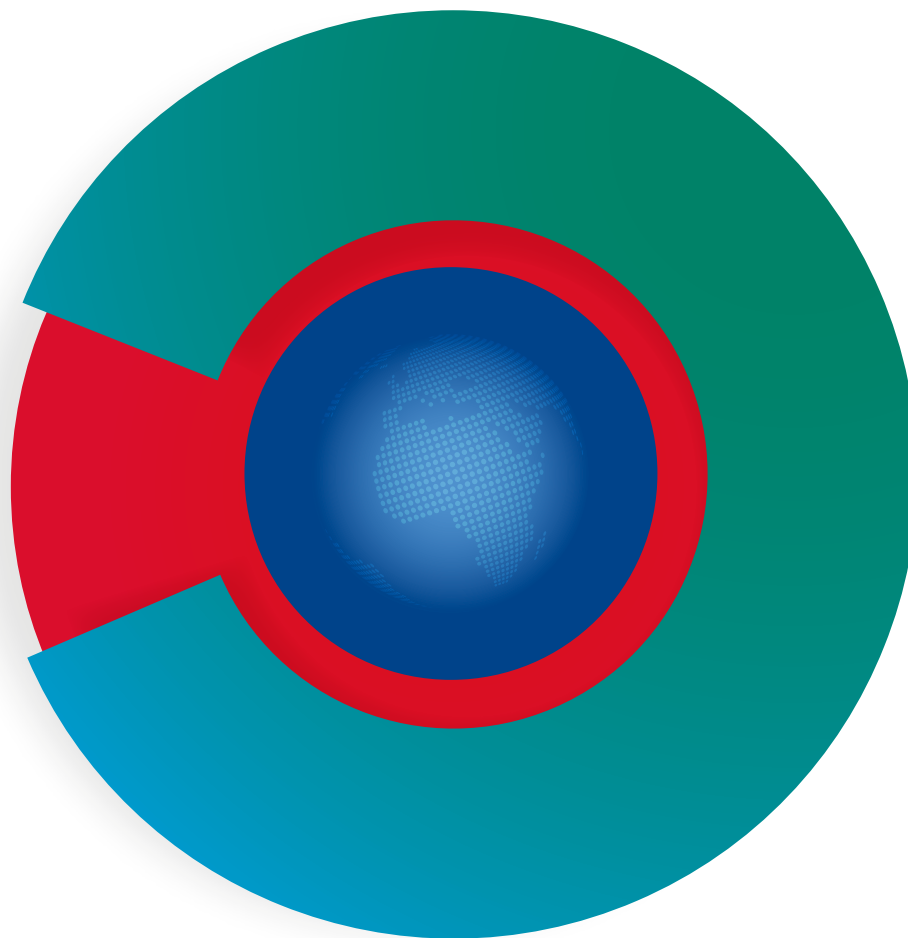




International Confederation of
Private Employment Agencies

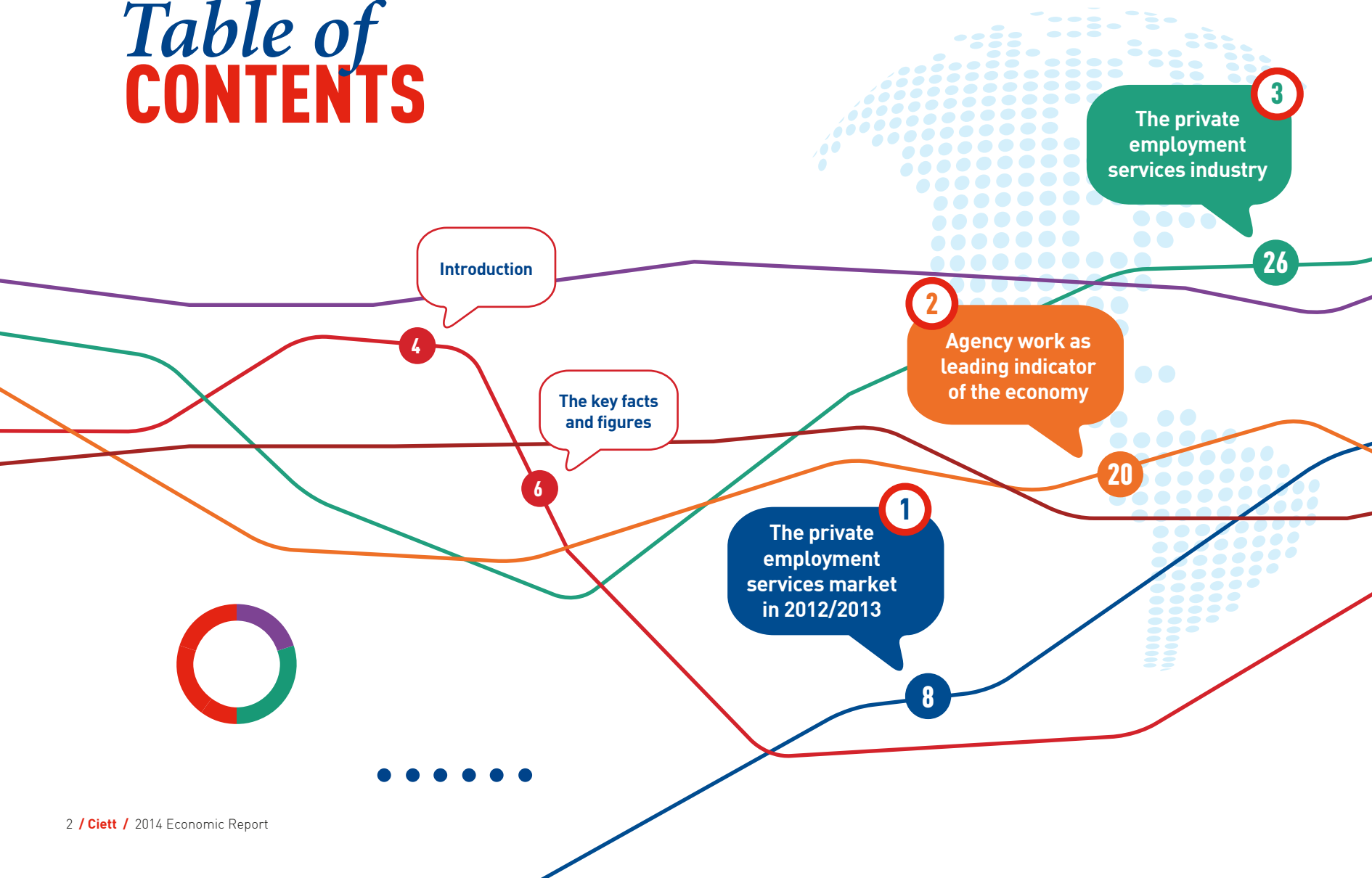


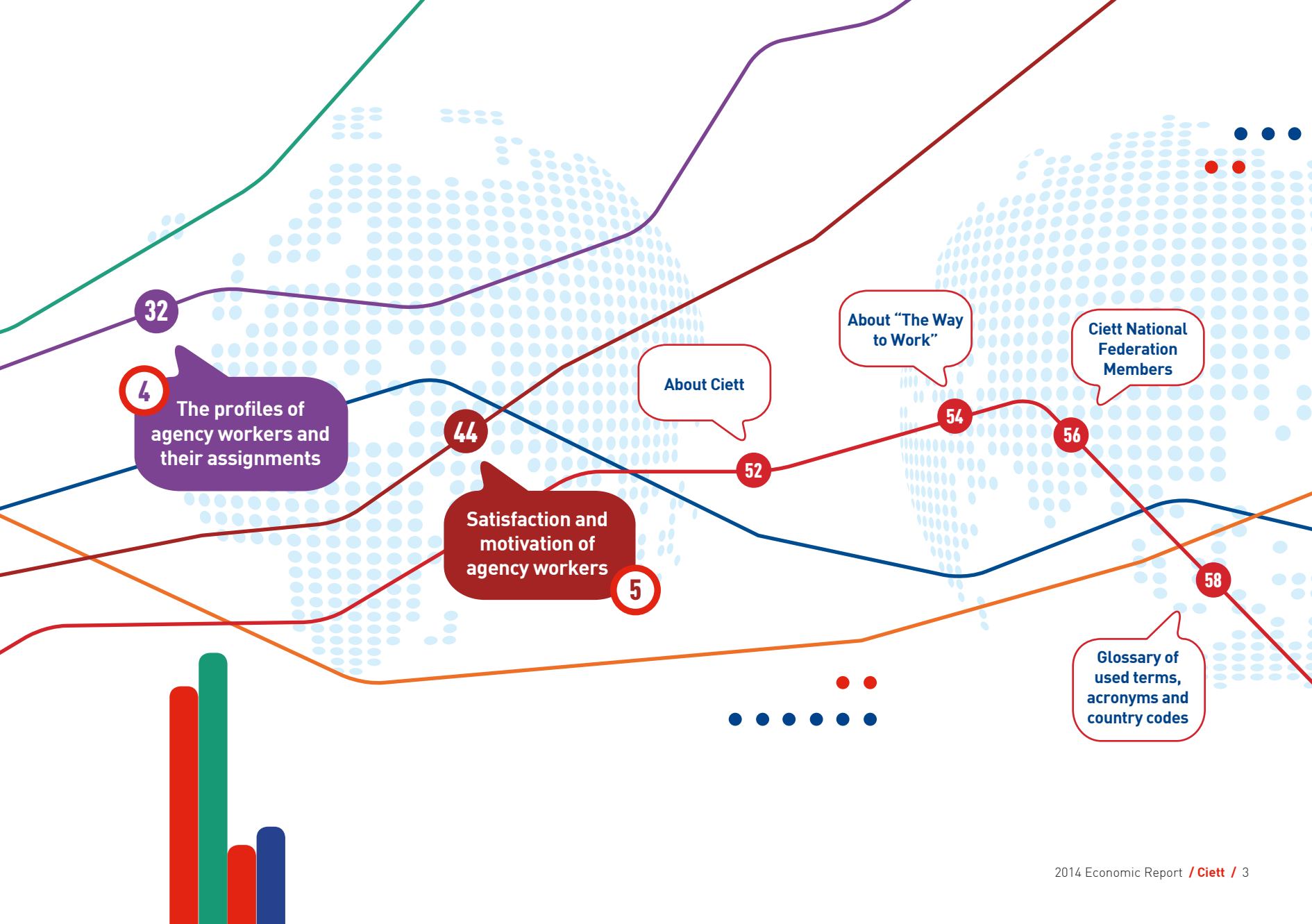
Economic Report

2014 Edition

(Based on data of 2012/2013)

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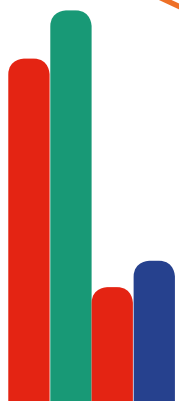
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INTRODUCTION

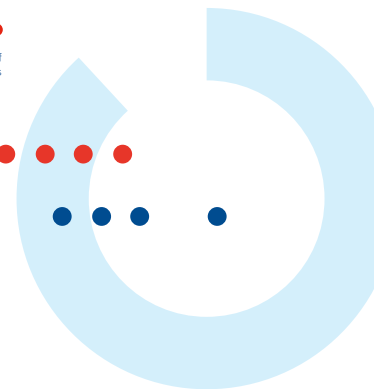
Dear reader,

It is our pleasure to present you with the 2014 annual Ciett economic report. This report will provide you with a comprehensive overview of the agency work industry around the world. It combines some key data that was available from 2013 with more in depth data from 2012.

As the International Confederation of Private Employment Services, Ciett represents a sector that is today the Way to Work for more than 36 million workers around the world. Since its establishment in 1967 Ciett has been providing data about the industry, while this is the 7th economic report. The picture that emerges over the years is one of a robust industry that clearly relates to market volatility. Even so much so, that agency work is considered to be a leading economic indicator.

Considering this, it is promising that the US Staffing Employment Index is at its highest point in the past five years, just as the number of agency workers in Japan, while the European Agency Work Business Indicator has also started an upward trajectory. Together these three markets represent 82% of the worldwide market.

These cautious signs of economic recovery are welcome news not only for our industry, but also for millions of workers and jobseekers around the world. Agency work has proven to be a strong enabler of labour market transitions – from unemployment into work, and from temporary work into long lasting careers. Linked to this, Ciett and its members presented in 2011 the Way to Work – A job for every person and a person for every job. The Way to Work consists of 5 global pledges by the private employment services around the world, over the course of five years (2011-2016) to:



*Support **280 MILLION PEOPLE** in their job life*

*Help **75 MILLION YOUNG PEOPLE** enter the labour market*

***UP-SKILL 65 MILLION PEOPLE**, giving them more work choices*

*Create **18 MILLION MORE JOBS***

***SERVE 13 MILLION COMPANIES** with the right talents to succeed*

You can read more about the Way to Work and our pledges on pages 54-55.

We hope you enjoy this report in its entirety, but with befitting pride, we would like to draw your special attention to chapter 5, digging into satisfaction and motivation of agency workers. After all, what is more rewarding to see than that on average 80% of workers would recommend agency work to their family and friends?

Sincerely,

Fred van Haasteren, Ciett President

Annemarie Muntz, Eurociett President

Denis Pennel, Ciett & Eurociett Managing Director



KEY FACTS & FIGURES

AGENCY WORK *in* 2012



11.5
million jobs

*In full-time
equivalent*

For more information, see chapter 1

€ 299.3 Bn

GLOBAL ANNUAL SALES REVENUE

For more information, see chapter 3

US **28.9%**

JP **16.6%**

EUR **36.5%**

SHARE OF GLOBAL MARKET

For more information, see chapter 3

137,300 *Agencies*

203,500 *Branches*

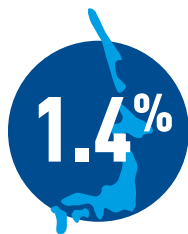
624,500 *Internal Staff*

For more information, see chapter 3

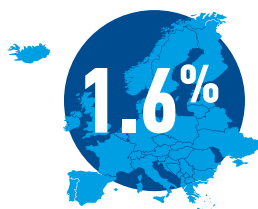
PENETRATION RATES



USA



JAPAN

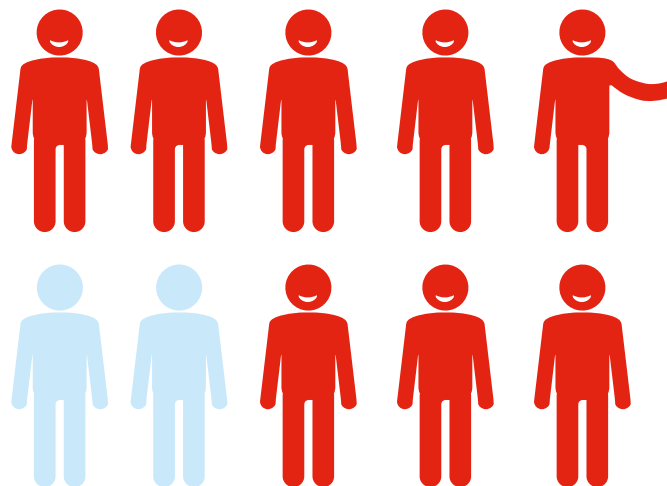


EUROPE

For more information, see chapter 1

80%

would
RECOMMEND AGENCY WORK
to family or friends
(avg. over 6 countries surveyed)



For more information, see chapter 5



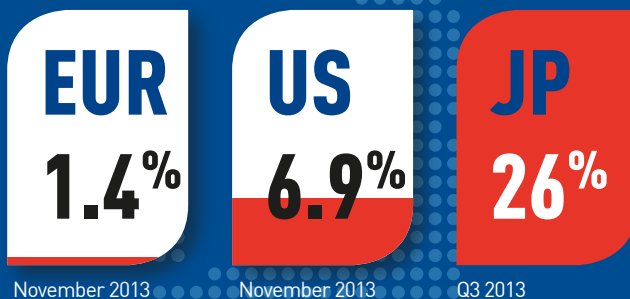
THE PRIVATE EMPLOYMENT SERVICES MARKET

developments in 2012/2013

This chapter combines some recent (2013) figures with more in depth data over the year 2012.

*This combination shows that just as the global economy, the private employment services industry has been through some rough times, but that **IN 2013, THE BIGGEST MARKETS – THE USA, EUROPE AND JAPAN – ALL SHOWED CAUTIOUS SIGNS OF RECOVERY.***

Y-O-Y GROWTH



PENETRATION RATES



1 THE PRIVATE EMPLOYMENT SERVICES MARKET DEVELOPMENTS IN 2012/2013

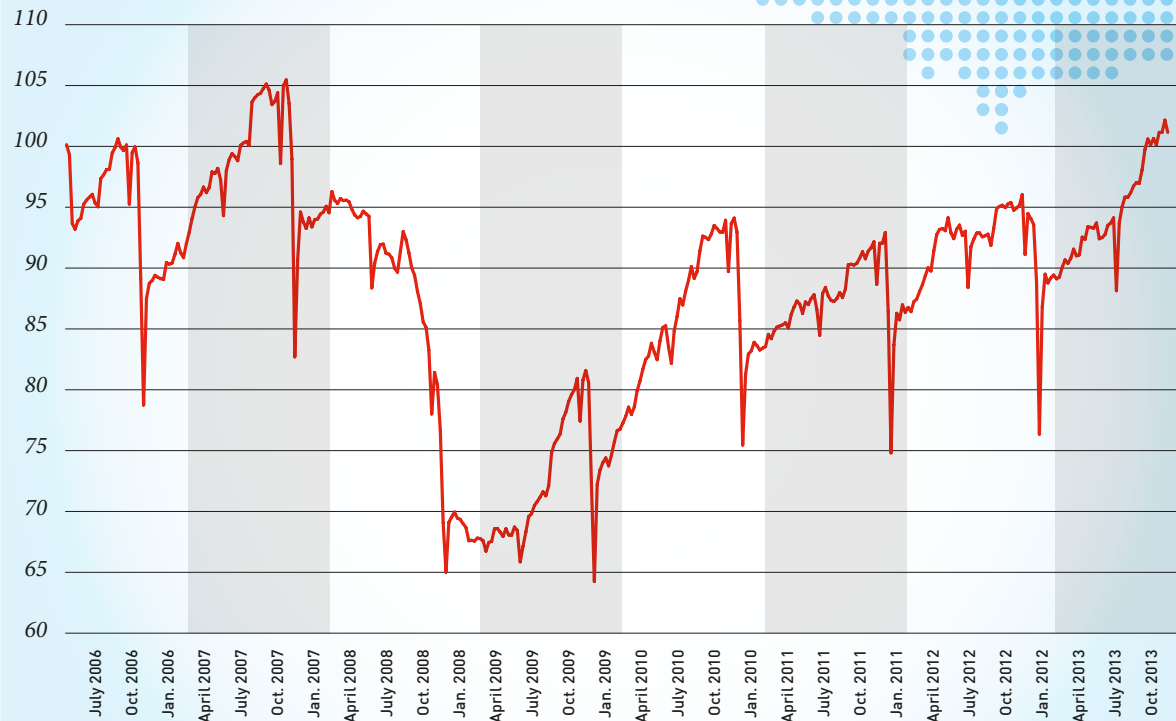
USA market grows in 2013

The US Staffing Employment Index was set at 100 in 2006. The agency work sector reached 102 in November of 2013, which is its highest position in six years. Exactly 12 months before that, the index stood at 95. Staffing had grown 6.9% y-o-y in November 2013. The index has not yet reached the same level as before the 2008 crisis though.

Employing on average over 2.9 million agency workers each business day in 2012, the USA remains the single biggest market for agency work around the world.

6.9% Y-O-Y
growth
IN NOVEMBER 2013

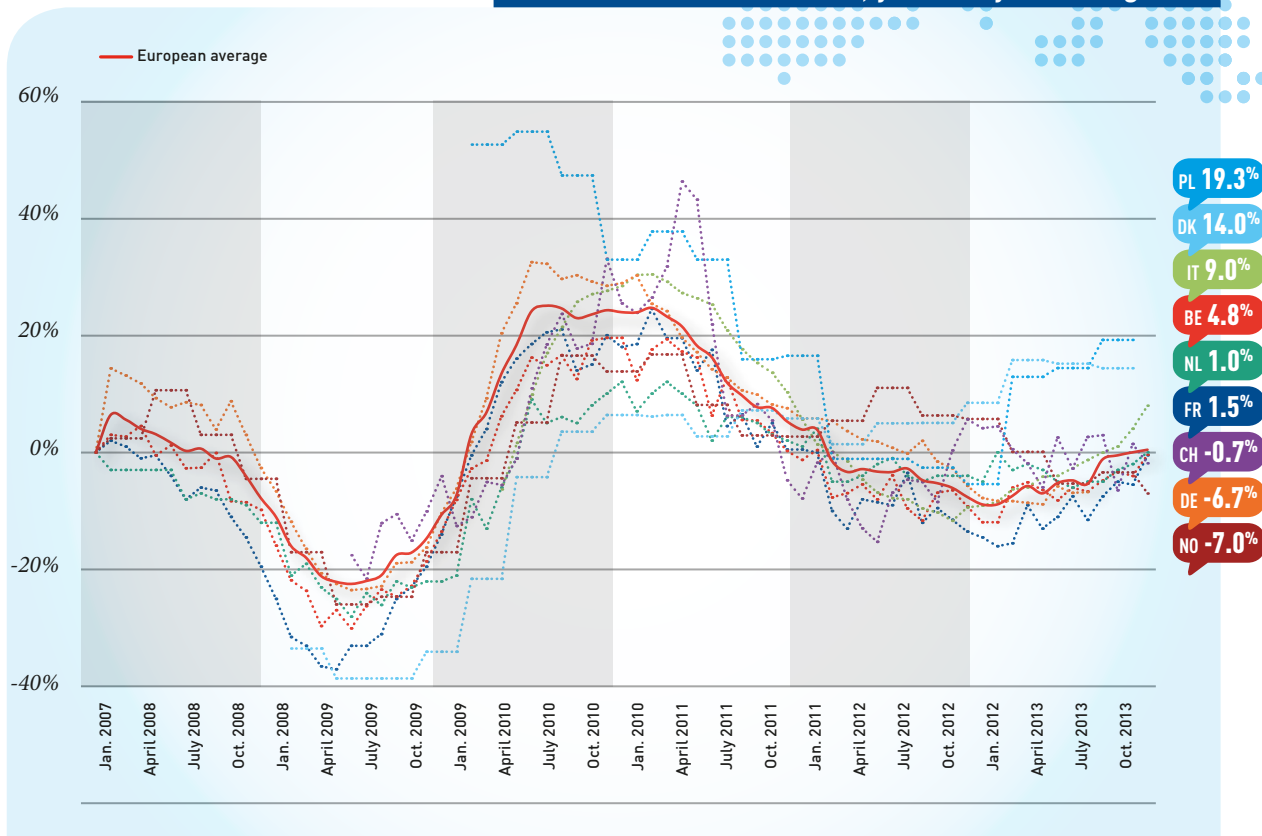
USA: US Staffing Employment Index
(Set at 100 on 6/12/2006)



Source: American Staffing Association

1.4% Y-O-Y growth IN NOVEMBER 2013

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



European market shows cautious upward trend in 2013

In Europe, the monthly Agency Work Business Indicator, showing the year on year growth in the number of hours worked in a range of European countries, shows an upward trend. In October 2013 the first positive growth since December 2011 was recorded at 0.6%; in November this accelerated to 1.4% growth.

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

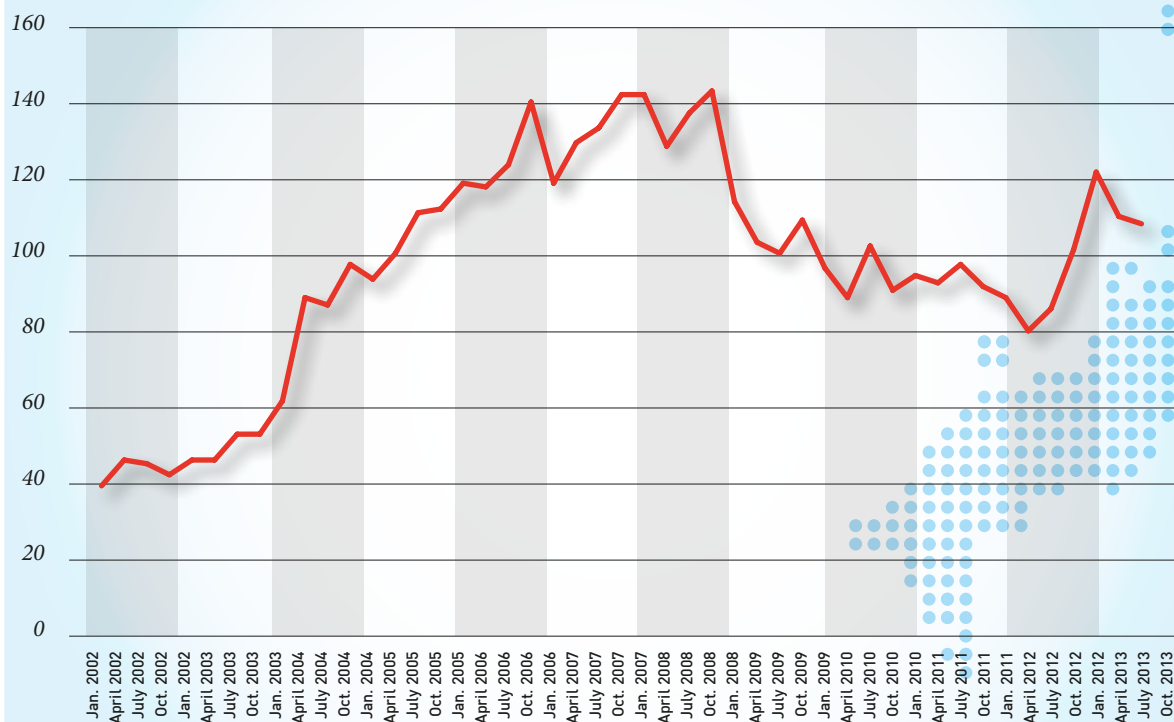
In 2013 Japanese market hits record high since 2008

The absolute number of agency workers in Japan has reached 1.1 mln in Q3 of 2013, a growth of 26% compared to Q3 2012. Q1 of 2013 showed a record high with 1.24 mln 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 fifth market in the world. By turnover however, Japan ranks second with 17% of total annual sales revenue.

Please note that for comparison an index (USA), year on year growth (European Agency Work Business Indicator) and absolute numbers (Japan) are three different indicators, which cannot be compared one on one.

The Japanese ministry of Health, Labor and Welfare provides alternative figures to the Japanese ministry of Public Management, Home Affairs, Post and Telecommunications. The latest available figures there are for 2011: 1,321,892 (FTE).

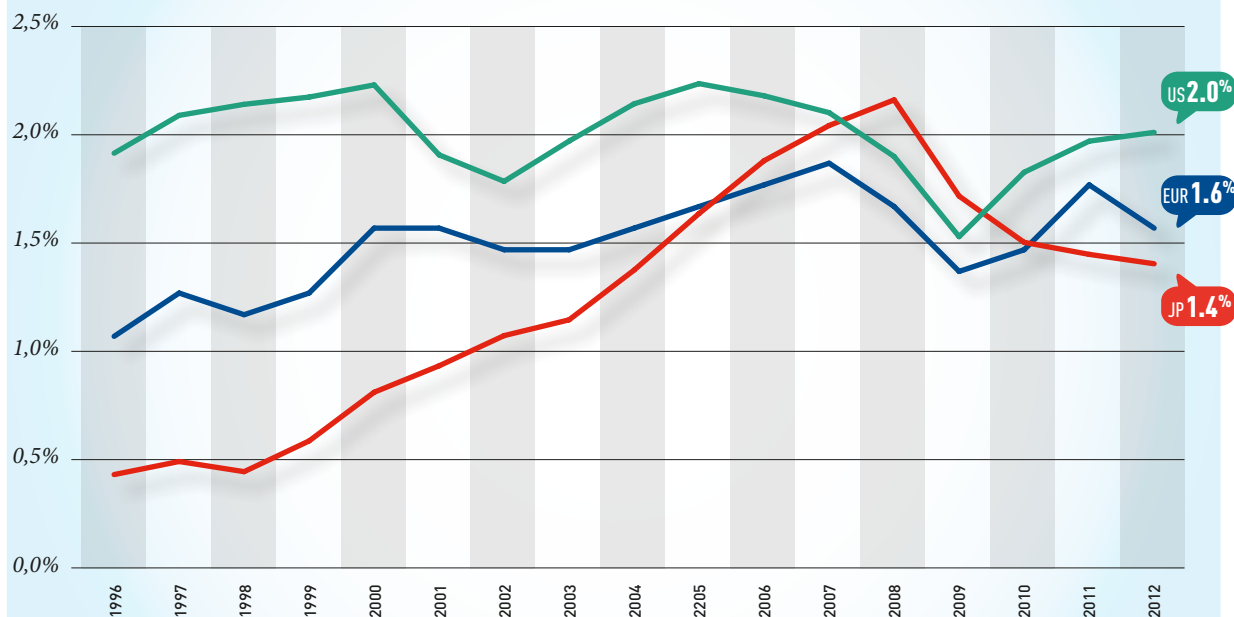
**Japan: Number of agency workers
x 1000 (FTE)**



Source: Japan Ministry of Public Management, Home Affairs, Posts and Telecommunications

US 2.0% EUR 1.6% JP 1.4%

Agency work penetration rate in key markets 1996-2012



Penetration rate developing differently across regions

The penetration rate is the amount of agency workers as a share of the total working population. In different regions, different trends can be observed. This is due to economic reasons as well as regulatory influences. Since 1996 penetration rates in these three key markets have been converging to a certain extent. In 2008 all markets experienced a significant decrease due to the economic crisis. The market in the USA has so far seen the best recovery among the three.

European average excludes Russia. If included, average would be 1.2%
Historic series European average was revised



36 *million
workers*

Almost 36 million people worked in agency work in 2012

The total number of agency workers in 2012 is significantly lower than in 2011 ⁽¹⁾. With 11.5 mln workers, the USA employs the largest number of people in 2012. Brazil is still second, as in 2011, but with less than 60% of the amount of workers it employed in 2011. South America and Europe both represent around 23% of the total amount of workers. The Asia/Pacific region employs another 10%.

(1) Based on 43 countries

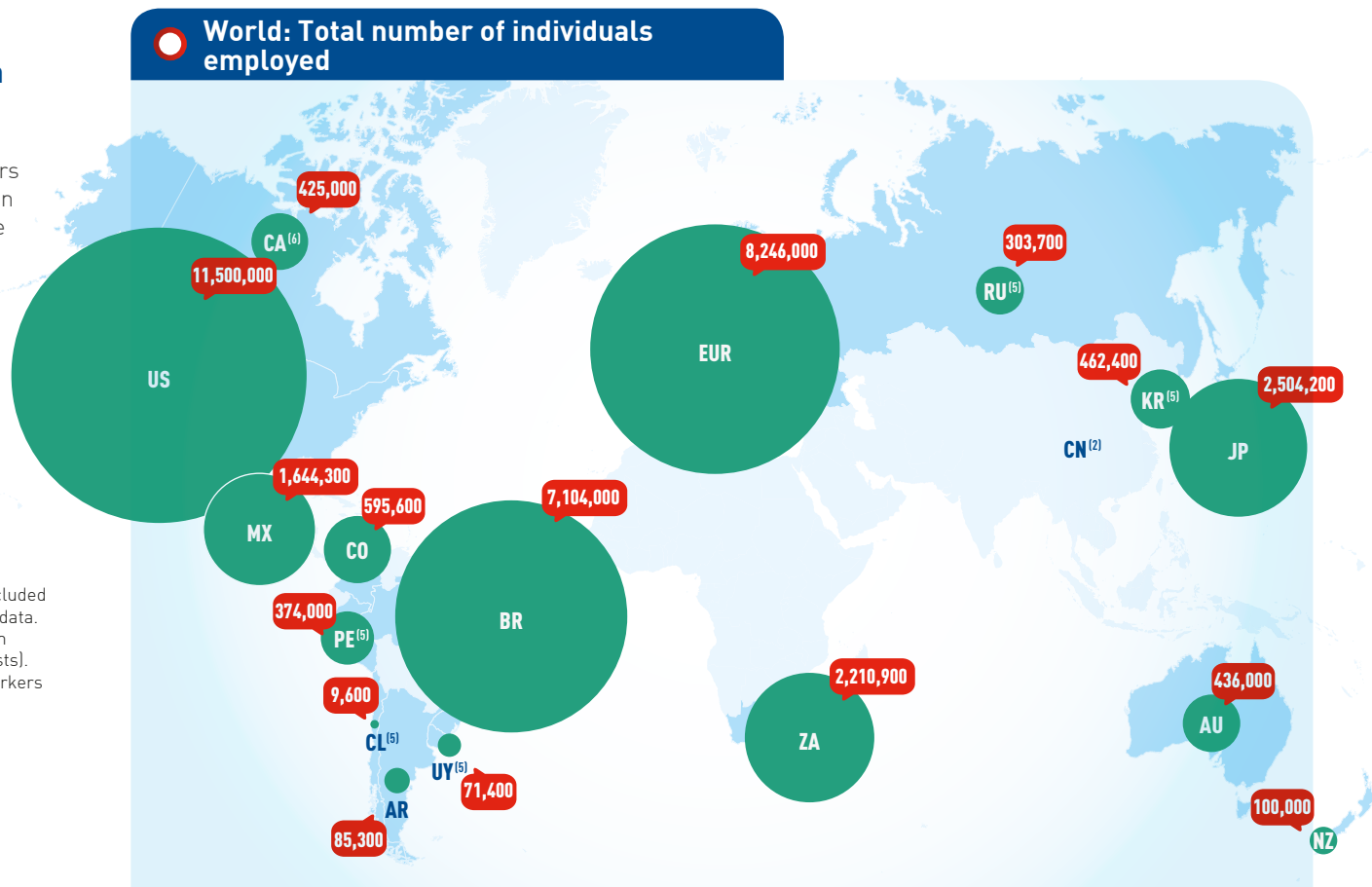
(2) Number of workers for China was not included due to a lack of reliable and comparable data. Estimates for China are around 27 million workers (Source: Staffing Industry Analysts).

(3) UK calculates total number of agency workers on a given moment.

(4) Bulgaria: FTE's.

(5) 2011.

(6) 2010



Source: Ciett national federations

1 THE PRIVATE EMPLOYMENT SERVICES MARKET DEVELOPMENTS IN 2012/2013



EUROPE
4.1 MILLION



ASIA/PACIFIC
1.8 MILLION



NORTH AMERICA
3.0 MILLION



AFRICA
1.2 MILLION

Agency workers filled 11.5 million full-time jobs in 2012

In 2012, around the world 11.5 million workers were employed daily as an agency worker ⁽¹⁾. That is a slight decrease from 2011 (12.4 million). Considering the bigger decrease in the total amount of workers, this means that on average, the number of hours for each agency worker has increased.

(1) Based on 46 countries

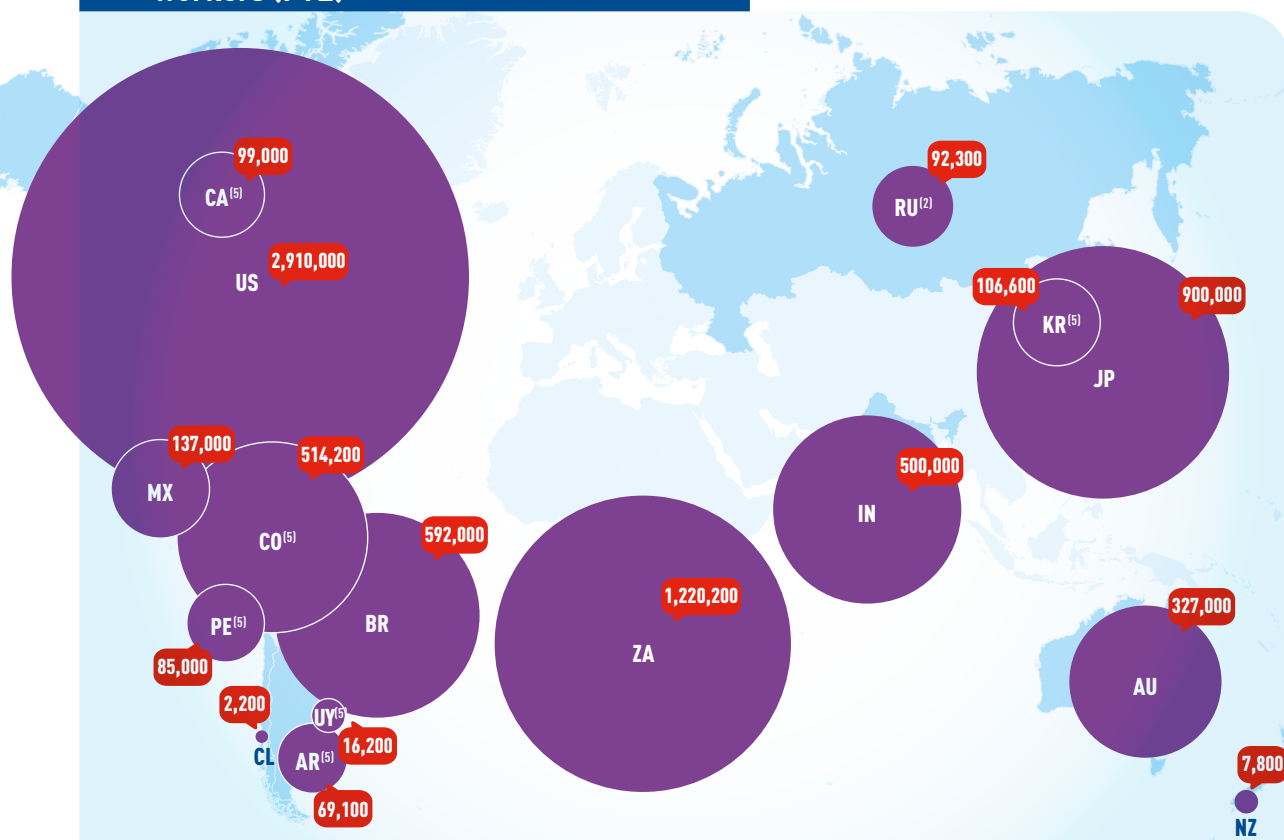
(2) Russia is part of European total

(3) Germany: total number of individuals

(4) UK calculates total number of agency workers at a given moment.

(5) 2011.

World: Daily average number of agency workers (FTE)

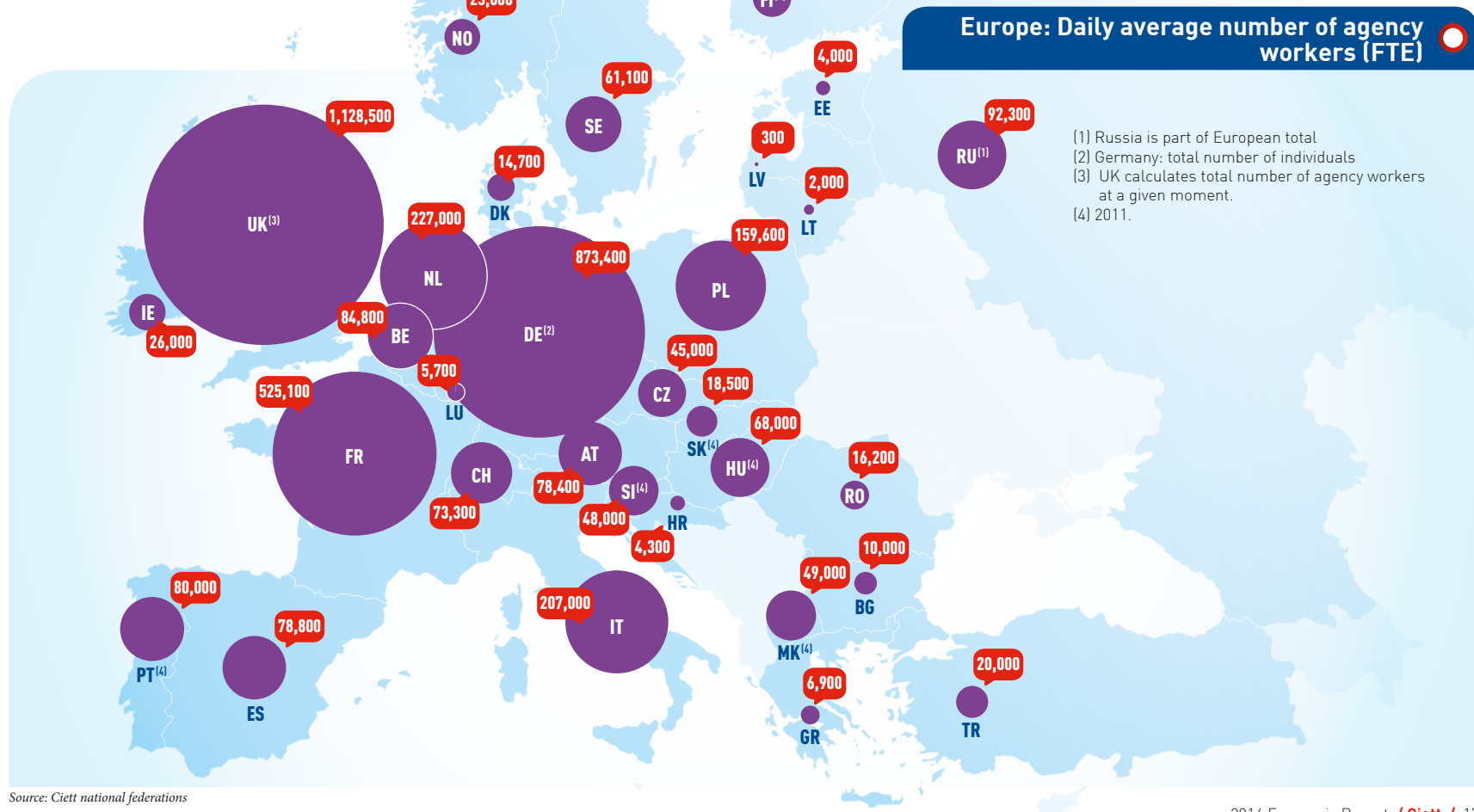




SOUTH AMERICA
1.4 MILLION



WORLD
11.5 MILLION

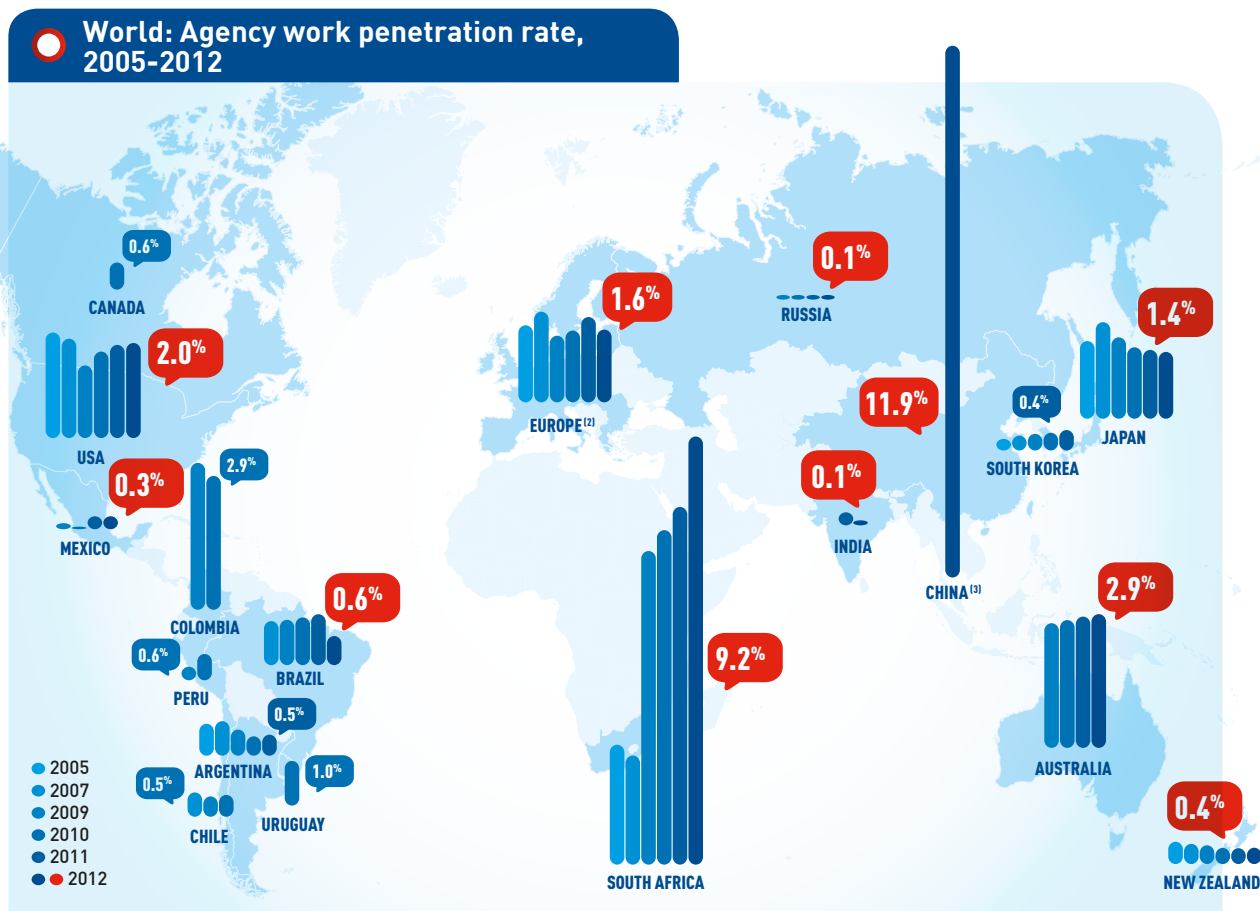


0.9% *world*
AVERAGE PENETRATION RATE

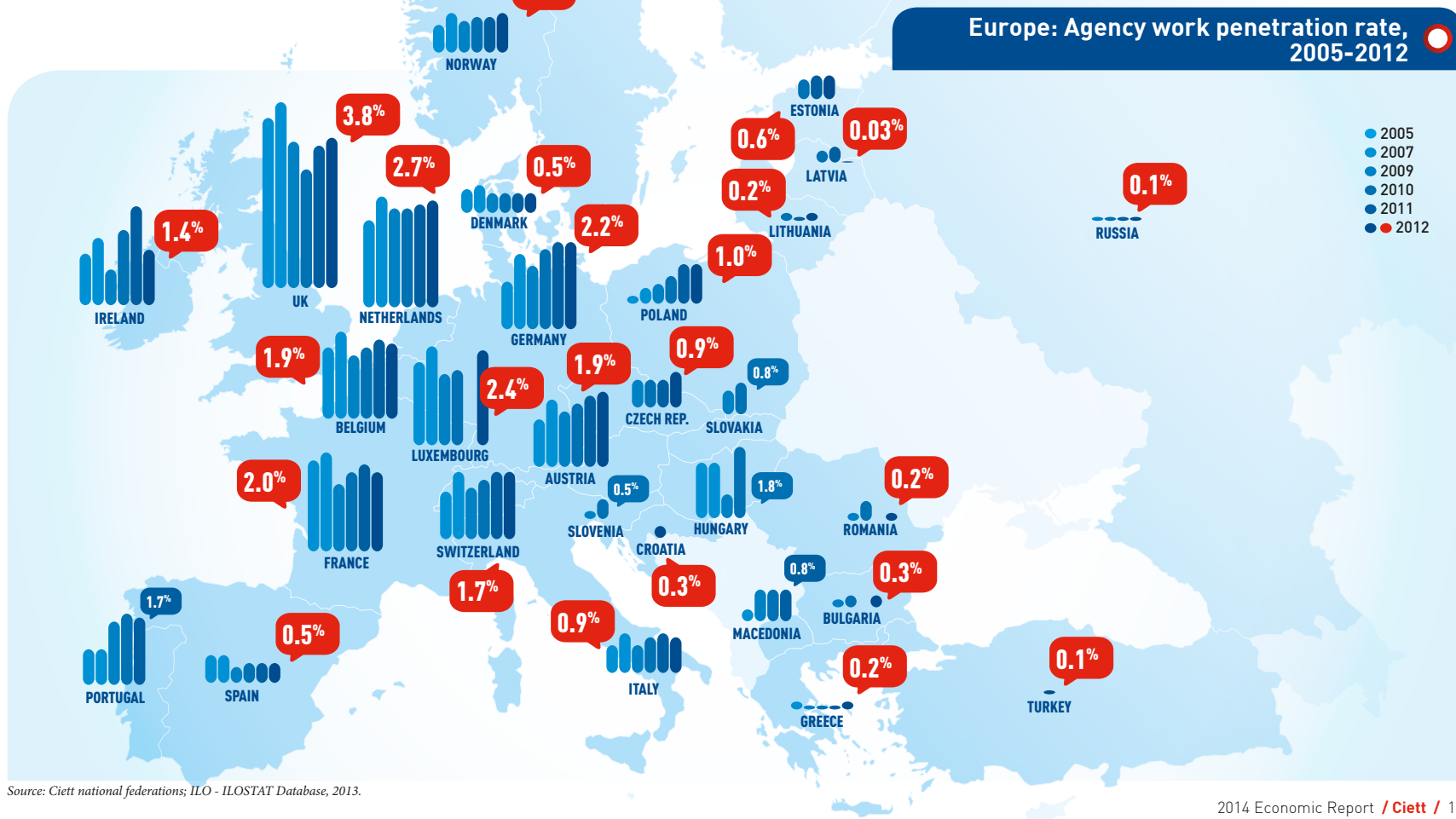
Many markets relatively stable

Penetration rates are quite stable in most markets around the world. South Africa is a big exception, with a growth from 7.7% to 9.2%. Most other markets show either only minimal growth or a decline in penetration rate in 2012. Most notably, penetration rates have gone down in Brazil and in Europe. The global average has gone down from 1.0% to 0.9% ⁽¹⁾.

- (1) Based on 46 countries. Global average excludes China due to lack of reliable data. Including China, average would be 2.0%.
- (2) European average excludes Russia. If included, average would be 1.2%. Historic series European average was revised
- (3) China estimate Staffing Industry Analysts



1.6% *Europe* AVERAGE PENETRATION RATE



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



AGENCY WORK AS A LEADING INDICATOR *of the economy*

*In times of economic recovery, available work is often first turned into jobs by agency work. **THIS IS WHY AGENCY WORK IS A LEADING ECONOMIC INDICATOR:** a rise in GDP will more or less coincide with a rise in the number of hours worked by agency workers. Total employment levels will often pick up and follow the same trend– only after several months.*

The following graphs also show that agency work is a catalyst rather than substitute of job growth.

“PRIVATE EMPLOYMENT SERVICES HAVE DEVELOPED AS PART OF THE SOLUTION TO MEET AN INCREASED VOLATILITY IN LABOUR DEMAND AND TO SUPPORT ORGANISATIONS IN ADAPTING TO THE IMPACT THAT EACH CYCLE HAS ON THEIR EMPLOYMENT LEVELS.”

European Commission European Social Situation Quarterly Review,
March 2012



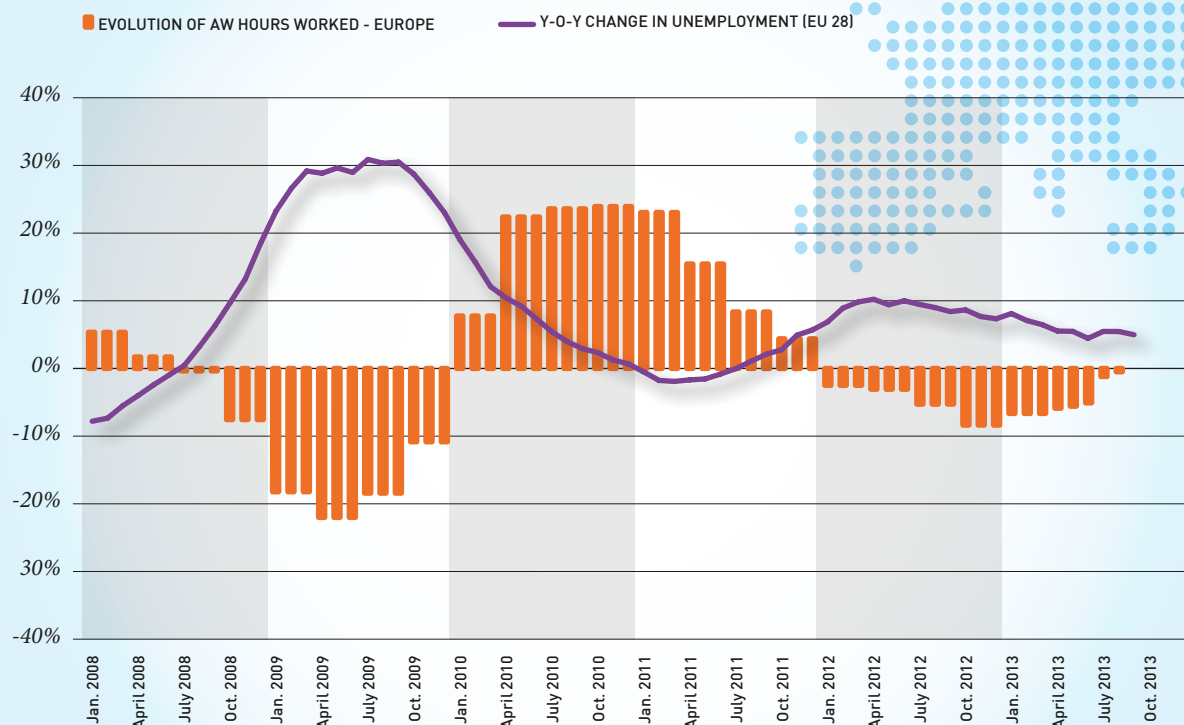
2 AGENCY WORK AS A LEADING INDICATOR OF THE ECONOMY

Agency work returns to positive growth as unemployment growth slows down

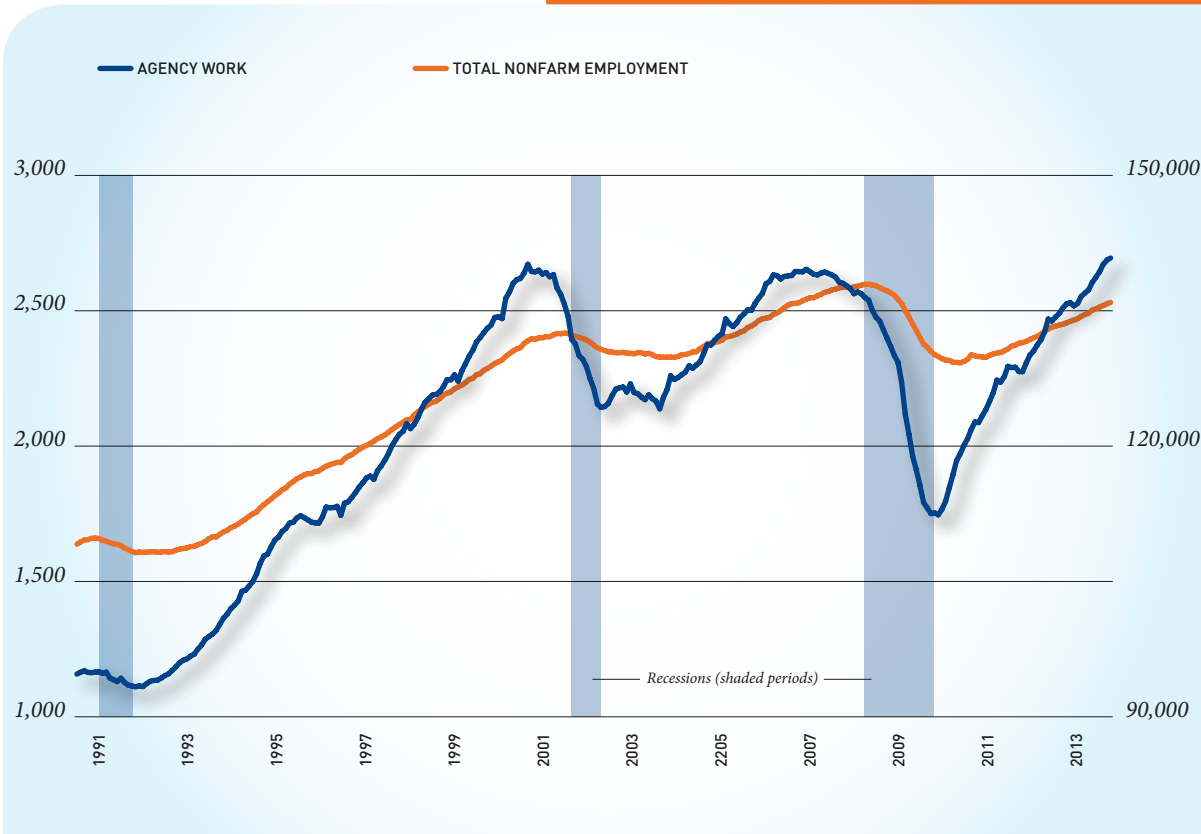
In Q3 2013, EU unemployment levels rose by 4.9% compared with the same period in 2012. This means a slowdown in the negative trend. In the meantime, the growth of hours worked by agency workers is nearing zero, which is an improvement from previous periods.

This data continues to display an inverse relationship between unemployment levels in the EU and the amount of agency work being carried out. Recent months have displayed negative growth, while at the same time, year on year unemployment levels have risen. In other words, a rising number of agency work hours generally occurs when unemployment goes down.

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



USA: Total employment versus agency work, in thousands



Source: U.S. Bureau of Labor Statistics

USA: Agency work precedes general employment trend

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.

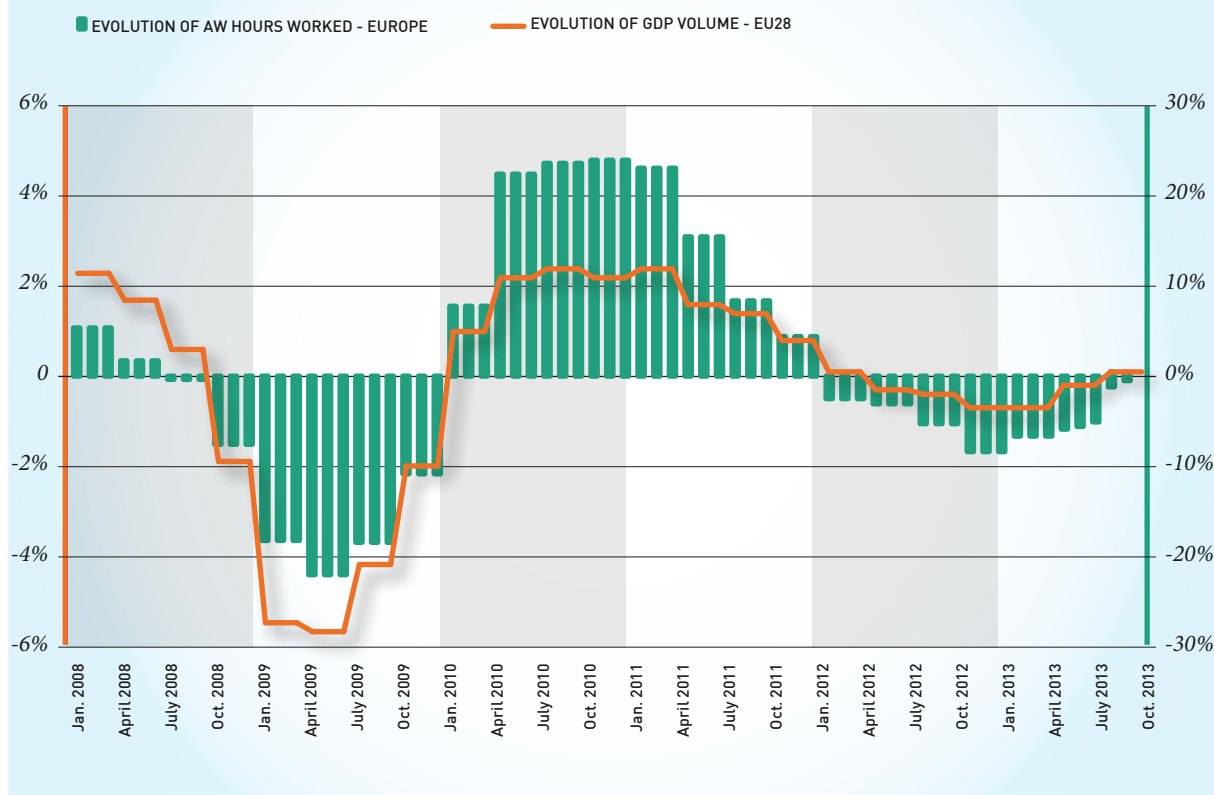
The US Bureau of Labor Statistics uses the term "Temporary help services" rather than agency work.

2 AGENCY WORK AS A LEADING INDICATOR OF THE ECONOMY

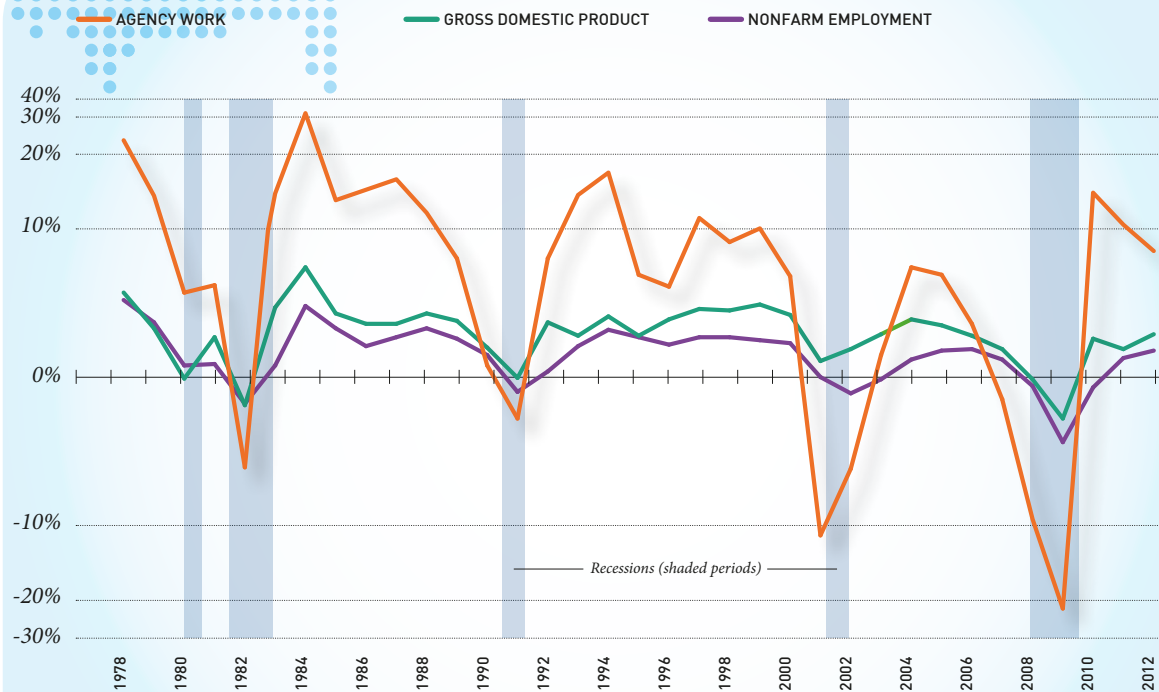
Europe: agency work mirrors economic growth

In Q3 of 2013, agency work in Europe declined by 0.5%, which was the best result since 2011. Coincidentally, GDP development in Europe also saw its best result since 2013, with 0.3% growth. These figures show a continuing pattern between the year on year growth rate of EU 28 GDP and the evolution of the number of hours worked by agency workers in Europe. This reflects that agency work is not a substitute companies use in bad times, but a useful service that will be used more if the economy prospers.

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



USA: Evolution of agency work compared to GDP and total employment



Source: National Bureau of Economic Research, U.S. Bureau of Economic Analysis and U.S. Bureau of Labor Statistics

Agency work is a leading economic indicator

The agency work industry is considered to be hyper-cyclical, meaning that it follows the same trends as employment and GDP, while troughs are deeper and peaks are higher. Since changes in the amount of agency work usually occur simultaneously with changes in GDP and before changes in general employment, agency work is an important indicator of what the nearby future will bring.



THE *Private Employment* *services* INDUSTRY

3

Private employment services offer their broad range of services around the world. Although activities may differ according to local situations, people are always at the core of their work.

*Therefore, it is of utmost importance for agencies to have dedicated and **EXPERT STAFF AT THE LOCAL LEVEL**, where they can be in touch with jobseekers as well as with the companies they serve.*



137,300
agencies



203,500
branches



624,500
internal staff

 **137,300**
agencies

 **203,500**
branches

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

In 2012, there were almost 137,300 private employment agencies around the world, which is about the same as in 2011. These had in total 203,500 local branches, where 624,500 internal staff were available to find a job for every person, and a person for every job. This means that private employment services have a very widespread network of labour market specialists covering many corners of the earth. 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 perspective.

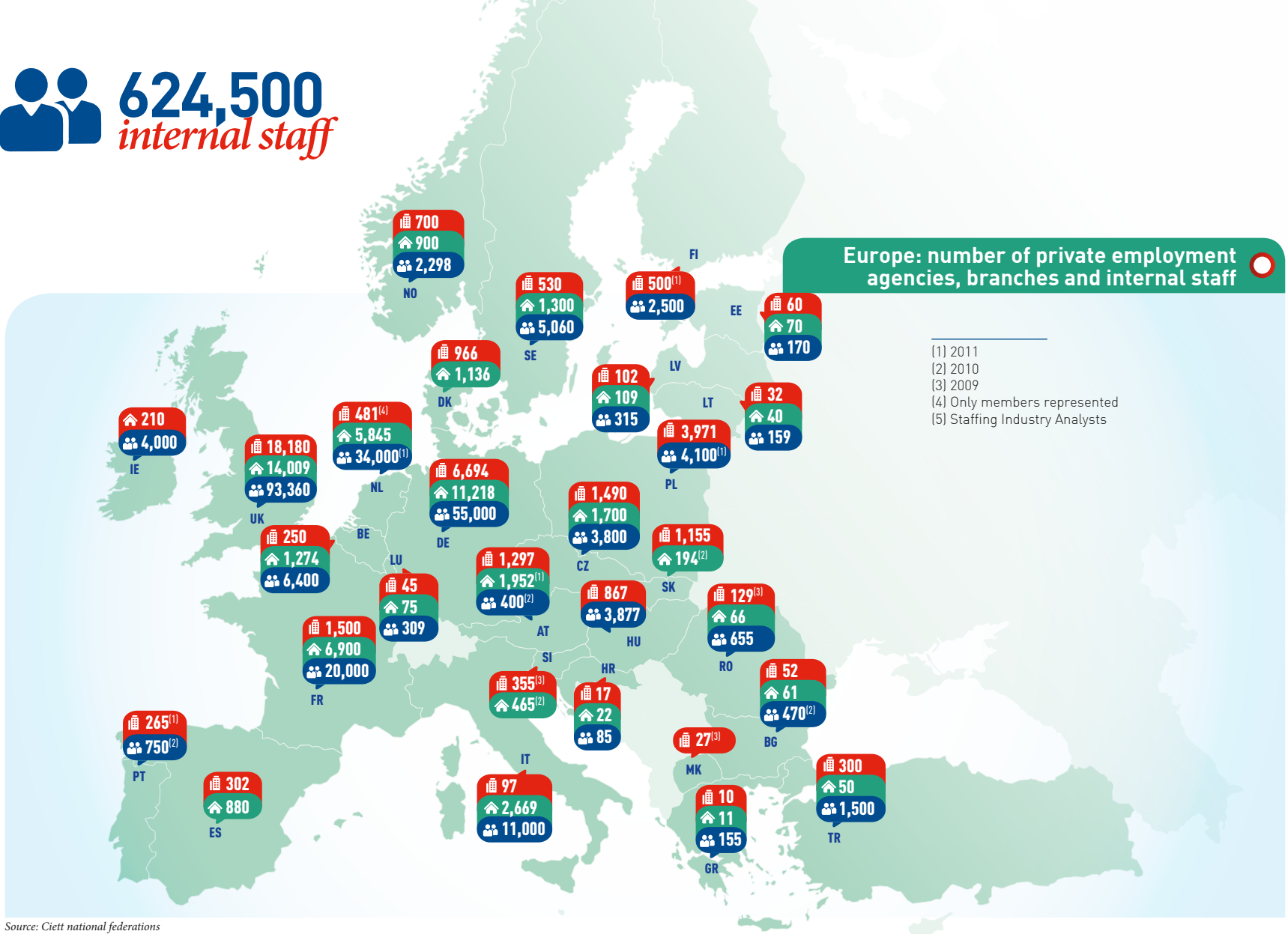
- (1) 2011
(2) 2010
(3) 2009
(4) Only members represented
(5) Source: Staffing Industry Analysts

World: number of private employment agencies, branches and internal staff



Source: Ciett national federations

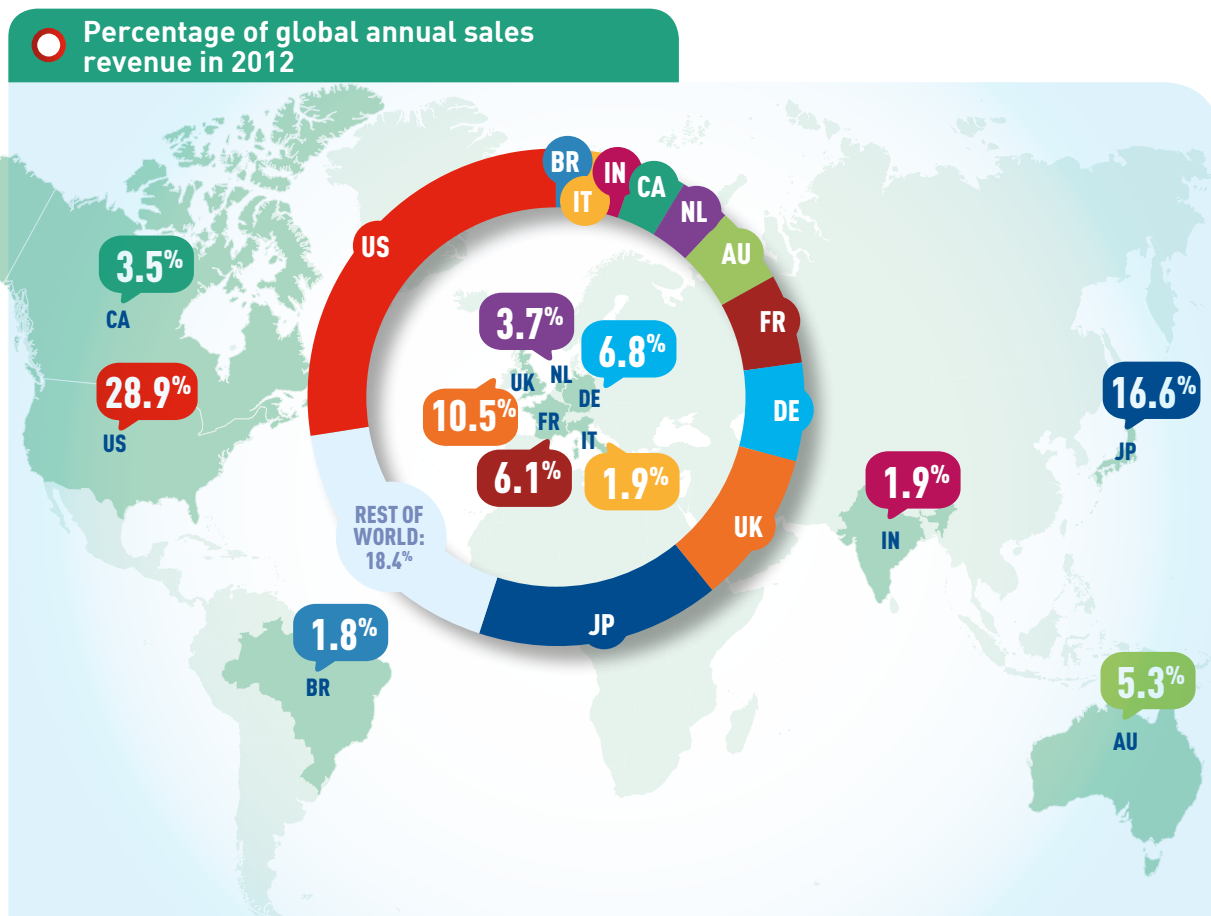
 **624,500**
internal staff



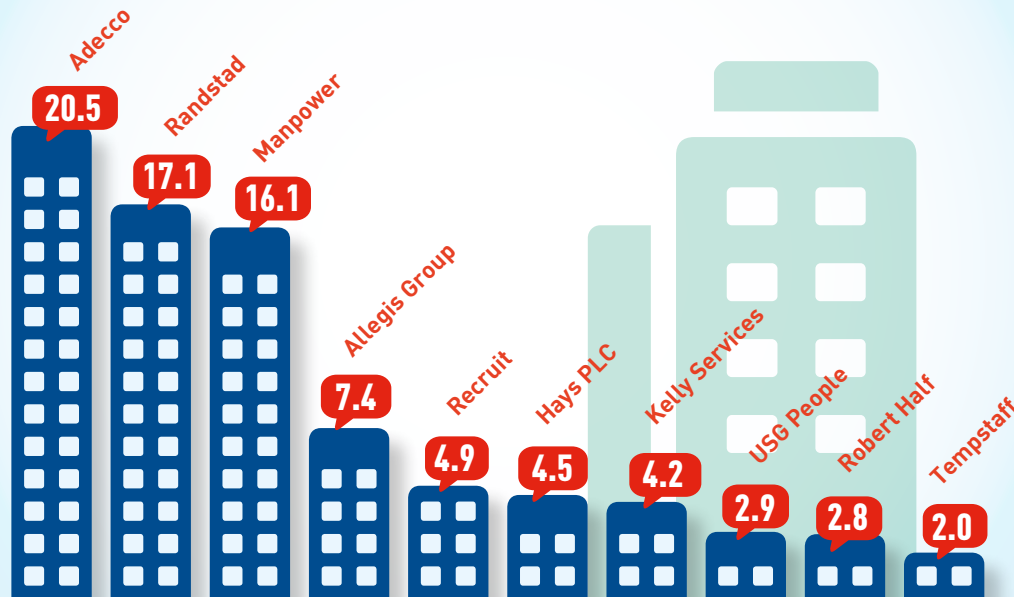
€ 299.3 Bn
Global annual sales revenue in 2012

USA grows at the expense of Europe

The USA is still the biggest market in the world, with about 28.9% of total annual sales revenue. This is up from 23% last year. Europe now represents 36.5% of the world market, which is down from 41% last year. Canada was a growing market in 2012, while the market in Brazil severely shrunk, resulting in only 1.8% of the total annual sales revenue.



Top 10 firms sales revenue in 2013 – billion of €



Source: "Largest Global Staffing Firms 2013", Staffing IndustryAnalysts

Global annual sales revenue up since 2012

The total agency work sector was worth € 299.3 Bn in 2013, up from € 259 Bn in 2012. The top 10 firms took up about 27.5% of the total, the top 3 represented 17.9% of global annual sales revenue.



The Profiles of **AGENCY WORKERS**

4

People doing agency work have very diverse backgrounds. Often, the type of people doing agency work depends on the country, and the sector or the company looking for agency workers. However, it is clear that agency workers are relatively young.

This is not surprising, since agency work is often seen as an important stepping stone onto the labour market. As such, **AGENCY WORK SUPPORTS PEOPLE IN SEVERAL IMPORTANT TYPES OF TRANSITIONS IN THE LABOUR MARKET:** from education to work, from unemployment to work, and from short term employment into longer lasting careers. The importance of smooth transitions is growing in a changing world of work. For companies, being able to efficiently adapt to changing workloads is the most important reason to use agency workers.

“TODAY, ABOUT HALF OF THE GLOBAL WORKFORCE IS ENGAGED IN WAGED EMPLOYMENT, BUT MANY DO NOT WORK FULL TIME FOR A SINGLE EMPLOYER. THE SUPPOSEDLY “ATYPICAL” HAS BECOME TYPICAL; THE “STANDARD” HAS BECOME THE EXCEPTION.”

Mr Guy Ryder, ILO Director General in his speech at the 2013 International Labour Conference on the future of work.

ON AVERAGE,

32%

WERE EMPLOYED
before,

68%

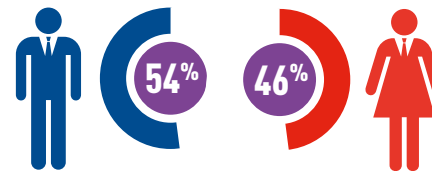
after
AGENCY WORK

61%

OF AGENCY WORKERS
ARE *under 30*

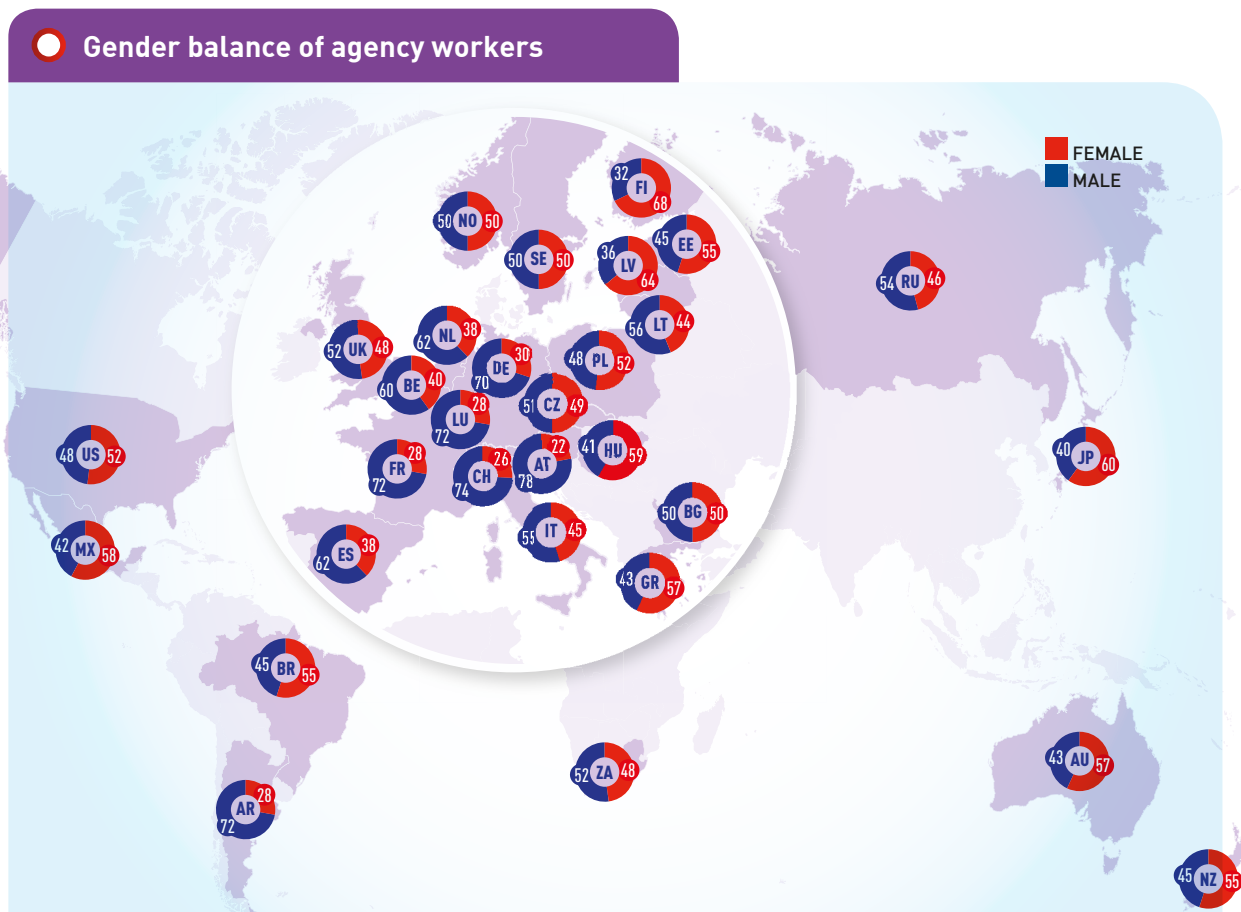
4 THE PROFILE OF AGENCY WORKERS AND THEIR ASSIGNMENTS

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. For example, in some countries agency work is mostly done by women who might drop out of the labour market once they start families (e.g. Japan), or by mothers who want to take care of their family and want a flexible work 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.



61%



Under 30
WORLDWIDE

Age of agency workers



Agency workers tend to be young

In most countries, the majority of agency workers is under 30. Worldwide, on average 61%. South Africa, India and Finland are striking examples of this trend. South Africa has only 2% of workers over 30, India 18% and Finland 11%. On the other hand, some exceptions include Spain, Germany, Luxembourg, France, Japan and New Zealand. Typically, most of these countries with older agency workers have a well established agency work sector. In these countries, agency work is generally considered to be a good and viable alternative to other types of employment.

(1) Germany: Categories are: <20; 20-29; 30-39; 40-49; ≥50

(2) Poland: Categories are: <25; 25-50; >50

(3) Italy, Netherlands, Norway: bottom category is: <25.

4 THE PROFILE OF AGENCY WORKERS AND THEIR ASSIGNMENTS

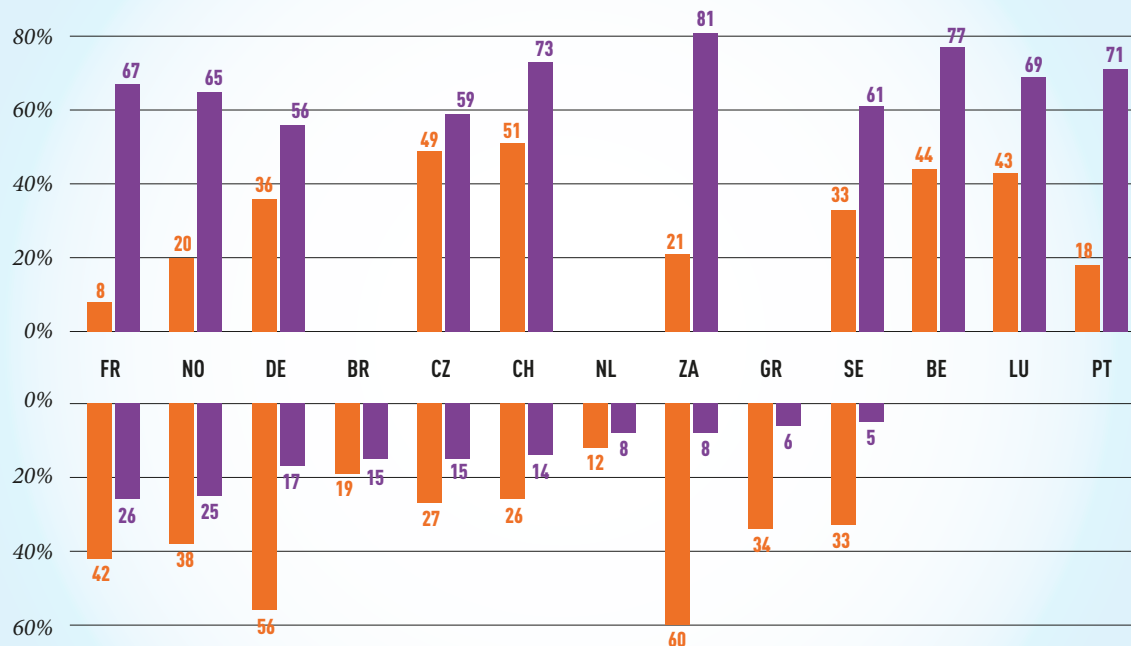


Agency work helps unemployed find jobs and remain in employment

People who start doing agency work out of unemployment will often remain employed after their assignment. Germany, South Africa, Greece and Sweden are the strongest examples of this stepping stone function of agency work. In South Africa, 60% of people starting agency work were unemployed before, while only 8% of people return to unemployment. The industry has a strong track record in providing labour market transitions from unemployment to work, as well as from work to long term careers. Many examples, including Norway, Portugal and France show that the amount of agency workers who remain in employment after agency work is far higher than those who were employed before agency work. So agency work is not only a short time solution, but provides a stepping stone into long term employment.

Employed / unemployed before & after agency work

% of agency workers that are employed (either with a temp, fixed-term or open-ended contracts) before and 12 months after temping

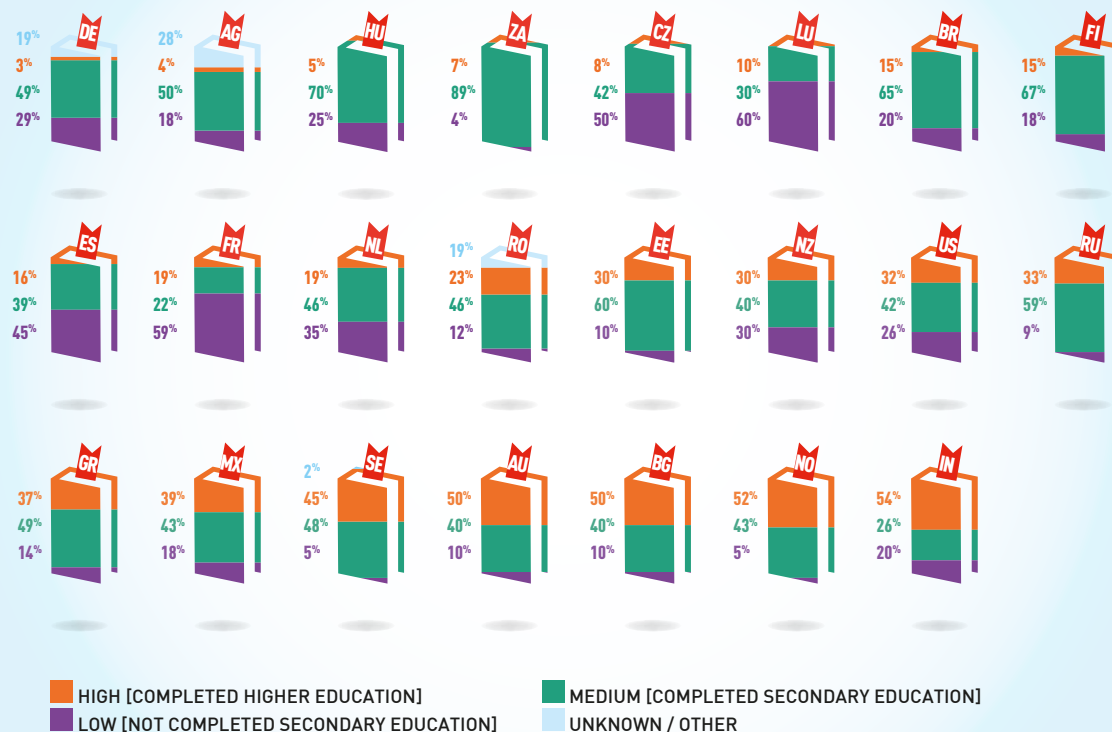


% of agency workers that are officially registered as unemployed before and 12 months after temping

BEFORE
AFTER



Educational attainment level of workers high-to-low



Agency workers are medium to high educated

On average, 27% of agency workers completed higher education, which is more than the still significant group of 23% of agency workers without secondary education. This shows that agency work can play an important role in helping both low- and high-skilled workers to get valuable experiences on the labour market.

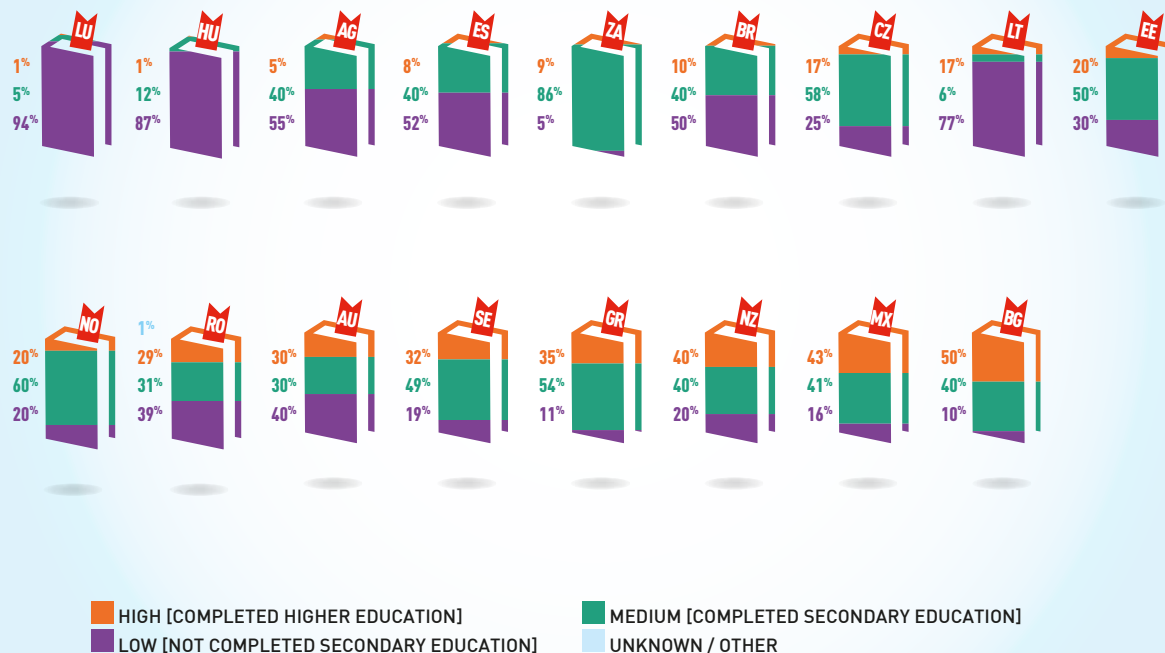
4 THE PROFILE OF AGENCY WORKERS AND THEIR ASSIGNMENTS



Agency workers are relatively evenly distributed in low, medium and high skilled jobs

On average, 42% of agency work requires medium skill levels. Low skilled work accounts for about 35%, high skilled work for 23%. The skill level required often has a relation to the sector where agency work mostly takes place. Luxembourg for example has a big share of agency work in the construction sector, and in Argentina many agency workers work in manufacturing, and both countries have a larger share of low skilled work.

Skill level required for temporary agency worker jobs



AVERAGE LENGTH OF AW *assignments*



Average length of agency worker assignments



70% of temporary agency work assignments are over 1 month

The length of individual assignments vary greatly across countries, but on average, only 30% of assignments are under one month duration, while 41% is over three months. Naturally, an agency worker can do multiple consecutive assignments.

4 THE PROFILE OF AGENCY WORKERS AND THEIR ASSIGNMENTS

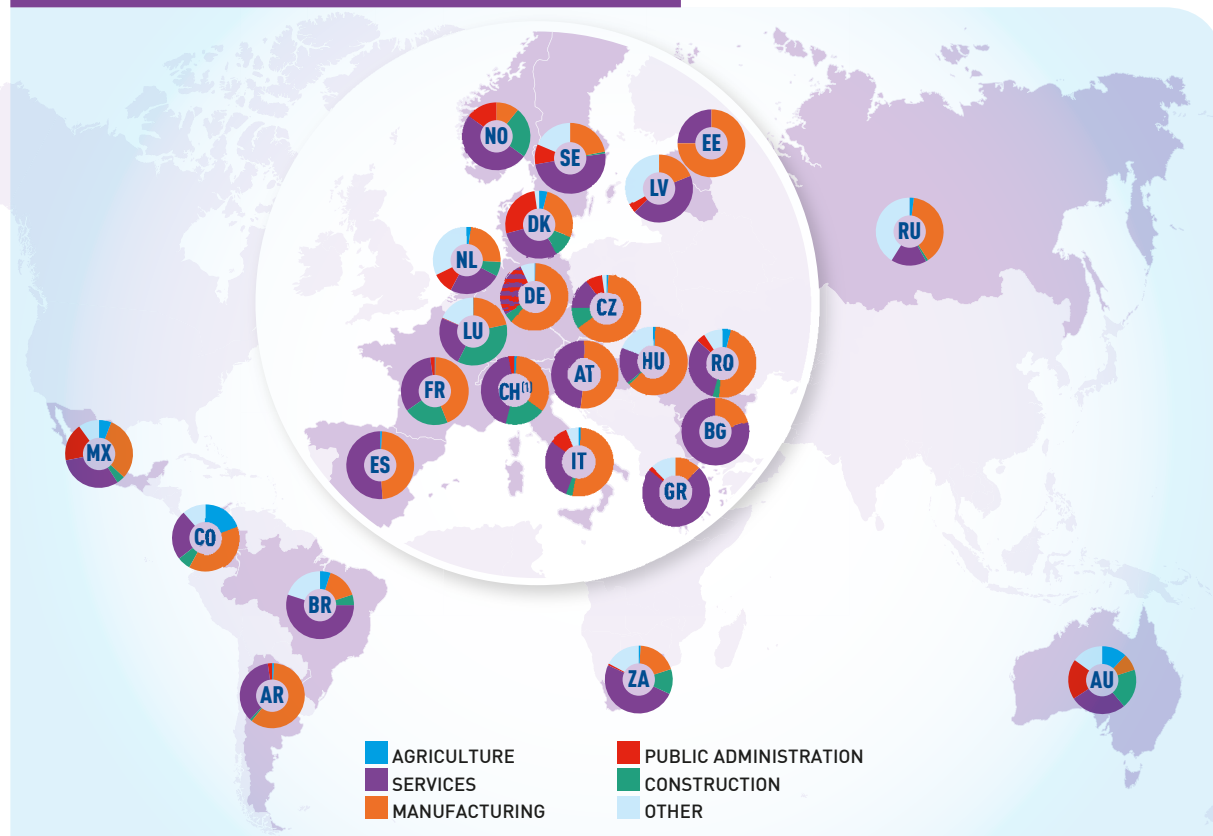


Most agency workers employed in services and manufacturing

In most countries, agency workers primarily work either in services (on average 38%) or manufacturing (33%). Both of these sectors have gained somewhat in importance since 2011.

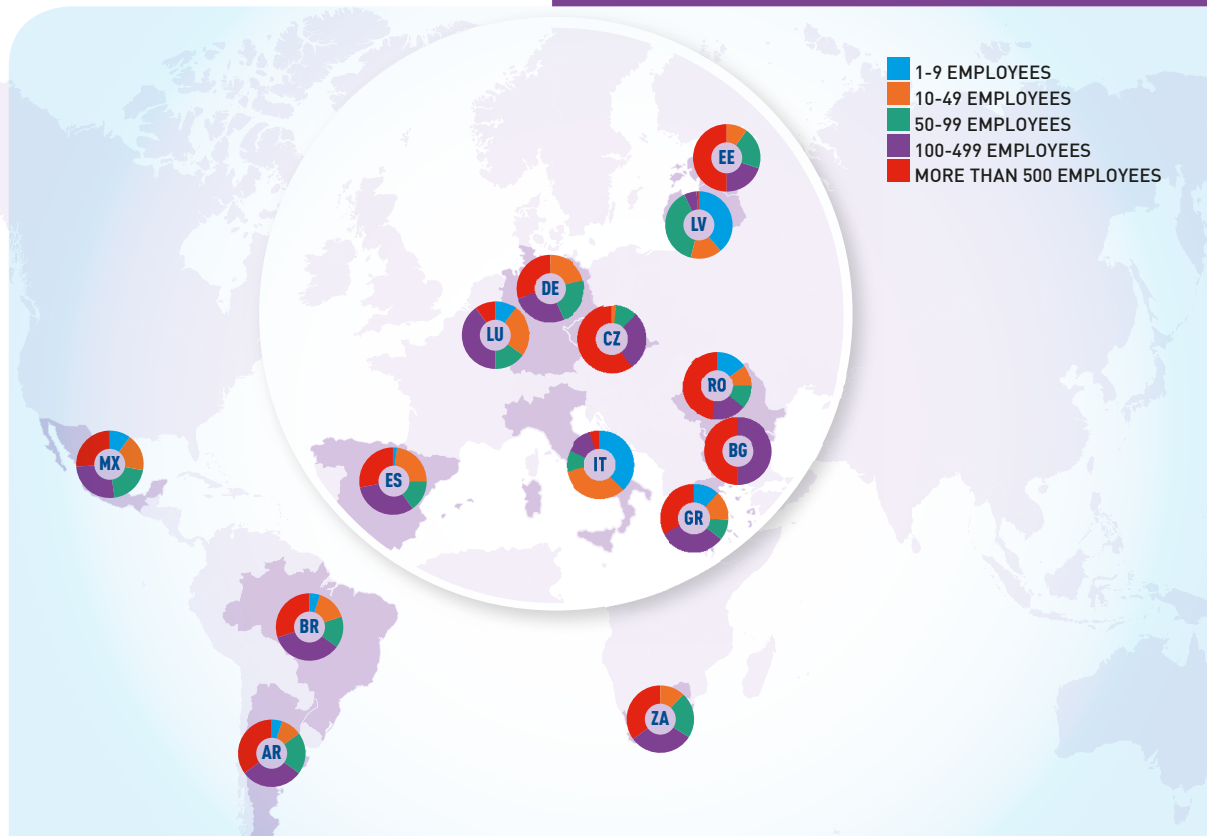
In some countries, a large proportion of agency work is classified as "other", relating to different data collection methodologies. This distorts the picture.
(1) 2010

Agency worker employment by sector





Size of companies using agency work



46% of agency workers are employed by companies with less than 100 employees

All kind of companies use agency workers. Approximately half of the agency workers work in companies that have over 100 employees. Companies with less than 10 employees hire approximately 12% of all agency workers. Differences between countries are significant here. While in Italy or Latvia small businesses are the biggest group of companies hiring agency workers, in Bulgaria, the Czech Republic or Romania the biggest group consists of companies larger than 500 employees. Both economic and regulatory factors explain the differences.

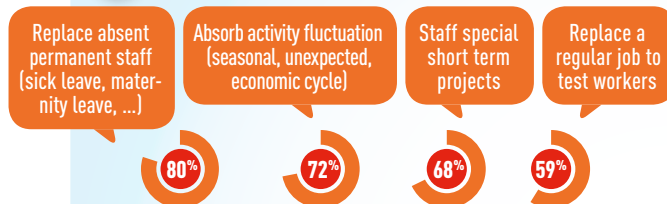
4 THE PROFILE OF AGENCY WORKERS AND THEIR ASSIGNMENTS

Companies cite flexibility and temporary demand as main reasons to use agency work

Although there are many factors that play a role in a companies' decision to hire an agency worker, the most important reasons include the possibility to effectively deal with peaks in the work load, and replacing staff absent due to sickness, maternity leave etc. In research done in the USA, Germany, Sweden and the UK other regularly cited reasons are short term projects, often requiring specific skills, or as a way to test out potential new permanent workers. Another interesting factor is that staffing agencies provide workers in an easy and efficient way, resulting in lower costs and less bureaucracy.

Reasons for hiring agency workers

US PERCENTAGE OF BUSINESSES WITH 25+ EMPLOYEES THAT CITE AS A MAIN REASON FOR HIRING AGENCY WORKERS: ⁽¹⁾



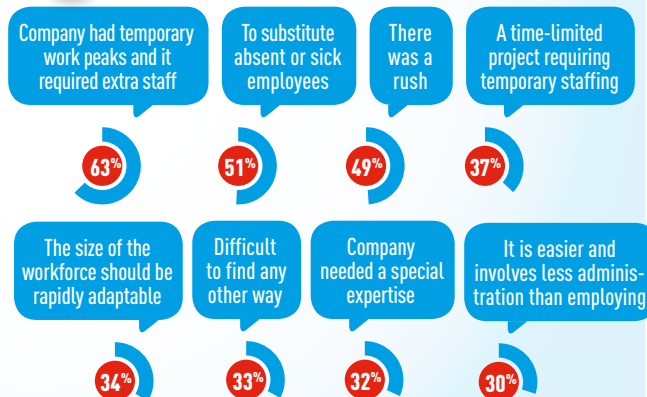
DE REASONS THAT ARE "IMPORTANT TO VERY IMPORTANT" FOR COMPANIES TO HIRE AGENCY WORKERS ⁽²⁾



UK HOW IMPORTANT WOULD YOU SAY THAT AGENCY WORK IS FOR YOUR ORGANISATION? "IMPORTANT TO VERY IMPORTANT" ⁽³⁾



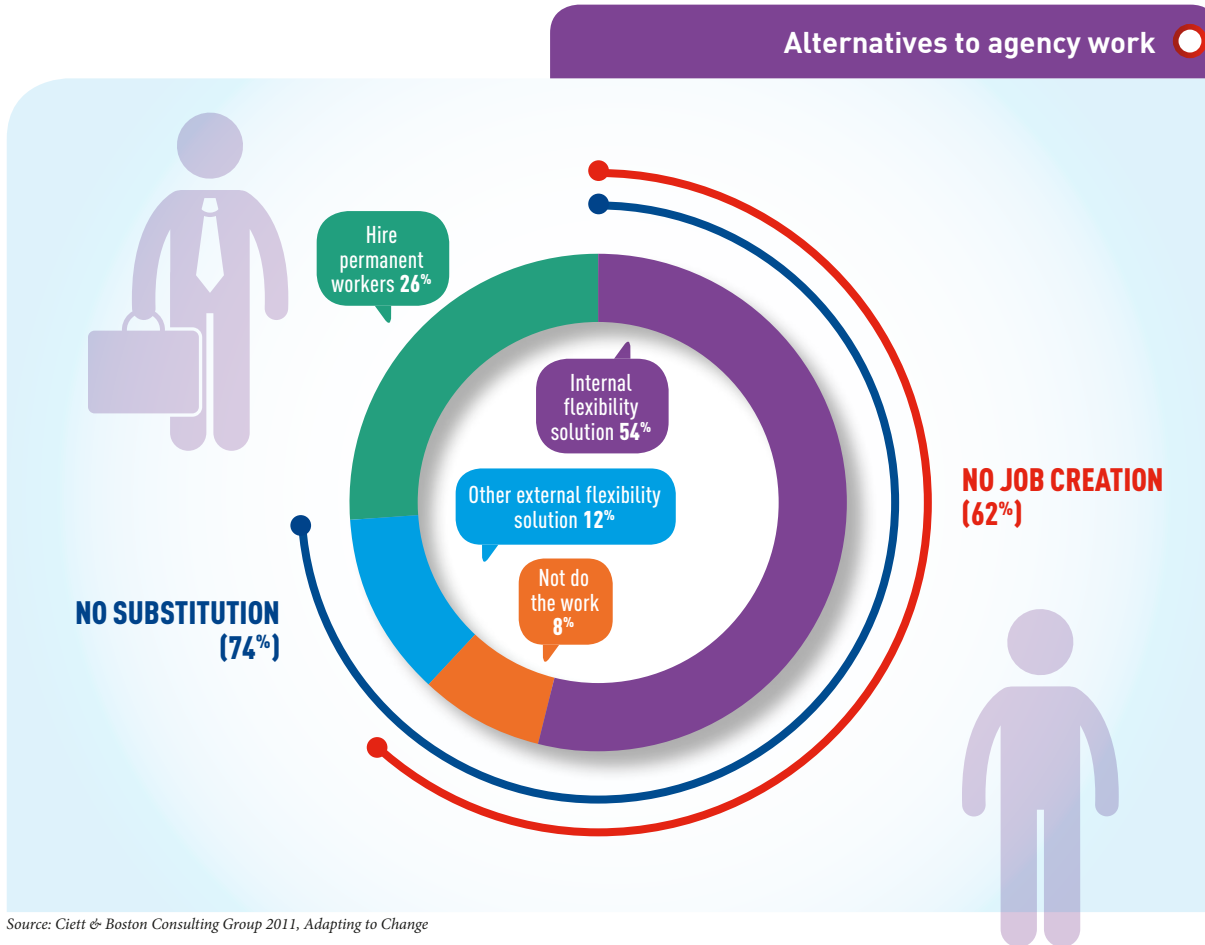
SE WHICH OF THE FOLLOWING REASONS DID YOU HAVE FOR HIRING AGENCY WORKERS? ⁽⁴⁾



Source: (1) American Staffing Association Client Survey, 2005, (2) Zeitarbeit in Deutschland – Treiber für Flexibilität und Wachstum, IW Consult GmbH, 2011, (3) REC JobsOutlook 2013 aggregate data, (4) PERSONALINHYRNINGEN I SVERIGE, En studie av 600 arbetsgivares anlitande av bemanningsföretag 2012, Bemanningsföretagen (Swedish Staffing Association), 2012.

62% OF AGENCY WORK JOBS *would not* HAVE BEEN CREATED WITHOUT ACCESS TO AGENCY WORK

Alternatives to agency work



Agency work mostly not a substitute for permanent workers

In a study done by the Boston Consulting Group and Ciett, 74% of companies reported that they would not consider hiring permanent workers as an alternative to agency work. In 62% of the cases there would be no job creation as companies chose internal flexibility or not to do the work at all. This shows that private employment services, and agency work in particular, are an engine of job creation and economic growth. Agency work gives employers the opportunity to turn available work into jobs.

A stylized illustration of a person in a light pink suit and white tie, smiling. A large red circle with a white number '5' is positioned on the person's chest. To the left of the person, there is a dark red horizontal bar with rounded ends. Above the person's head, there are four red dots of varying sizes. The background is white with a dark red curved shape on the right side.

Satisfaction & motivation **of AGENCY WORKERS**

Previous chapters have shown that agency work contributes to economic growth, helps to bring about labour market transitions, and provides an answer to business needs for adaptability. At the center of this all however, **IS A PERSON'S CHOICE TO WORK AS AN AGENCY WORKER.** This chapter explores the reasons people have to make this choice, and if they are happy with their job as an agency worker.

Research shows a large variety of reasons, but remarkable consistency in agency workers high job satisfaction.



OF WORKERS *would recommend*
AGENCY WORK



OF WORKERS ARE SATISFIED
TO *very satisfied*

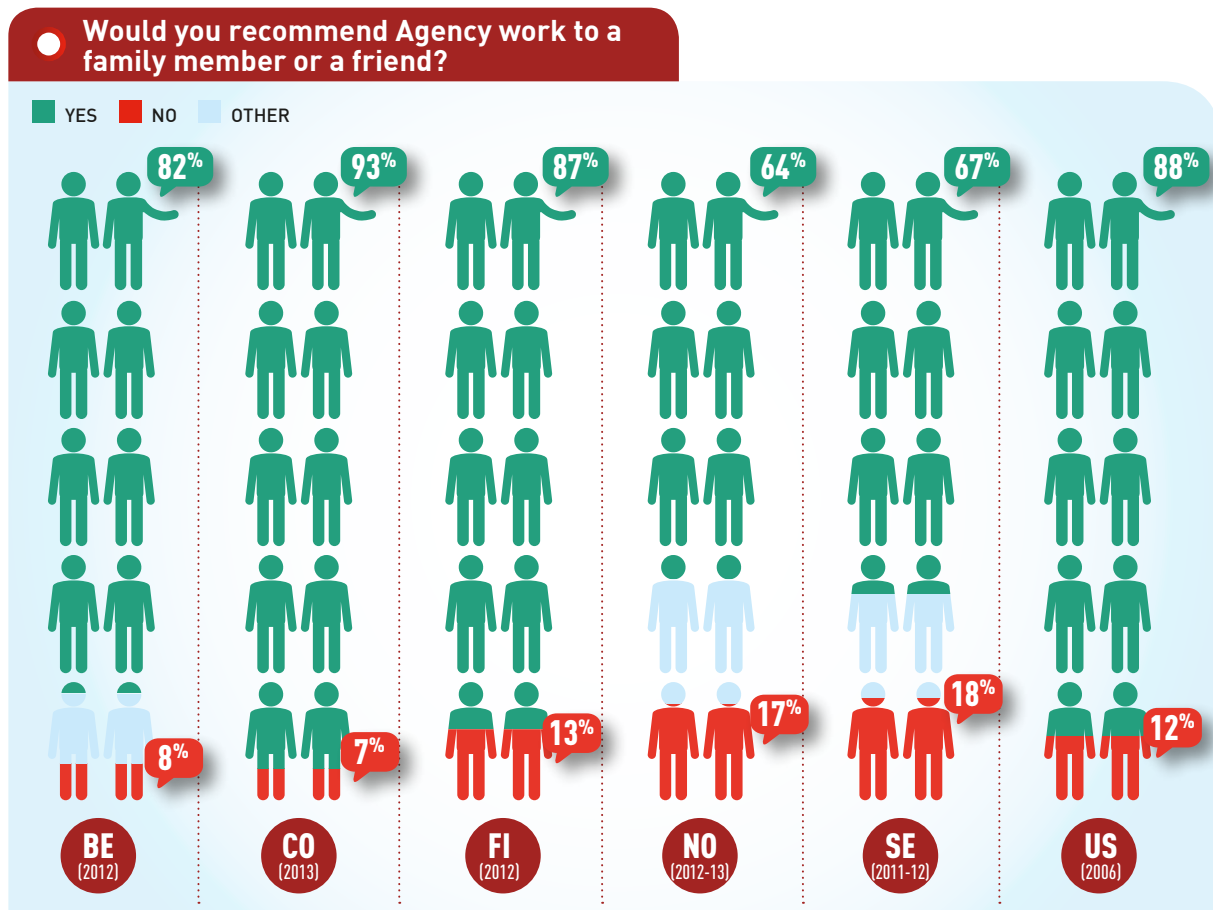
5 SATISFACTION AND MOTIVATION OF AGENCY WORKERS



OF WORKERS *would recommend* AGENCY WORK

80% of agency workers would recommend it 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, 83% of agency workers report that they are satisfied or very satisfied. This clearly shows that working through an agency is a conscious and deliberate choice for a vast majority of the workers.

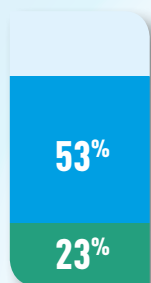


Source: Ciett national federations

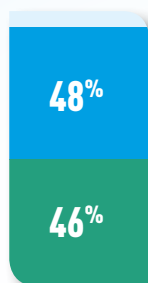


49% OF WORKERS ARE SATISFIED,
34% ARE *very satisfied*

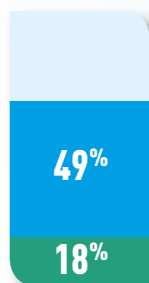
Percentage of agency workers
who are satisfied with their work



BE (2012)



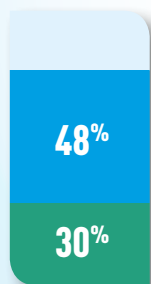
CO (2013)



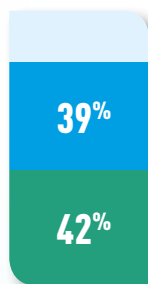
FI (2012)



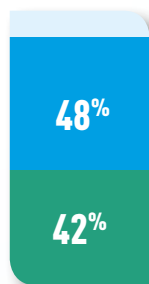
FR (2013)



NO (2012/2013)



SE (2011/2012)



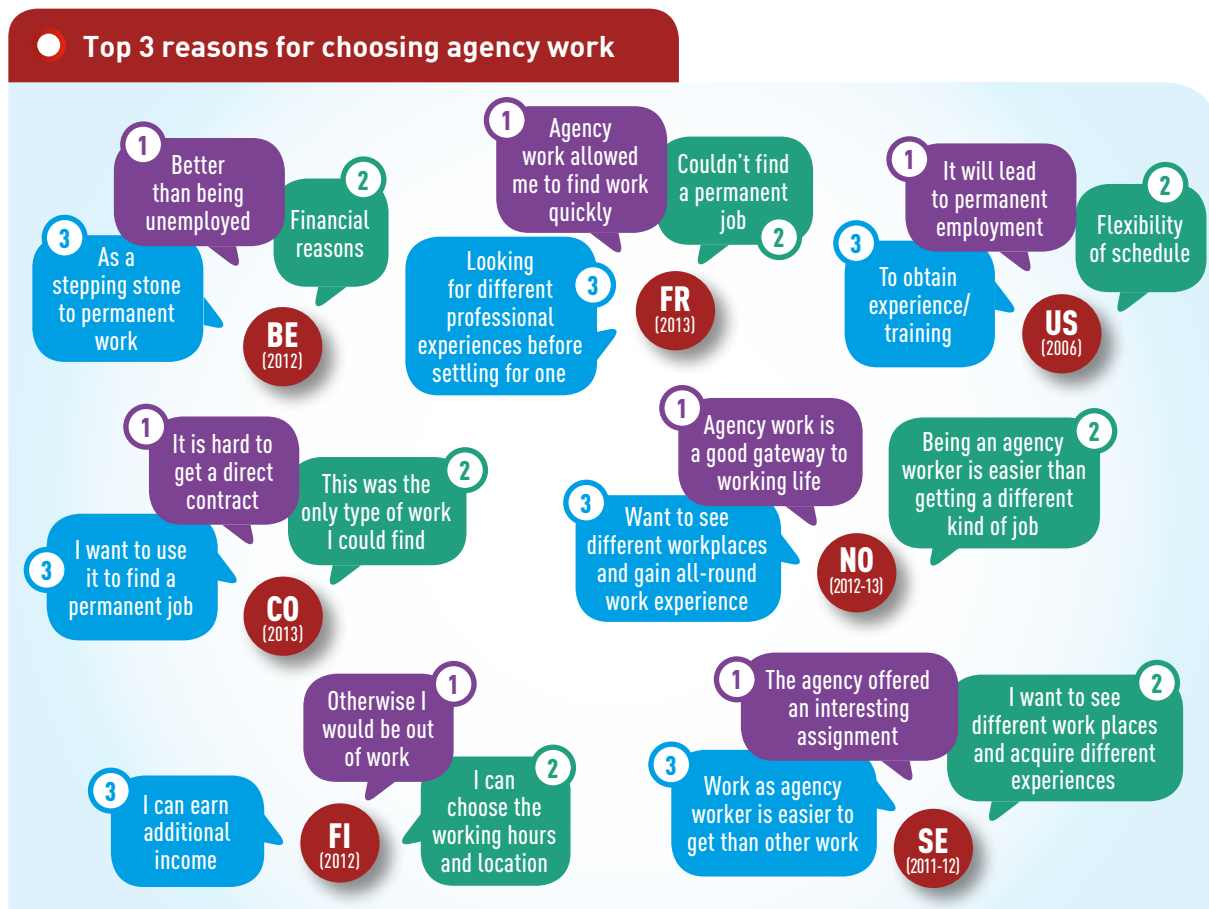
US (2006)

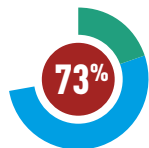
■ SATISFIED
■ VERY SATISFIED
■ OTHER

5 SATISFACTION AND MOTIVATION OF AGENCY WORKERS

There are many reasons to choose agency work

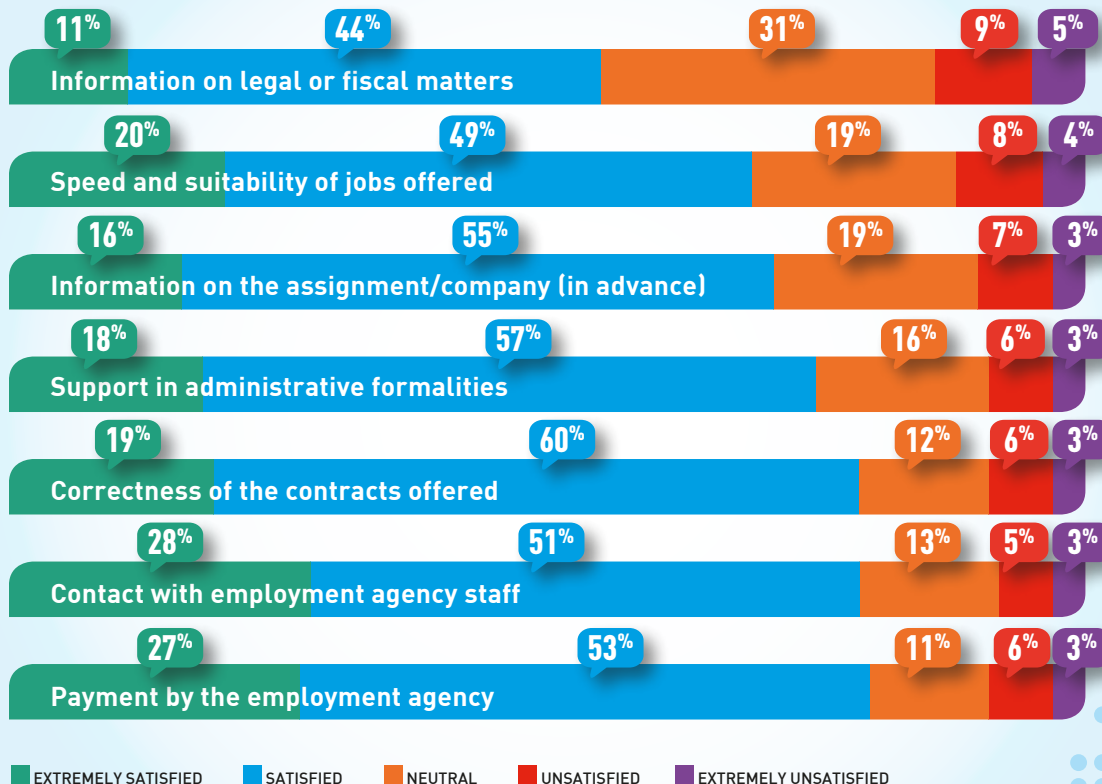
Agency work can provide in a multitude of specific needs that an individual worker might have. For workers, it can provide flexibility both in hours, location and duration of employment, or it can provide them with access to the labour market that they might otherwise not have.





20% ARE *extremely satisfied*,
53% ARE SATISFIED

The Netherlands: Agency worker satisfaction with the employment agency

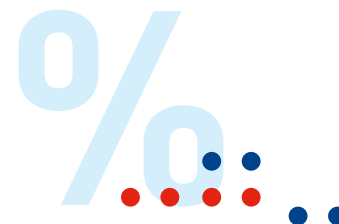


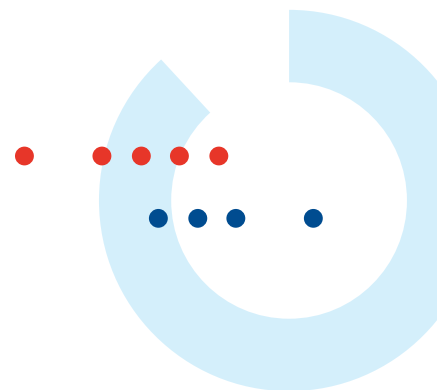
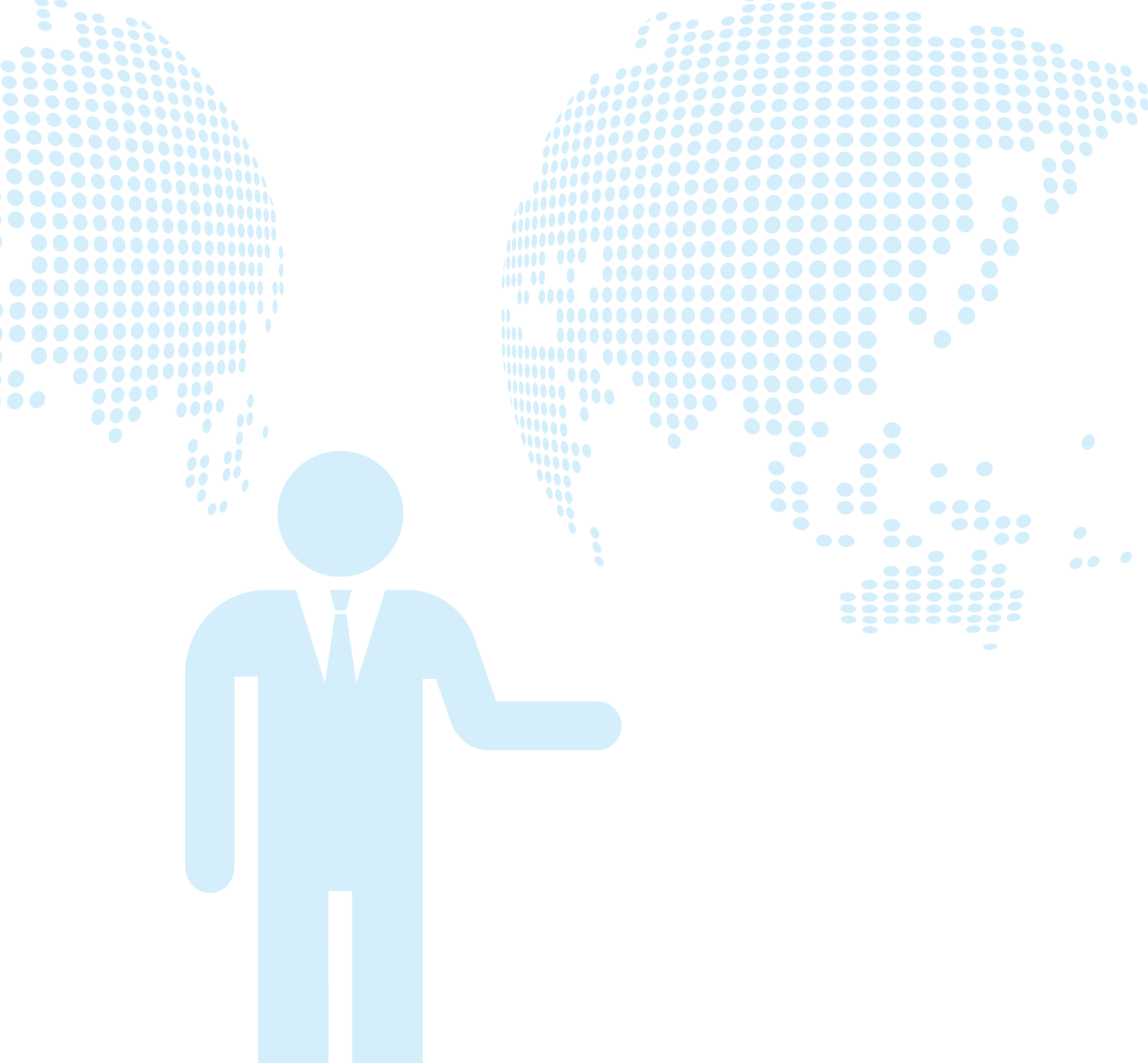
Private employment agencies offer a professional service to businesses and workers

Private employment services are experts on the local labour market, and help workers not only find a position, but also employ them, deal with all sorts of administrative issues, and pay them for their work. It is the agency that has full responsibility for the employment relation with the worker, not the user company.



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 **49 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 gather over **200,000 BRANCHES** and employ more than **11.5 MILLION AGENCY WORKERS** on a daily average (FTE).*
- *Its main objective is to help its members conduct their businesses in a **LEGAL AND REGULATORY ENVIRONMENT** that is positive and supportive.*

- *Ciett is divided into **SIX REGIONAL ORGANISATIONS**: Africa/Near East, Northern Asia, Southern Asia, North America, South America [CLETTe&A], and Europe [Eurociett].*



ABOUT THE WAY TO WORK

The way to work; a job for every person, a person for every job is the unified vision for the global private employment services 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.

Directing the **WAY TO WORK** being a labour market entry point, encouraging transitions, enhancing people's skills

Offering a new **WAY TO WORK** providing labour contractual diversity to meet work-life balance and individual constraints

Giving people a great **WAY TO WORK** delivering decent and quality jobs

Helping people to organise the **WAY TO WORK** matching skills and jobs better and faster

The values of the private employment services industry are centred around people, because work is an essential part of life and identity. These values demonstrate the industry's commitment to advancing people and businesses through work:

QUALITY: The industry promotes ILO core conventions and decent work and calls for appropriate regulation to be adopted on private employment services. The industry works to raise self regulation and quality standards and is committed to fighting rogue and untrustworthy providers in order to get rid of abuses and illegal practices.

INCLUSIVENESS: The industry is committed to engaging in constructive dialogue with all relevant stakeholders – governments, trade unions, NGO, academics - to ensure every voice is heard. We are an open industry, willing to develop an inclusive society by increasing labour market participation and diversity.

SERVING: As a professional services industry, we are driven by customer satisfaction, be it companies or individuals. We are here to support our customers in their diverse needs and expectations, helping them to adapt to change and to realise their ambitions.

FREEDOM: We provide more work opportunities for more people, therefore increasing freedom of choice in the labour market. We give people the freedom to choose when, where and how they work.



*The private employment services industry has the **COLLECTIVE POWER TO BRING ABOUT POSITIVE CHANGE** to labour markets and act as a bridge to social and economic progress.*

*As such, in 2011, **CIETT'S MEMBERS HAVE MADE FIVE PLEDGES** regarding their contribution over the next five years to individuals and companies in the labour market.*



CIETT MEMBERS

AFRICA / NEAR EAST

Morocco
South Africa
Zambia

NORTHERN ASIA

China
Japan
South Korea

SOUTHERN ASIA

Australia
India
New Zealand
Nepal
Singapore

NORTH AMERICA

Canada
Mexico
USA

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

SOUTH AMERICA

Argentina
Brazil
Chile
Colombia
Perú



GLOSSARY OF USED TERMS & ACRONYMS

Temporary agency work

Both at international and EU level, agency work is legally defined and recognised. In ILO Convention on private employment agencies (C181, 1997) as well as in the EU Directive on temporary agency work (2008/104/EC), the three-party relationship is precisely characterised: "Services consisting of employing workers with a view to making them available to a third party, who may be a natural or legal person (usually referred to as a "user company") which assigns their tasks and supervises the execution of these tasks"

Private employment services (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.

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

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)."

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



International Confederation of
Private Employment Agencies

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