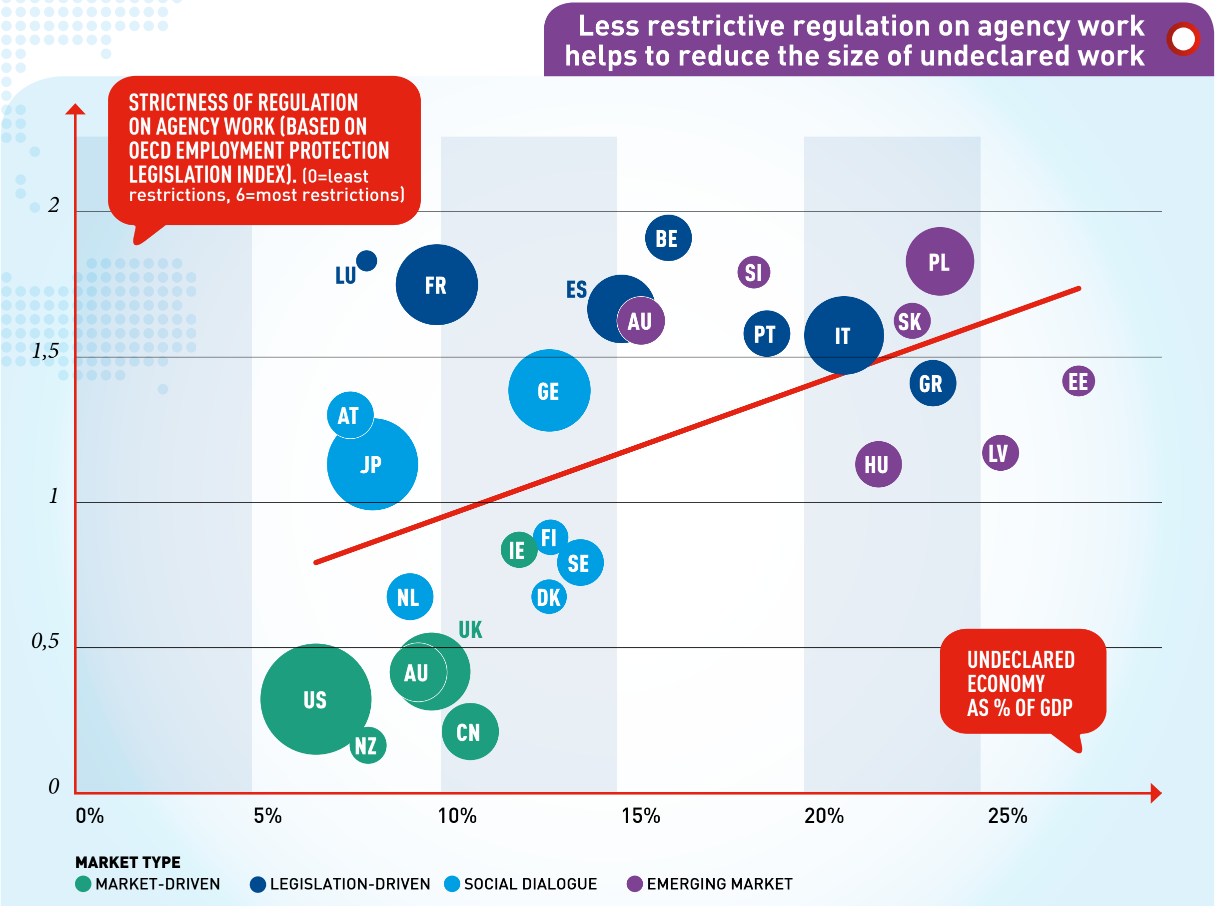
Europe: Agency work offers better quality work than fixed term contracts

Based on a survey among trade unions and agency work federations in Europe, as well as on Eurofound data, a joint research by Eurociett and trade union UNI-Europa concludes that agency work offers more protection to workers than fixed-term employment can offer. The level of protection is almost as high as under open-ended contracts. Self employment scores significantly less.

Combined index of job quality

Source: How agency work compares to other forms of work. IDEA Consult for Eurociett/UNI-Europa. Expected February 2015.

[1] This category includes information that go beyond the definition of the European Directives. More specifically, this category includes evaluation of the working time limits and pay but also, evaluation of the satisfaction of workers with the hours worked and the evaluation of the duration, the scheduling and the short-term flexibility over working time.
[2] Each form of work gets a score from 3 to 1 based on an analysis of some results of the EWCS (2010) used in the study.
[3] The index is calculated on the basis of the national comparisons with open-ended contracts: 2 stands for "identical provisions/conditions", 1 stands for "different and less advantageous provisions/conditions" and 0 for "no provision".
[4] This index is calculated as follows: 2 stands for "initiatives developed by Social Partners", 1 stands for "initiatives developed in some sectors only" and 0 for "no initiative developed".



Source: Ciett national federations

Less restrictive regulation on agency work helps to reduce the size of undeclared work

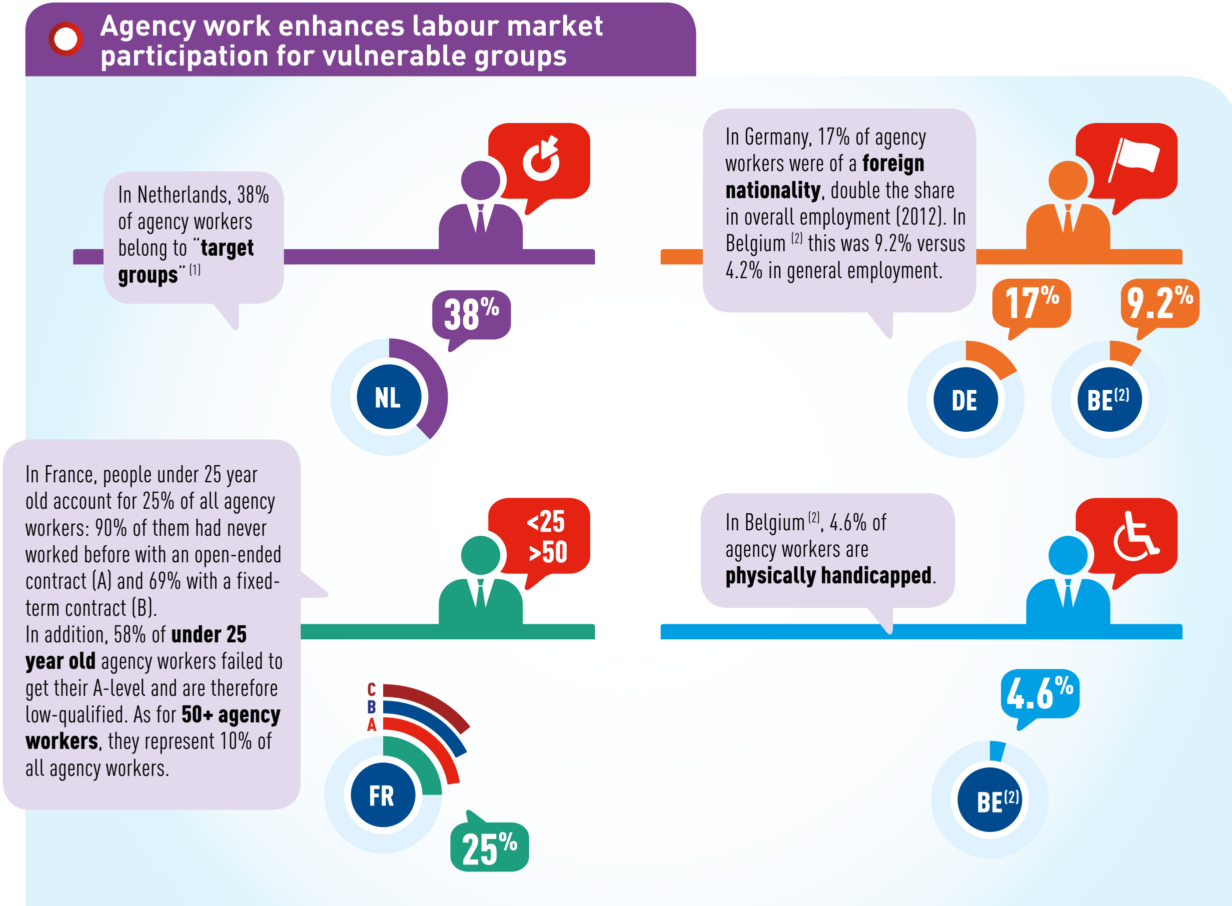
Agency work offers companies and workers a decent alternative to undeclared work. Therefore, a direct relation can be seen between the level of regulation on agency work and the incidence of undeclared work. More restrictive regulation on agency work is often seen to push companies and workers towards other forms of flexible labour including undeclared work.

What is typical to note is that countries performing best both on both indicators are either market driven economies or markets where social legislation is to an extend determined by social dialogue, allowing for quick adaptation to labour market needs. Ligislation driven countries such as in Southern Europe perform less well, as do countries with economies that are in a relatively emerging state, mostly in Central and Eastern Europe.

c) Inclusion

Agency work enhances labour market participation for vulnerable groups

Agency work gives people a chance to prove their worth, even if they are coming from a stigmatized group that may have less opportunities on the labour market. This includes people with disabilities, people with foreign nationalities, but also groups such as younger or older workers and women. Having a direct relation with the worker, an agency is capable of assessing their actual qualities, while a user company is not taking a (perceived) risk by hiring that worker.



(1) Elderly, women, minorities, people with disabilities or long term unemployed - (2) Flanders only - Source: Ciett national federations

d) Employability

Agency work contributes to employability

Source: American Staffing Association, 2014 Staffing Employee Survey

USA: nearly of 90% agency workers reports that agency work (staffing) made them more employable.

Temporary and contract work is a sought-after way to gain skills and work experience. Nearly 90% of temporary and contract employees reported that their staffing employment experience made them more employable by for example adding to their work skills, strengthen their resume or receiving on the job experience. This adds to the argument that agency work offers a stepping stone towards more opportunities on the labour market.

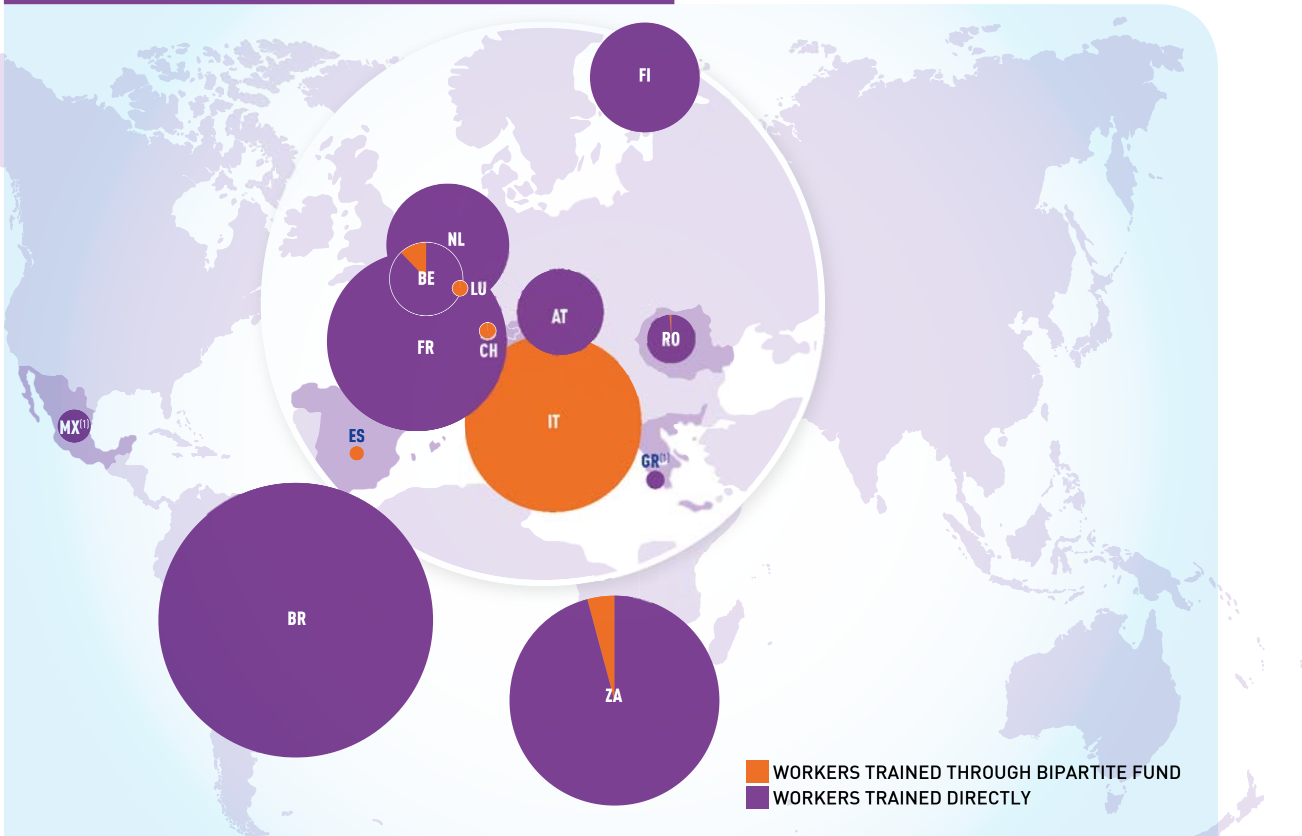
e) (life-long) training

1.5 million WORKERS trained

Agency work contributes to lifelong learning

In many countries agency workers receive formal training, either directly through the agency, or through bipartite funds set up by the agencies and the trade unions. This makes sure that agency workers get opportunities to keep developing themselves in order to take another step on the labour market. Being close to the labour market, employment and recruitment agencies are excellently suited to advice workers on the type of training to follow in order to enhance their employability. In 14 countries a total of almost 1.5 million workers is trained annually, while an amount of € 676 million is spent on training each year.

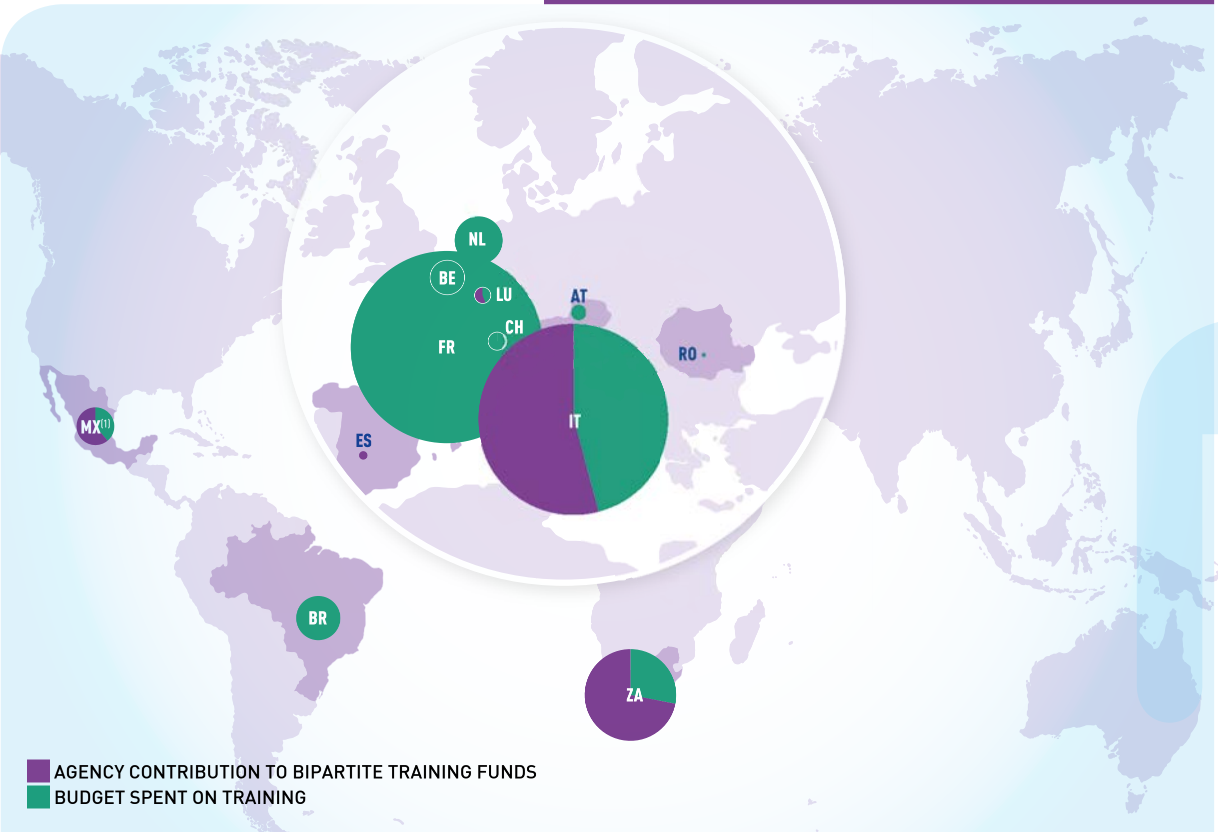
Number of workers trained directly and through bipartite funds



Source: Ciett national federations. (1): 2012 data.

€ 3,7 million SPENT ON *training* OF AGENCY WORKERS

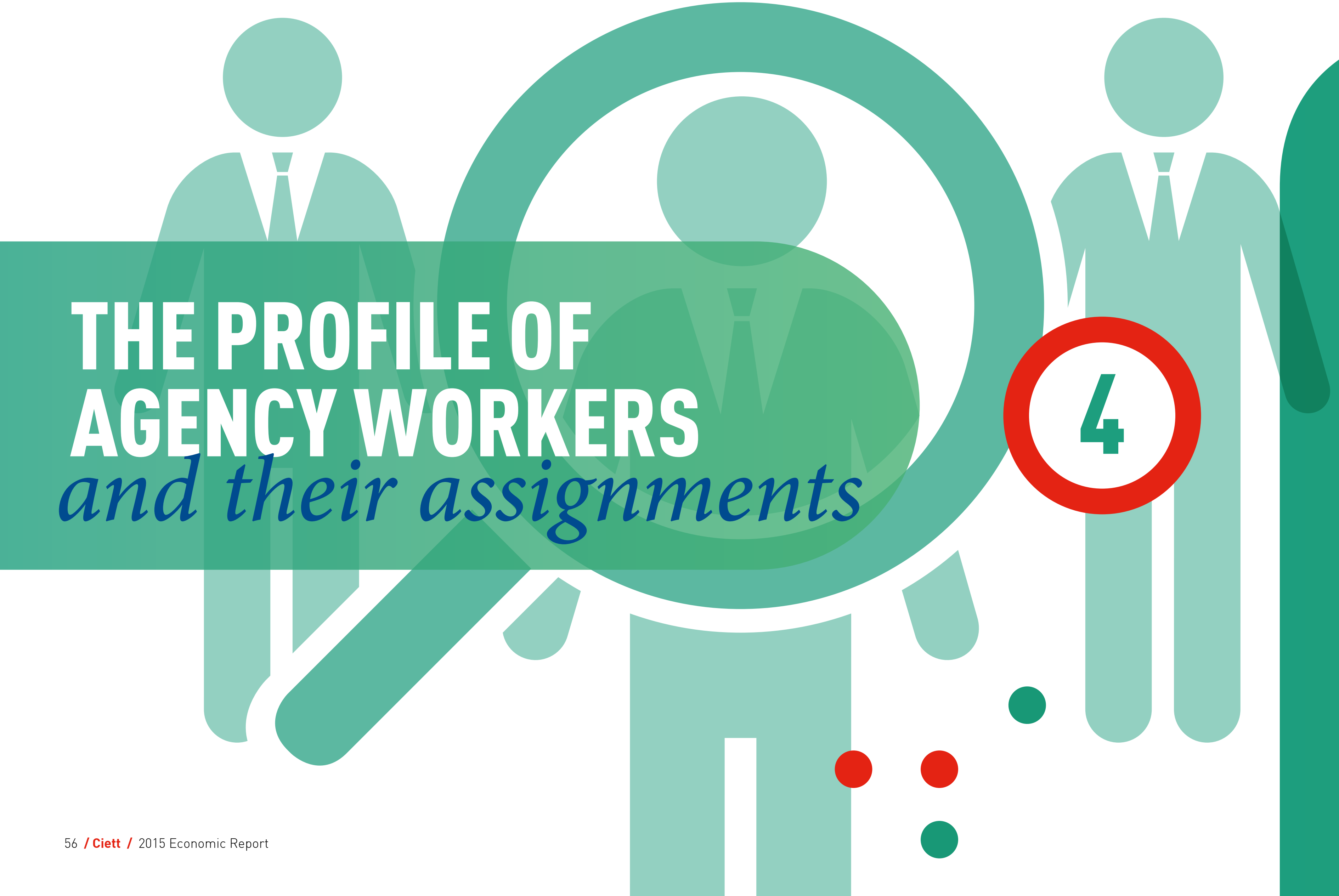
Budget spent on training for agency workers



Source: Ciett national federations. (1): 2012 data.

4

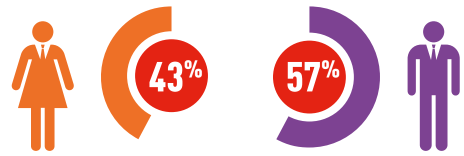
THE PROFILE OF AGENCY WORKERS *and their assignments*



The defining factor in the employment and recruitment industry is that there are always **THREE PARTIES INVOLVED: A WORKER, A USER COMPANY AND AN INTERMEDIARY.** *Still, the nature of agency work and the backgrounds of workers differ greatly. In this chapter we will look at some of the variables and see what the differences mean for the workers as well as our industry.*

> **"I [AM COMMITTED TO TAKE ACTION] TO ENCOURAGE THE CREATION OF THE QUALITY JOBS THAT EUROPE NEEDS SO MUCH IN THESE DIFFICULT TIMES. TEMPORARY AGENCY WORK CAN PLAY A POSITIVE ROLE HERE, IN PARTICULAR BY BRINGING FLEXIBILITY TO THE LABOUR MARKET."**
>
> Marianne Thyssen, European Commissioner for Employment, Social Affairs, Skills and Labour Mobility.

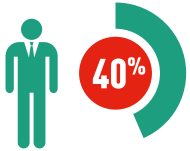
AVERAGE AGENCY WORKER *gender balance*



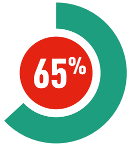
Gender balance varies greatly, depending on types of use of agency work

Gender balance among agency workers depends on many aspects, such as the socio-economic fabric of society, and economic history or tradition. In some countries, agency work is mostly done by women who might drop out of the labour market once they start families, or by mothers who want to take care of their family and want a flexible job next to that. Typically, countries where agency workers are mostly employed in the services sector tend to have more female agency workers, while countries where agency work is used more in the construction or manufacturing sectors have more male agency workers.

Agency workers gender balance



Under 25
WORLDWIDE



Under 30
WORLDWIDE

(1) Source: Ciett national federations 2011.
Germany: Categories are <20; 20-29; 30-39; 40-49; ≥50. Hungary & Poland : Categories are: <25; 25-49; >50.

Agency workers tend to be young

In most countries, the majority of agency workers is under 30. Worldwide, on average 66%. India has only 1% of workers over 30. In South Africa it's only 9% and in China 23%. In these countries, it is clear that agency work is an excellent stepping stone onto the labour market for young people. On average, more established markets such as Japan, the USA, Italy, France and Luxembourg have more older workers. In these countries, agency work is generally considered to be a good and viable alternative to other types of employment and seen as providing a stepping stone to the labour market from any situation. The difference between age profiles also correlates with different motivations that people have to work as an agency worker: to earn some money during a study, young parents who work only part time, or specialized professionals who are looking for the best place to market their skills.

26% COMPLETED HIGHER EDUCATION

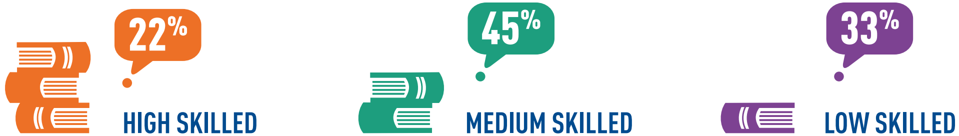
54% COMPLETED SECONDARY EDUCATION

20% DID NOT COMPLETE SECONDARY EDUCATION

80% of agency workers completed secondary education or more

On average, 26% of agency workers completed higher education. There are significant differences between countries though, with some markets mostly based on higher educated workers, and some mostly on typical blue collar work. The reason that India has by far the highest number of highly educated workers probably has to do with the fact that lower skilled labour in India is often still taking place as undeclared work. Countries with relative large shares of low skilled workers such as the Czech Republic, Luxembourg or Macedonia tend to have a large part of agency work done in construction or manufacturing (see page 63).

Level of education of agency workers



Level of skills required by agency work assignments

Two thirds of agency work is medium to high skilled work

As can be seen on this page, agency work can clearly play an important role in helping both low- and high-skilled workers to get valuable experiences on the labour market.

Average length OF AGENCY WORK ASSIGNMENTS

77% of agency work assignments are over 1 month

On average, only 25% of assignments are under one month duration, while 48% is over three months. Naturally, an agency worker can do multiple consecutive assignments, meaning that the length of assignment does not necessarily say anything about the total length of employment of a particular worker through an agency. There are countries where it is normal for agency workers to have an open-ended contract with the agency.

Average length of agency work assignments

Source: Ciett national federations

Agency work employment by sector

Most agency workers employed in services and manufacturing

In most countries, agency workers primarily work either in services (on average 37%) and manufacturing (32%). Luxembourg, Norway, Australia and France stand out with a relative high percentage of people in construction. Many Central and Eastern European countries, including Estonia, Poland, Hungary and the Czech republic have a large part of agency work taking place in manufacturing. Agriculture is among the main sectors for agency workers in Spain, while Australia and Brazil also have above average numbers of agency workers in agriculture.

Note: in some countries, a large proportion of agency work is classified as "other", relating to different data collection methodologies. This distorts the picture.

Agency work equally used by SME's and bigger companies

Companies of all sizes use agency workers. About 48% of agency workers are employed by companies with less than 100 employees, the other 52% of agency workers works in companies that have over 100 employees. Companies with less then 10 employees hire approximately 9% of all agency workers. Although significant differences exist between countries, this does show that agency work offers an effective way to manage part of the workforce for all sorts of companies.

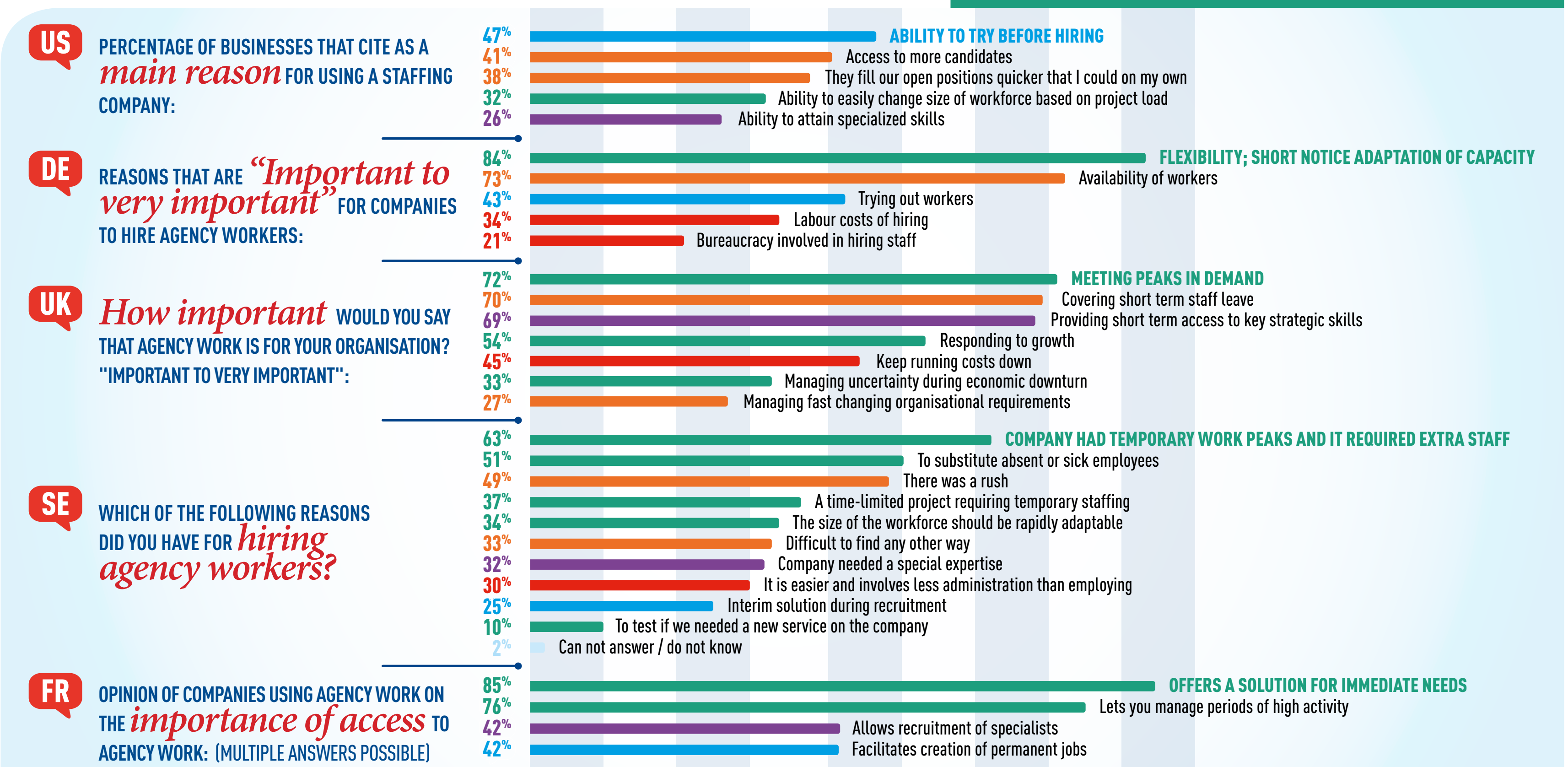
Size of companies using agency work

Source: Ciett national federations

REASONS RELATING TO:

- HIRING PERMANENT CANDIDATES
- AVAILABILITY OF CANDIDATES THROUGH AGENCY WORK
- ADAPTABILITY OF THE WORKFORCE THROUGH AGENCY WORK
- WORKERS SKILLS
- COSTS AND EASE OF HIRING RELATING TO AGENCY WORK

Reasons for hiring agency workers

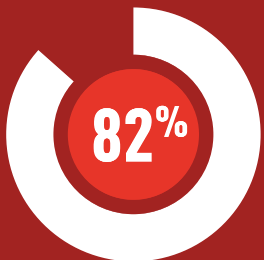


Sources: US: CareerBuilder and Inavero Opportunities in Staffing 2014 report. - DE: Zeitarbeit in Deutschland –Treiber für Flexibilität und Wachstum, IW Consult GmbH, 2011. - UK: REC JobsOutlook 2014 aggregate data January-October. - SE: Personalinhyrningen I Sverige, En studie av 600 arbetsgivares anlitande av bemanningsföretag 2012, Bemanningsföretagen (Swedish Staffing Association), 2012. - FR: Prism'Emploi, Rapport Économique & Social 2013.

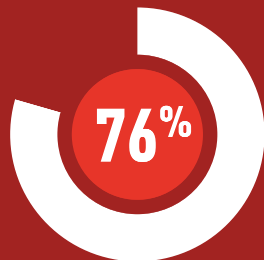
5

Satisfaction & motivation of AGENCY WORKERS

In the previous chapter we saw how people working through an agency may have very different backgrounds. That also means that they have different reasons to choose agency work. This chapter will highlight the personal motivations as well as worker satisfaction of those involved in agency work. As an industry, we can pride ourselves on the fact that **PEOPLE TEND TO BE SATISFIED WITH THEIR AGENCY JOBS,** *and that they would recommend it to their family and friends.*



OF WORKERS ARE SATISFIED TO *very satisfied*

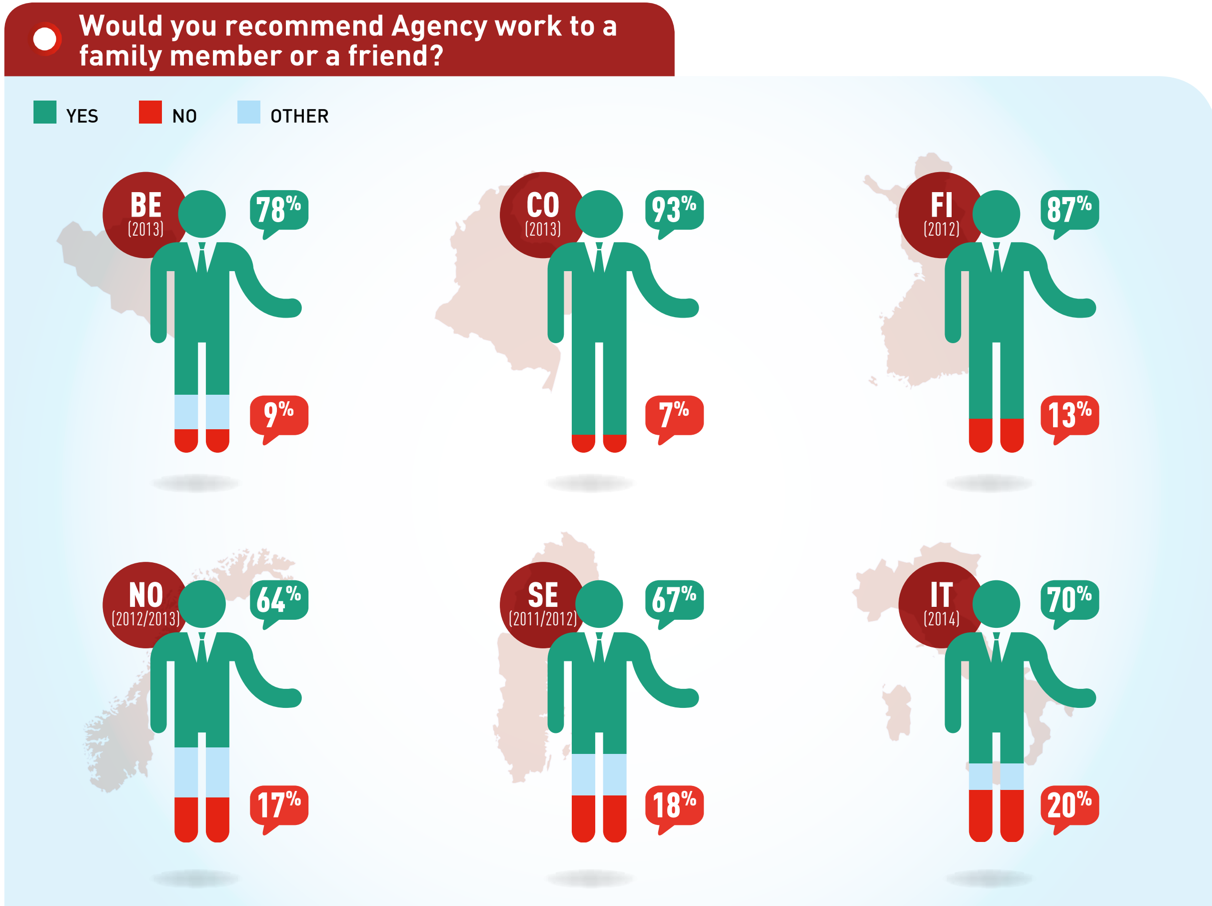


OF WORKERS *would recommend* **AGENCY WORK**

Vast majority of workers would recommend agency work to their families or friends

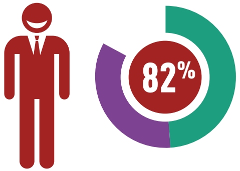
Research from a range of countries shows that agency workers are on average very satisfied with their work. On average, 82% of agency workers report that they are satisfied or very satisfied, and 76% would recommend agency work to their family or friends. This clearly shows that working through an agency is a conscious and deliberate choice for a vast majority of the workers.

Also, results from Italy show that when people are acquainted with agency work they are more likely to recommend it, mirroring the same bias in companies using agency work who are more positive about it than those who have never done so (see page 46). Clearly, the experience of working as an agency worker or using agency work for your business removes an unjustified negative image.



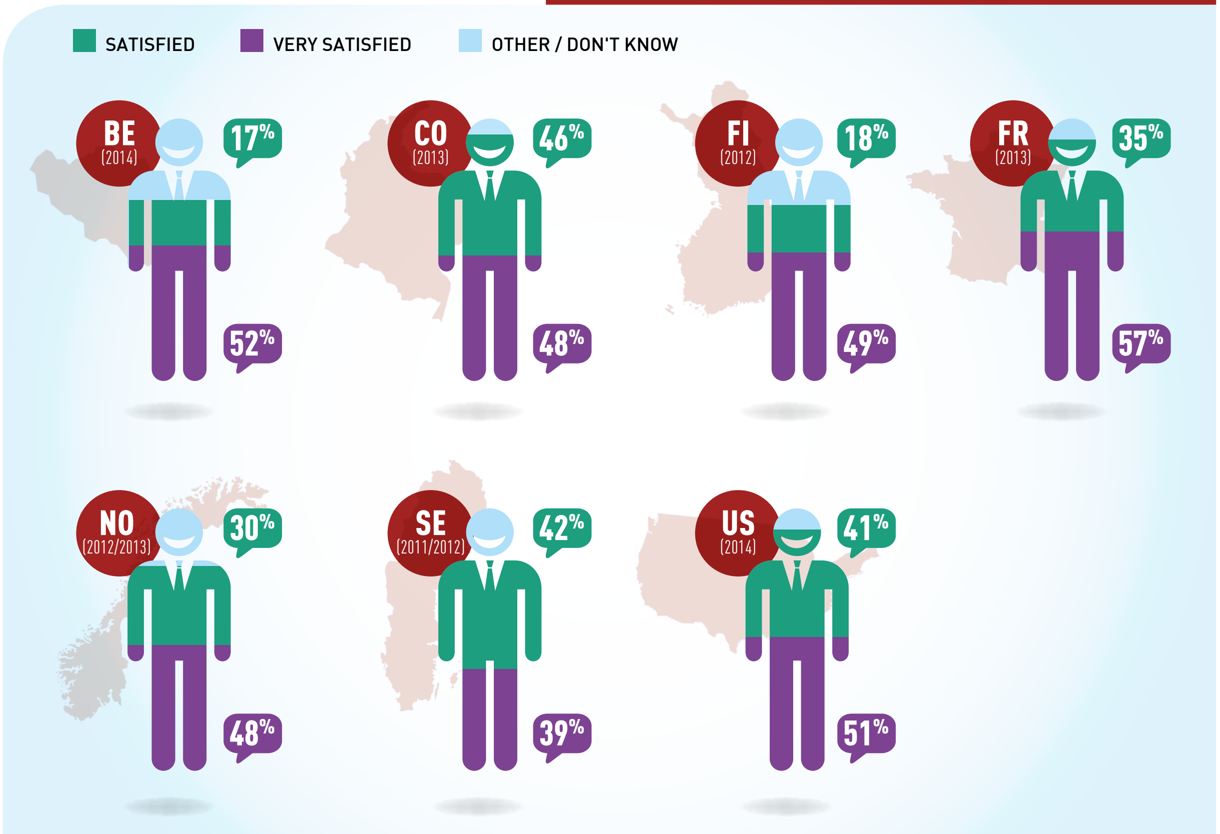
Source: Ciett national federation members

Note: Italy: Surely yes: 20%, probably yes 50%, probably no 14%, surely no 6%.



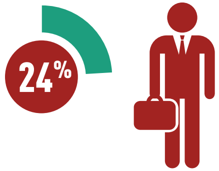
49% OF WORKERS ARE SATISFIED, 33% ARE *very satisfied*

Percentage of agency workers who are satisfied with their work



Source: Ciett national federation members

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

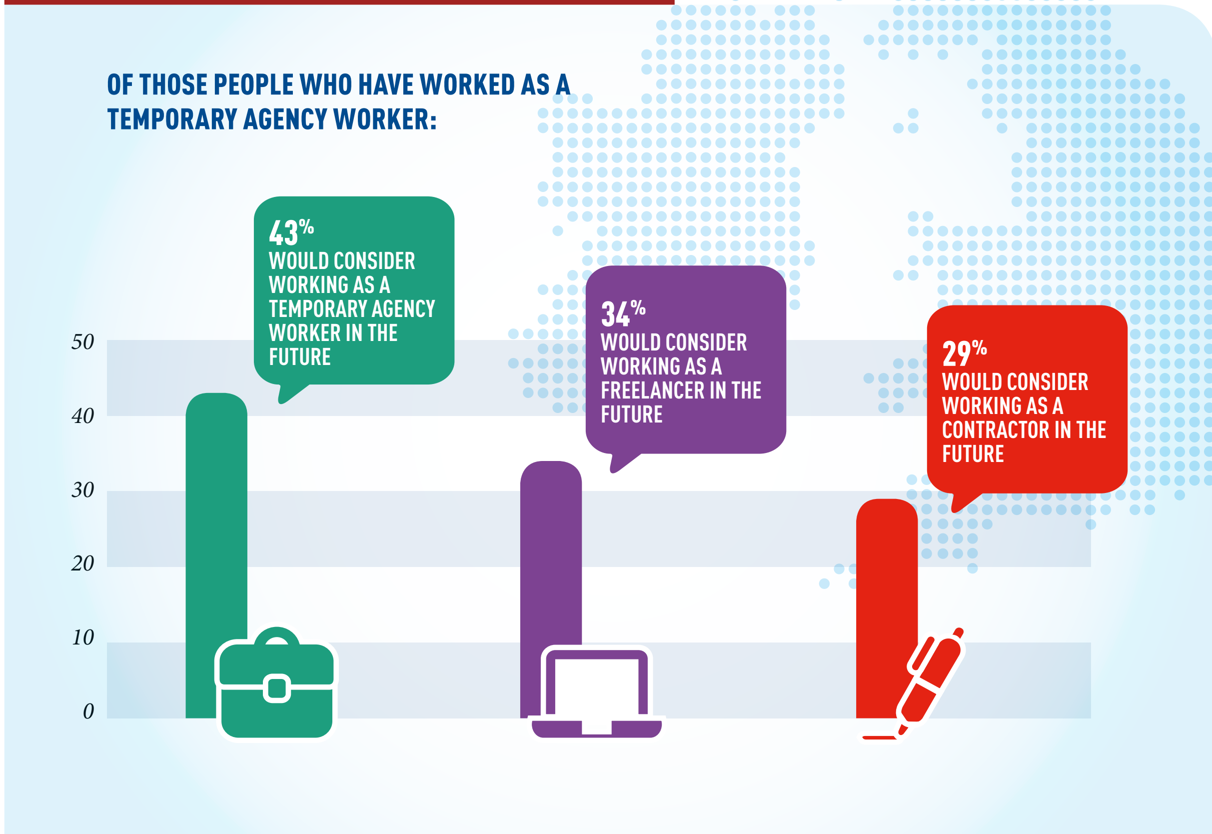


OF THE BRITISH POPULATION *has worked* AS A TEMPORARY AGENCY WORKER AT SOME POINT IN THEIR WORKING LIFE

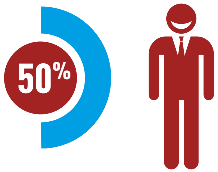
UK: Agency work is now a well accepted form of work for many people

In the UK, 43% of people who had worked as an agency worker before would consider working as a temporary agency worker again in the future. Also, almost a quarter of the entire British population has at some point in their lives worked as an agency worker. Together, this clearly shows that agency work is now a well established and regular form of work. People with very diverse backgrounds and very different careers have used agency work as a way to gain easy access to the labour market, moving from education to work, from unemployment to work or from one job to another.

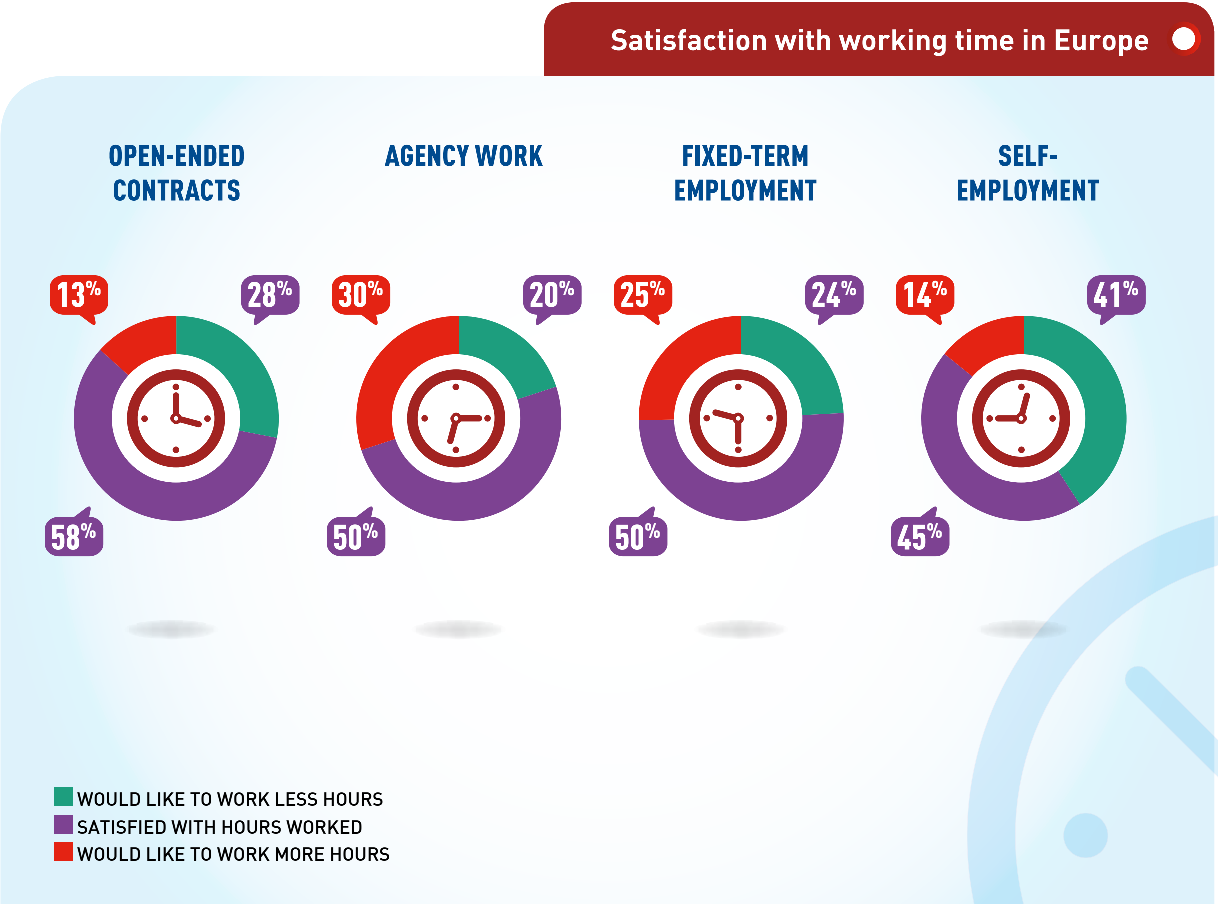
UK: Choices regarding flexible work



Source: Flex appeal – why freelancers, contractors and agency workers choose to work this way. Recruitment & Employment Confederation, 2014.



OF AGENCY WORKERS *is satisfied* WITH WORKING HOURS



Average hours of work per week: Self-employed (45h); Open-ended (37.6h); Fixed-term (35.3h) and agency work (34.4h)
Source: IDEA Consult based on microdata from Eurofound EWCS 2010 (microdata received from UK Data)

Agency workers satisfied with working hours

50% of agency workers is satisfied with the number of hours they work in a week, which is more than for self-employed and equal to that in fixed term employment. Agency workers have on average shorter working weeks than any other form of employment, and about 30% of them would like to work more hours. This is slightly more than for fixed-term employment.

Profile OF AGENCY WORKERS: CAREER STARTERS · YOUNG PROFESSIONALS

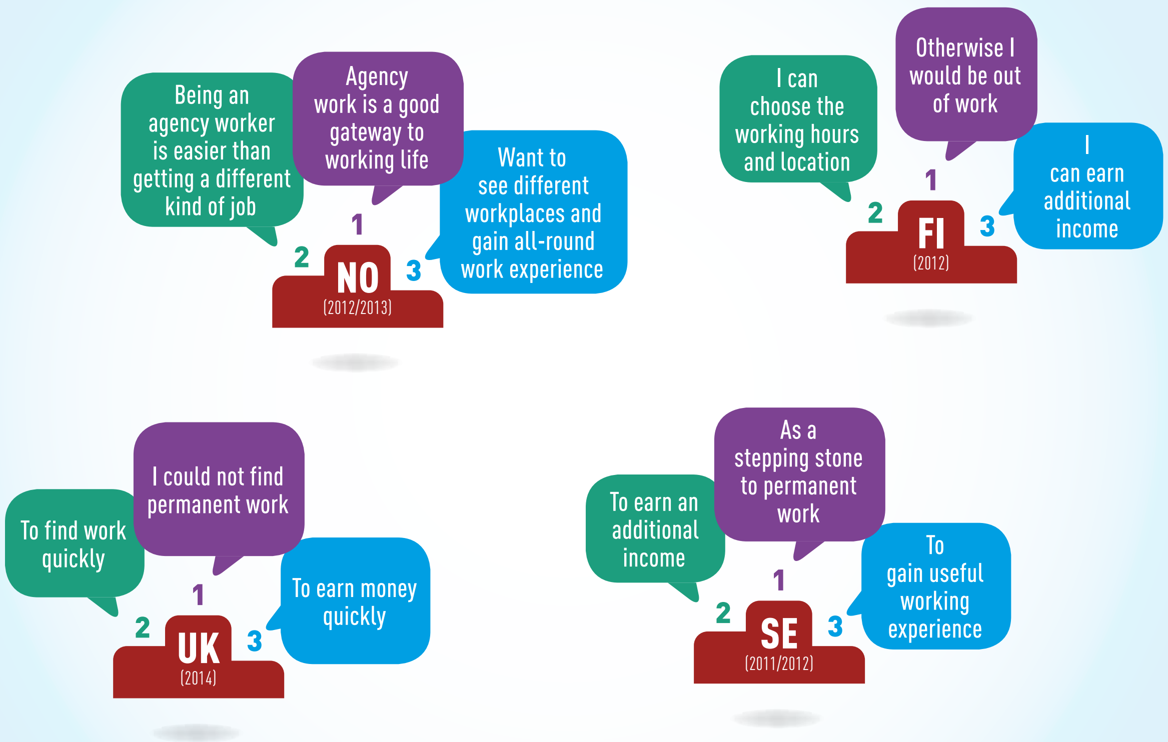
Agency workers have different profiles and different reasons to choose agency work

The wide range of reasons for workers to choose agency work can be classified in 5 general profiles. These may help understand the motivations of agency workers ...better. Each of the reasons may apply to one or several of these profiles:

- **Career starters**
  to find a permanent job
- **Young professionals**
  looking for valuable experience
- **Flex professionals**
  using agency work to find assignments, not necessarily looking for a permanent job
- **Extra earners**
  looking for a source of additional income.
- **The re-launchers**
  using agency work to fill a gap in their career, moving from one job or sector to another.

Top 3 reasons for choosing agency work

FLEX PROFESSIONALS **EXTRA EARNERS** **RE-LAUNCHERS**



Source: Ciett national federation members

Note: the profiles are adapted from a survey among agency workers done by IDEA Consult for Federgon: Enquete uitzendkrachten 2013. January 2014. (available in French & Dutch on www.federgon.be).

ANNEXES

ABOUT CIETT

● *As the international confederation of private employment services, Ciett is the authoritative voice* **REPRESENTING THE INTERESTS OF THE AGENCY WORK INDUSTRY** *across the world.*

● *Founded in 1967, Ciett consists of* **50 NATIONAL FEDERATIONS** *of private employment agencies and eight of the largest staffing companies worldwide: Adecco, GI Group, Kelly Services, ManpowerGroup, Randstad, Recruit, Trenkwalder and USG People.*

● *Its members provide* **61 MILLION WORKERS** *with access to the labour market each year, 40 million of whom work in agency work. Worldwide,* **OVER 1.6 MILLION PEOPLE WORK IN AN EMPLOYMENT OR RECRUITMENT AGENCY.**

● *Ciett's main objective is to help its members conduct their businesses in a* **LEGAL AND REGULATORY ENVIRONMENT** *that is positive and supportive.*

International Confederation of Private Employment Services

Ciett is divided into six regional organisations: Africa/Near East, Northern Asia, Southern Asia, North America, South America [CLETT&A], and Europe [Eurociett].

THE WAY TO WORK; A JOB FOR EVERY PERSON, A PERSON FOR EVERY JOB

is the unified vision for the global employment & recruitment industry. It reflects the industry's unique position in building better labour markets and providing work opportunities and hope to millions of people every day.

CIETT MEMBERS

NORTH AMERICA
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Mexico
USA

SOUTH AMERICA
Argentina
Brazil
Chile
Colombia
Perú

AFRICA
Morocco
South Africa
Zambia

EUROPE
Austria
Belgium
Bulgaria
Czech Republic
Denmark
Estonia
Finland
France
Germany
Greece
Hungary
Ireland
Italy
Latvia
Lithuania
Luxembourg
Macedonia
Netherlands
Norway
Poland
Portugal
Romania
Russia
Slovakia
Slovenia
Spain
Sweden
Switzerland
Turkey
UK

NORTHERN ASIA
China
Japan
South Korea

SOUTHERN ASIA
Australia
India
Indonesia
New Zealand
Vietnam
The Philippines

ciett

International Confederation of
Private Employment Services

GLOSSARY OF USED TERMS & ACRONYMS

Agency work
AW 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"

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

Outplacement
A service to guide a terminated employee of a company to a satisfactory new position or career through the provision of short- or long-term counseling and support services, on a group or individual basis, most often paid for by the terminating employer. (Source: Staffing Industry Analysts)

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 & recruitment industry
Agency work is usually one of several other HR services provided by recruitment and employment agencies, along with permanent recruitment, outplacement, training, executive search, skills assessments and more. The broad range of these services are called private employment services. The 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 services such as accounting, security or cleaning.

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.

Search & selection
Also called (permanent) 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.

DATA GATHERING / METHODOLOGY

The vast majority of graphs and charts in this economic report were compiled using the data that Ciett members report to the Ciett secretariat in an annual data gathering exercise. While the Ciett secretariat will try its utmost to verify the data, ultimately Ciett members remain responsible for the correctness of the data. Sometimes these members have their own tools to collect data, sometimes they rely for example on government statistics.

In its data collection Ciett tries as much as possible to work with one set of definitions (e.g. what should be counted as agency work, how to measure the number of FTE's etc.). Whenever definitions are different, this is indicated in a footnote on the page. See Annex III for definitions.

If a specific number is not available for a country, we may use results from previous years to be able to present a broader picture. This is always indicated in a footnote. If a country is not included in a graph (e.g. on permanent recruitment), mostly it does not mean there is no incidence (of permanent recruitment in this case), but rather that there is no data available.

The graphs and charts in this economic report may – for simplification purposes – not always show all the available data. Researchers or journalists who are interested in underlying data can contact the Ciett communications & economic affairs adviser Menno Bart at menno.bart@ciett.org.

LIST OF *selected external* RESOURCES

Flex appeal – why freelancers, contractors and agency workers choose to work this way. Recruitment & Employment Confederation, 2014. https://www.rec.uk.com/__data/assets/pdf_file/0006/155562/Flex-Appeal-2014.pdf

Recruitment Industry Trends 2013/14 (REC). https://www.rec.uk.com/news-and-policy/research/recruitment-industry-trends-2013-2014.

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Regards Croisés sur l'interim. Observatoire des métiers et de l'emploi, 2013. http://www.observatoire-travail-temporaire.com/index.php#publication

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Statistics Japan, statistics bureau, ministry of internal affairs & communications. Employee by age group & type of employment. Dowloaded on 30 October 2014. http://www.stat.go.jp/data/roudou/longtime/zuhyou/lt01-b20.xls

Enquete uitzendkrachten 2013. January 2014. IDEA consult at the request of Federgon (available in French & Dutch). http://www.federgon.be/uitzendarbeid/profiel-van-de-uitzendkrachten-2014/profiel-van-de-uitzendkrachten-2014/

Prism'Emploi Rapport Économique & Social 2013. http://www.prismemploi.eu/magazine/rapport-annuel-2013/

COUNTRY CODES [1]

ARGENTINA	AR	MACEDONIA	MK
AUSTRALIA	AU	MEXICO	MX
AUSTRIA	AT	MOROCCO	MA
BELGIUM	BE	NEPAL	NP
BRAZIL	BR	NETHERLANDS	NL
BULGARIA	BG	NEW ZEALAND	NZ
CANADA	CA	NORWAY	NO
CHILE	CL	PERÚ	PE
CHINA	CN	POLAND	PL
COLOMBIA	CO	PORTUGAL	PT
CZECH REPUBLIC	CZ	ROMANIA	RO
DENMARK	DK	RUSSIA	RU
ESTONIA	EE	SINGAPORE	SG
FINLAND	FI	SLOVAKIA	SK
FRANCE	FR	SLOVENIA	SI
GERMANY	DE	SOUTH AFRICA	ZA
GREECE	GR	SOUTH KOREA	KR
HUNGARY	HU	SPAIN	ES
INDIA	IN	SWEDEN	SE
IRELAND	IE	SWITZERLAND	CH
ITALY	IT	TURKEY	TR
JAPAN	JP	UK	UK
LATVIA	LV	USA	US
LITHUANIA	LT	ZAMBIA	ZM
LUXEMBOURG	LU		

(1) The International Organisation for Standardisation ISO: the international standard for country codes ISO 3166

A JOB FOR EVERY PERSON A PERSON FOR EVERY JOB

THE WAY TO WORK

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