

APAC Staffing Industry Report Webinar

Speakers:

John Nurthen, Executive Director, Global Research

Fiona Coombe, Director, Legal & Regulatory Research

Francesca Vassallo-Todaro, Operations Development Specialist

Elizabeth Rennie, Global Workforce Solutions Research Director



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5 September 2017

9 am BST/

1:30 pm Mumbai/

4 pm Singapore/

7pm Melbourne

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Staffing Industry Report Webinar

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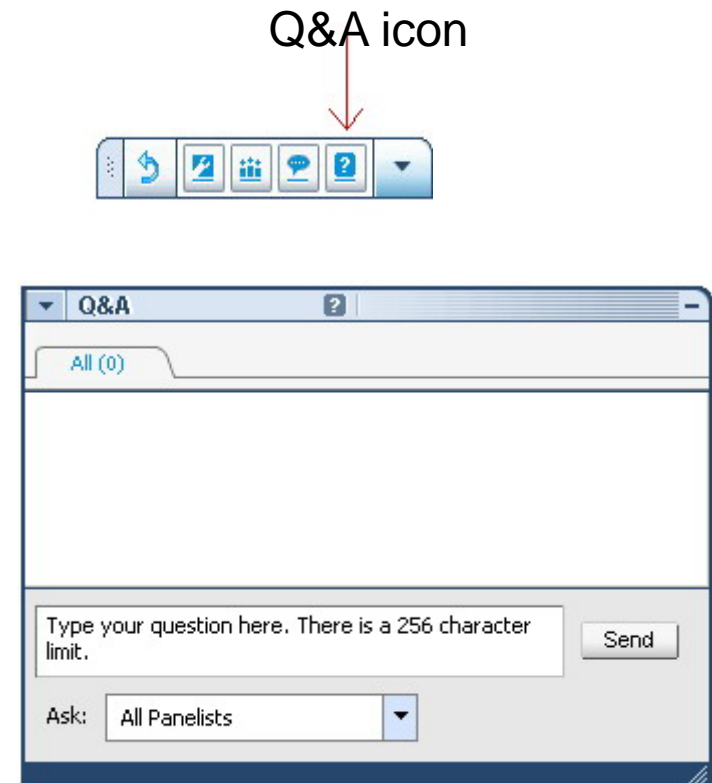
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This will open the Q&A window on your system only

Type your question into the small dialog box and click the Send Button



Staffing Industry Report Webinar

Latest APAC Research Showcase



**Fiona
Coombe**
Director of
Legal &
Regulatory
Research



**Francesca
Vassallo-
Todaro**
Operations
Development
Specialist



**John
Nurthen**
Executive
Director
Global Research



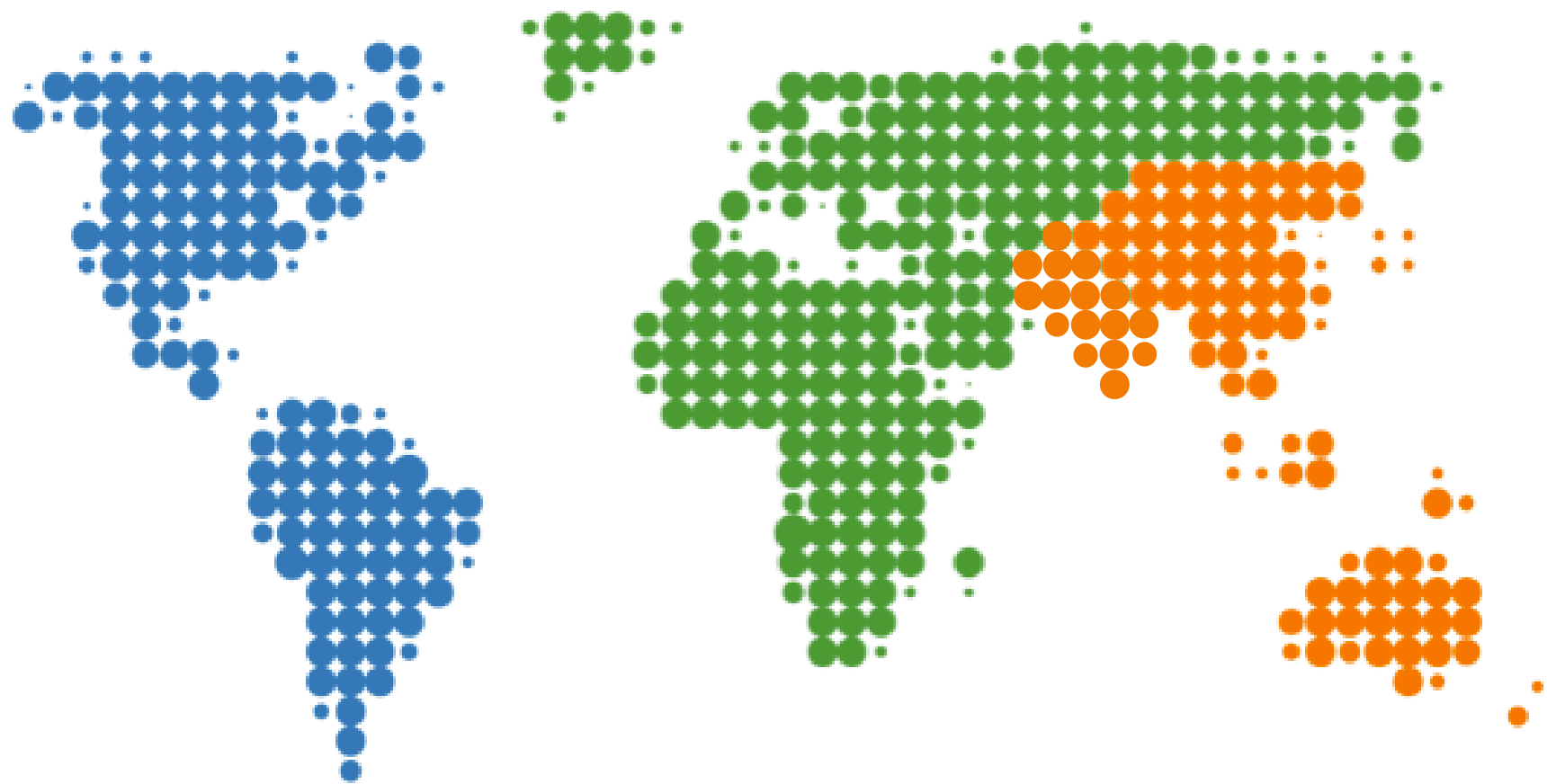
**Liz
Rennie**
Global Workforce
Solutions
Research Director

Our Regions

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EMEA

APAC



<http://lexicon.staffingindustry.com>

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The Lexicon

*The Global Language of the Workforce Solutions
Ecosystem*

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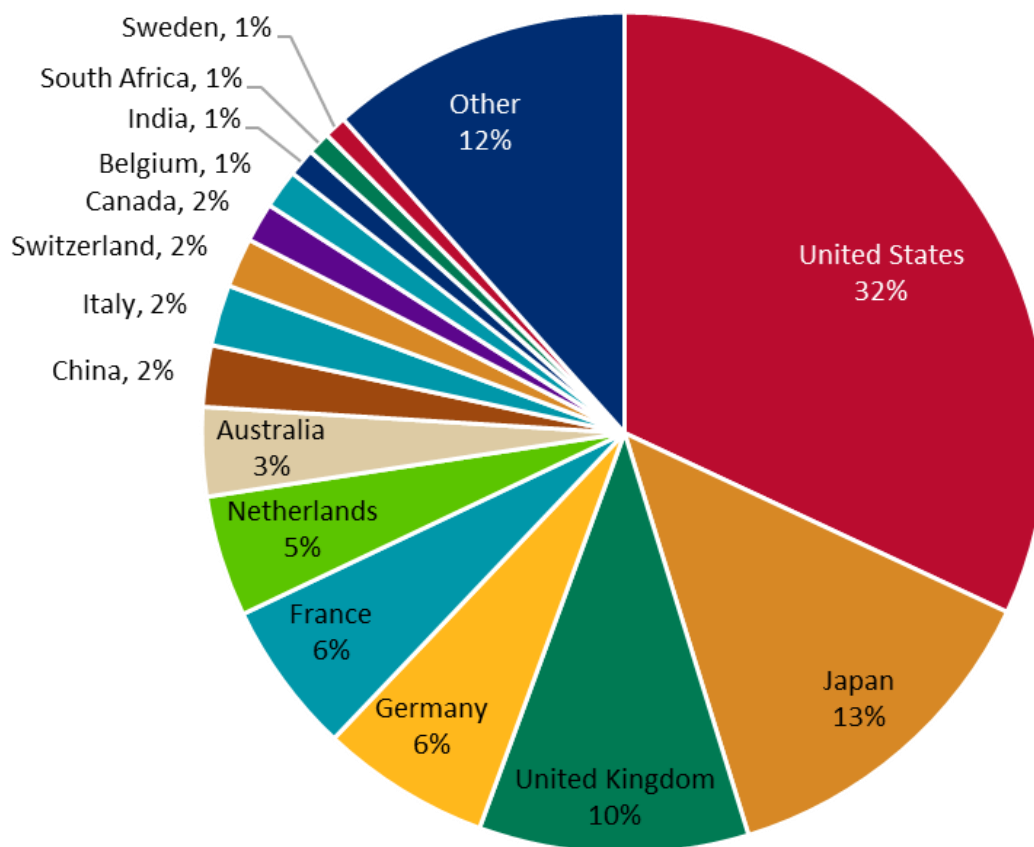
One of the major challenges facing professionals in the workforce solutions ecosystem is ensuring that a common language is used. Hence this Lexicon, established and maintained by Staffing Industry Analysts to help alleviate those issues. This is meant to be a living document and we encourage you to suggest additional terms or to submit corrections and clarifications to the existing set of definitions. Please send your suggestions to us at memberservices@staffingindustry.com.

Browse Lexicon: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Agenda

- Insights, Estimates and Growth Forecasts for the Fast-Growing APAC Markets
- Latest Legal Developments
- The Growth of MSP, VMS and RPO
- Customer Insights
- The Threat of Digital Disruption

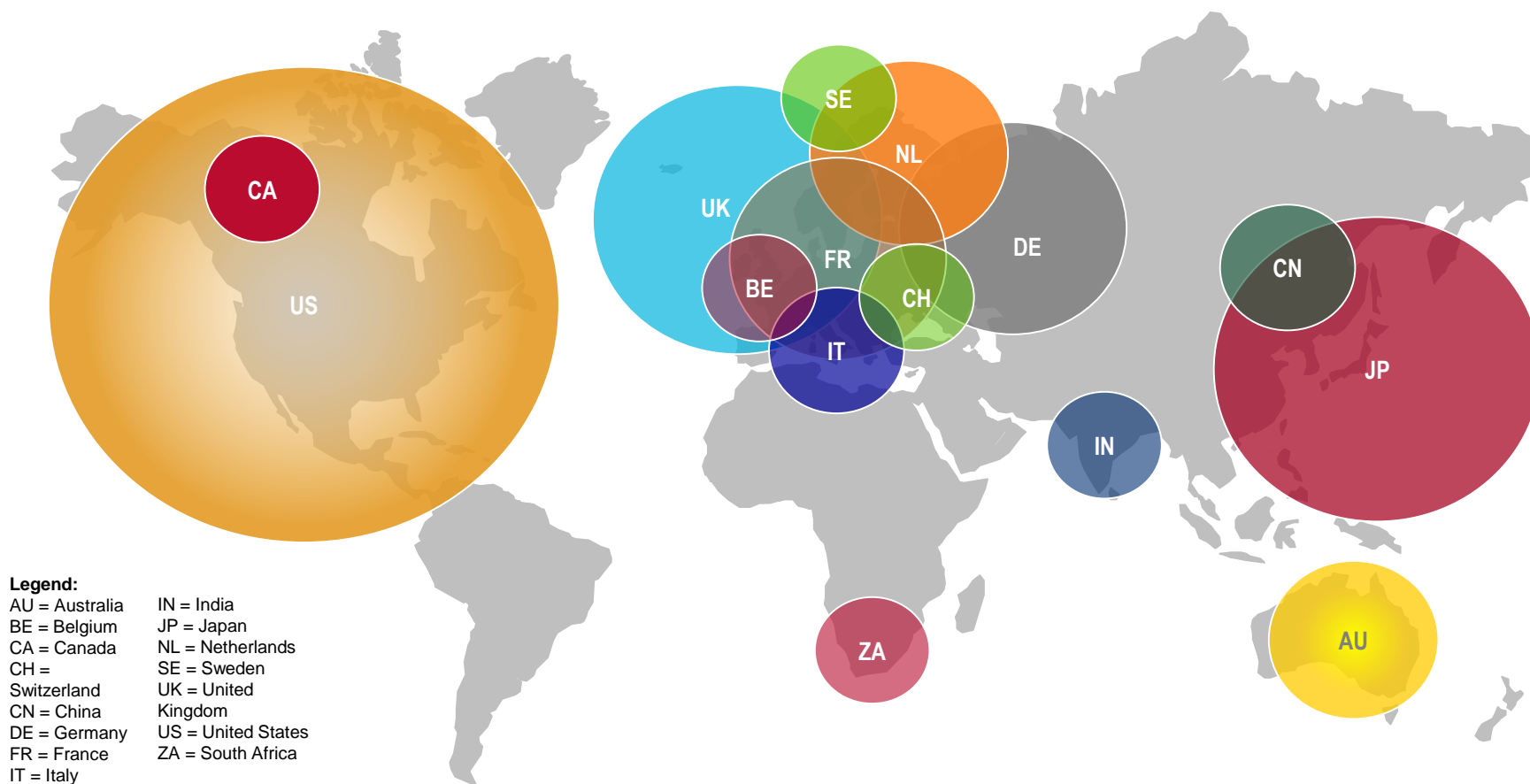
2016 Global Staffing Revenue by Country



2016 Global Staffing Revenue: USD 428 Billion

Source: Staffing Industry Analysts

Fifteen Largest Staffing Markets



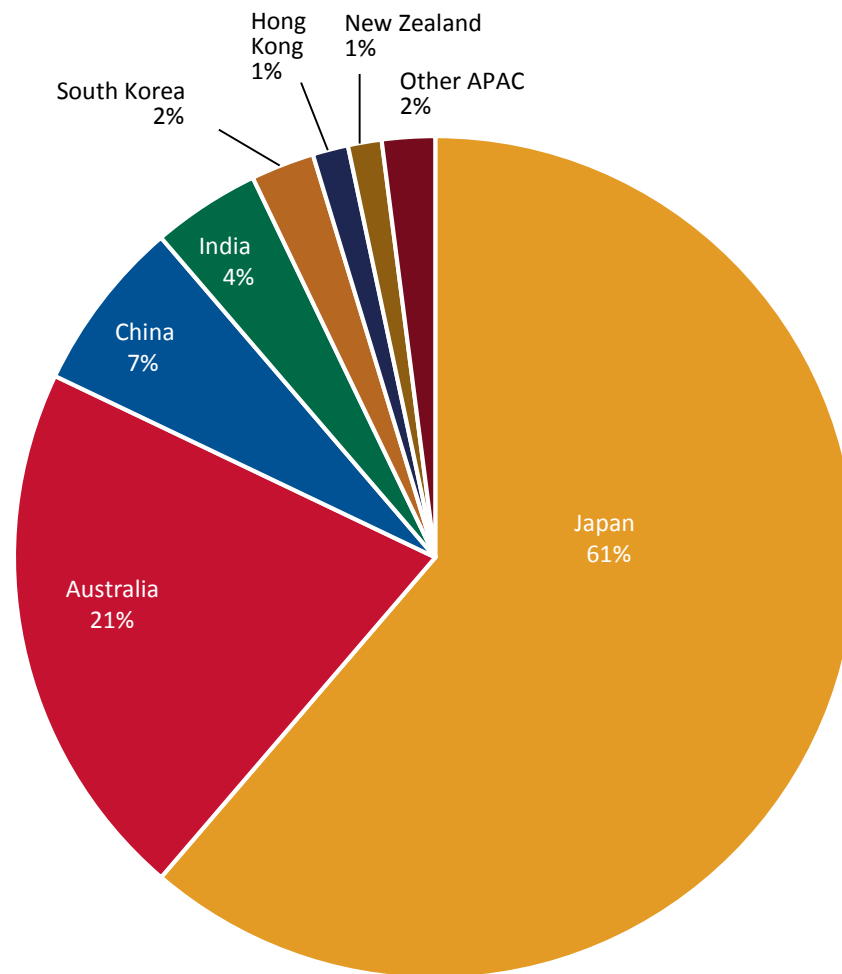
Source: Staffing Industry Analysts

Of Which Four are in APAC



Source: Staffing Industry Analysts

Asia Pacific Staffing Market USD 88B in 2016



Source: Staffing Industry Analysts

Most Attractive Staffing Markets

| | Country | Market Size | Protection of Permanent employees | Regulations on Temporary Agency Work | Ease of Doing Business | Economy (GDP 2017 - 2021) | Staffing Market Growth 2017 | Long Term Growth Potential | Market Competition | Political Stability | Higher Education & Training | 2017 score (2016 score) |
|---|-----------------|-------------|-----------------------------------|--------------------------------------|------------------------|---------------------------|-----------------------------|----------------------------|--------------------|---------------------|-----------------------------|-------------------------|
| | 1 Ireland | 6 | 6 | 9 | 9 | 5 | 6 | 7 | 7 | 9 | 9 | 73 (75) ↓ |
| | 2 Sweden | 7 | 7 | 9 | 10 | 4 | 7 | 7 | 3 | 10 | 8 | 72 (74) ↓ |
| | 3 Denmark | 5 | 6 | 8 | 10 | 3 | 9 | 8 | 1 | 10 | 9 | 69 (71) ↓ |
| | 4 Canada | 8 | 4 | 10 | 9 | 4 | 3 | 8 | 4 | 10 | 8 | 68 (71) ↓ |
| → | 5 Finland | 5 | 5 | 7 | 9 | 3 | 8 | 7 | 3 | 10 | 10 | 67 (66) ↑ |
| | - Malaysia | 3 | 2 | 10 | 9 | 8 | 8 | 10 | 3 | 7 | 7 | 67 (67) → |
| → | - Netherlands | 9 | 8 | 9 | 8 | 3 | 5 | 4 | 1 | 10 | 10 | 67 (67) → |
| | 8 New Zealand | 5 | 1 | 10 | 10 | 5 | 4 | 9 | 3 | 10 | 9 | 66 (66) → |
| | 9 Germany | 9 | 9 | 7 | 9 | 3 | 5 | 5 | 1 | 9 | 8 | 65 (68) ↓ |
| | - Italy | 9 | 8 | 6 | 7 | 2 | 3 | 8 | 9 | 7 | 6 | 65 (67) ↓ |
| → | 11 Australia | 9 | 6 | 9 | 9 | 5 | 2 | 3 | 2 | 10 | 9 | 64 (67) ↓ |
| → | - South Korea | 6 | 5 | 6 | 10 | 5 | 5 | 9 | 4 | 7 | 7 | 64 (68) ↓ |
| | - United States | 10 | 3 | 10 | 10 | 4 | 3 | 5 | 1 | 9 | 9 | 64 (66) ↓ |
| | 14 Austria | 6 | 7 | 7 | 9 | 3 | 2 | 6 | 4 | 10 | 9 | 63 (61) ↑ |
| → | - China | 9 | 9 | 6 | 5 | 9 | 10 | 2 | 4 | 4 | 5 | 63 (61) ↑ |
| | - Estonia | 2 | 6 | 4 | 9 | 5 | 4 | 8 | 8 | 9 | 8 | 63 (61) ↑ |
| → | - Japan | 10 | 6 | 9 | 8 | 2 | 5 | 5 | 1 | 9 | 8 | 63 (63) → |
| | - Lithuania | 3 | 6 | 4 | 9 | 6 | 4 | 10 | 6 | 8 | 7 | 63 (64) ↓ |
| | - Poland | 5 | 7 | 6 | 9 | 5 | 8 | 7 | 1 | 8 | 7 | 63 (63) → |
| | - Portugal | 5 | 6 | 6 | 9 | 3 | 8 | 6 | 5 | 8 | 7 | 63 (63) → |
| | - Switzerland | 8 | 7 | 9 | 8 | 3 | 2 | 6 | 1 | 10 | 9 | 63 (60) ↑ |

Higher Potential Lower Potential

Source: Staffing Industry Analysts

Growth in Largest Staffing Markets (2013-2016)

| Country | Staffing Revenue | | | | |
|----------------|----------------------|-----------|-----------|-------------------------|-------------------------|
| | 2016 USD Billions | 2016 Rank | 2013 Rank | 2013-2016 CAGR (NC)* | 2013-2016 CAGR GDP** |
| United States | 136.8 | 1 | 1 | 5.0% | 2.2% |
| Japan | 56.7 | 2 | 2 | 5.0% | 0.8% |
| United Kingdom | 44.1 | 3 | 3 | 6.4% | 2.4% |
| Germany | 27.7 | 4 | 4 | 6.3% | 1.6% |
| France | 25.0 | 5 | 5 | 3.7% | 1.0% |
| Netherlands | 19.9 | 6 | 6 | 8.0% | 1.8% |
| Australia | 14.6 | 7 | 7 | 1.1% | 2.6% |
| China | 10.1 | 8 | 12 | 22.2% | 7.0% |
| Italy | 10.0 | 9 | 10 | 12.8% | 0.6% |
| Switzerland | 8.1 | 10 | 11 | 3.2% | 1.4% |
| Canada | 6.5 | 11 | 9 | -0.2% | 1.6% |
| Belgium | 6.4 | 12 | 13 | 10.3% | 1.5% |
| India | 4.5 | 13 | 15 | 12.7% | 7.3% |
| South Africa | 3.8 | 14 | 14 | 0.7% | 1.1% |
| Sweden | 3.7 | 15 | 16 | 10.0% | 3.3% |
| Global | 427.6 | | | | |

*NC = National currency

**GDP based on constant prices in local currency

Source: International Monetary Fund and Staffing Industry Analysts

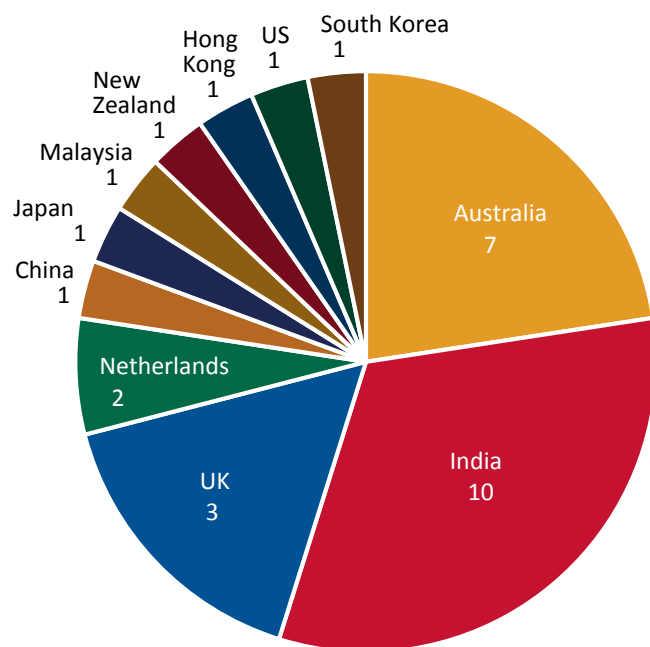
Staffing Market Estimates and Projections

| | Staffing Revenue Y/Y Change (NC) | | | Real GDP Growth | | |
|----------------|-------------------------------------|-------|-------|-----------------|-------|-------|
| | 2016 | 2017P | 2018P | 2016 | 2017P | 2018P |
| United States | 3% | 3% | 4% | 1.6% | 2.3% | 2.5% |
| Japan | 4% | 5% | 4% | 1.0% | 1.2% | 0.6% |
| United Kingdom | 4% | 3% | 1% | 1.8% | 2.0% | 1.5% |
| Germany | 6% | 7% | 7% | 1.8% | 1.6% | 1.5% |
| France | 7% | 8% | 7% | 1.2% | 1.4% | 1.6% |
| Netherlands | 9% | 7% | 6% | 2.1% | 2.1% | 1.8% |
| Australia | 3% | 2% | 2% | 1.2% | 1.6% | 1.5% |
| China | 18% | 16% | 16% | 6.7% | 6.6% | 6.2% |
| Italy | 9% | 14% | 15% | 0.9% | 0.8% | 0.8% |
| Switzerland | 1% | 2% | 4% | 1.3% | 1.4% | 1.6% |
| Canada | 0% | 4% | 3% | 1.4% | 1.9% | 2.0% |
| Belgium | 11% | 5% | 4% | 1.2% | 1.6% | 1.5% |
| India | 12% | 14% | 15% | 6.8% | 7.2% | 7.7% |
| South Africa | 7% | 10% | 12% | 0.3% | 0.8% | 1.6% |
| Sweden | 10% | 10% | 9% | 3.3% | 2.7% | 2.4% |

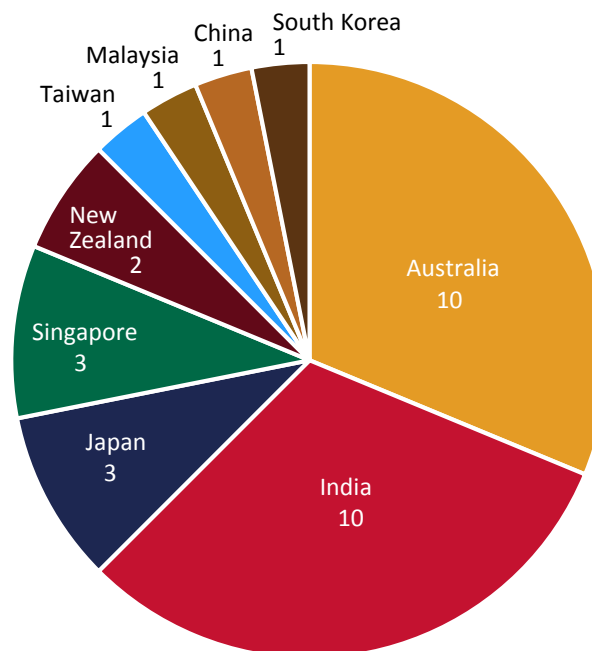
Source: International Monetary Fund and Staffing Industry Analysts

M&A in APAC since January 2017

APAC M&A Transactions by Location of Acquirer HQ since 2016



APAC M&A Transactions by Location of Target Firm HQ since 2016



Source: Staffing Industry Analysts

Our APAC 'Look Ats'.....



- Australia
- China
- Hong Kong
- India
- Japan
- Malaysia
- New Zealand
- Philippines
- Singapore
- South Korea
- Thailand

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- The Growth of MSP, VMS and RPO
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- The Threat of Digital Disruption

Legal Update

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LEGAL COMPLIANCE AND RISK



Asia Pacific Legal Update Q2 2017

11 July 2017

In this report, we round up the legal developments affecting the workforce solutions ecosystem in Asia Pacific in Q2

RESEARCH ANALYST

FIONA COOMBE



Fiona Coombe is Director of Legal and Regulatory Research and joined Staffing Industry Analysts' London office in July 2014. She is responsible for

Staffing Law Updates, regular reports on the latest legal developments of significance ...

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Australia



- Licensing for the labour hire industry
 - Queensland, Victoria and South Australia propose legislation
 - Black Economy Taskforce to report October 2017
<https://consult.treasury.gov.au/tax-framework-division/black-economy-taskforce/>
- Full implementation of new temporary skill shortage visa by March 2018, to replace 457 visa
- New data breach notification law: effective date to be announced
 - 30 days notice to Australian Information Commissioner and affected individuals

Japan



- Equal pay for dispatch workers
 - Action Plan for the Realisation of Work Style Reform also introduces overtime limits
- Tighter regulations for transfer and collection of personal data
 - Amended Act on the Protection of Personal Information effective 30 May 2017 to cover all employers
 - Introduced “special care-required personal information” and rules for opt-outs

Philippines

- New guidelines governing contracting and sub-contracting
 - Department Order No. 174
 - Identifies two types of prohibited labour-only sub-contracting
 - Increase in registration fee to PHP 100,000 (USD 1,954)
 - Increased capitalisation requirement PHP 5 million (USD 97,734)



Legal Research Q2 2017 APAC Region


LEGAL UPDATE PRINT

ASIA PACIFIC LEGAL UPDATE Q2 2017 🔒

11 July 2017 📧 Email 📄 G+ 📱 f 📱 t 📱 in

In this report, we round up the legal developments affecting the workforce solutions ecosystem in Asia Pacific in Q2 2017:

- Australia: Licensing for the labour hire industry; National minimum wage increases from 1 July; New temporary skill shortage visa to replace 457 visa; Payroll provider accessorially liable for employer's contravention of award
- China: New policy on employment of foreigners
- Japan: Overtime regulations strengthened plus equal pay for dispatch workers; Extension of child care leave; Tighter regulations for transfer and collection of personal information
- Philippines: New guidelines governing contracting
- Vietnam: New mandatory work permit system



FIONA COOMBE, CCWP
Director, Legal & Regulatory Research
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- [Asia Pacific Legal Update Q2 2017](#)
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- [Asia Pacific Legal Update Q1 2017](#)
- [2017 Legal Calendar Asia Pacific](#)

BRIEFING PRINT

A LOOK AT THE WORKFORCE ENVIRONMENT IN CHINA

June 28, 2017 📧 Email 📄 G+ 📱 f 📱 t 📱 in

Key Findings

- China is not a single market. There are vast differences between cosmopolitan provincial capitals and smaller cities, and even urban markets in the same province can differ in language, age, geography and industry.
- New provisional regulations, the Interim Provisions on Labour Dispatch, were issued by the Ministry of Human Resources and Social Security on 24 January 2014 and took effect from 1 March 2014.
- A labour dispatch company must have permanent business premises and facilities that are suitable for the conduct of their business. The registered capital of the company must be at least RMB2,000,000 (USD 293,000).
- A significant recent development is the Cybersecurity Law, which was passed on 7 November 2016 and comes into force on 1 June 2017.
- A new Work Permit Policy commenced nationwide on April 1, 2017.



WHY THIS MATTERS

This report provides an overview of the compliance issues that contingent workforce buyers and foreign staffing providers should know when engaging and

To download a copy of this report click below:

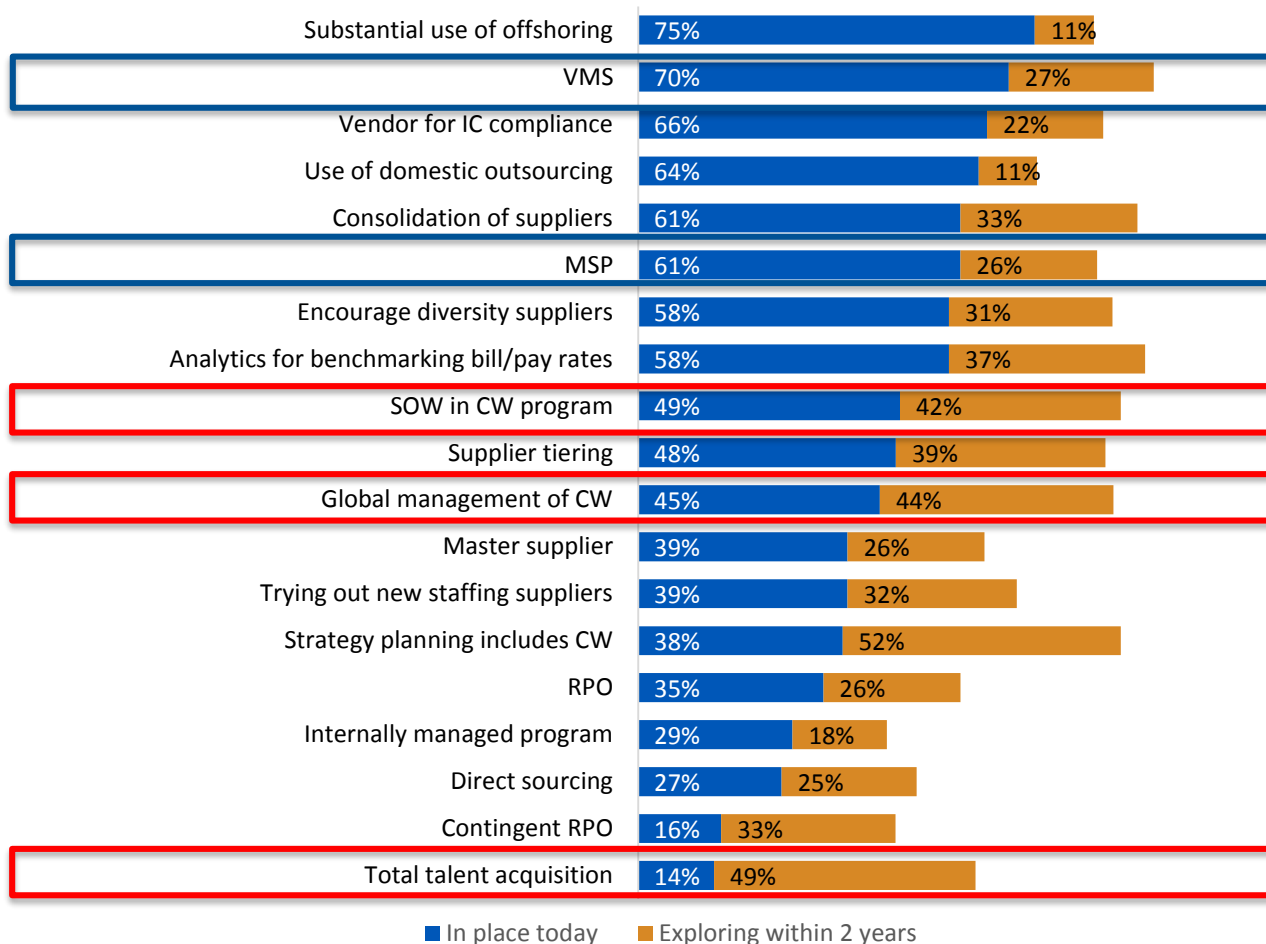
2017 Legal Calendar Asia Pacific STAFFING INDUSTRY ANALYSTS

| Jurisdiction | Category | Changes in 2017 | Date of Change |
|--------------|----------------|---|-----------------------------|
| Australia | Immigration | Changes to the Working Holiday Makers Scheme include increasing the upper age limit to 35, cutting the visa fee from AUD 440 to AUD 390 and permitting extended employment. | Effective 1 January 2017 |
| | Annual leave | The Fair Work Commission varied some Modern Awards to permit employees to tell their employer they will take excessive annual leave already accrued. | Effective from 29 July 2017 |
| China | Cyber security | The National People's Congress Standing Committee has finalised the Cyber Security Law ("CSL"), placing obligations on "cyber service providers" including employers handling electronic employee data. | Effective 1 June 2017 |
| | Labour law | The Labour Protection Supervision Regulations establish a new ranking system, a system of public announcements, and a system for random inspections for enforcement of PRC labour law. | From 1 January 2017 |

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- The Threat of Digital Disruption

Which of the following are currently in place in your organisation, or are likely to be seriously explored within two years?

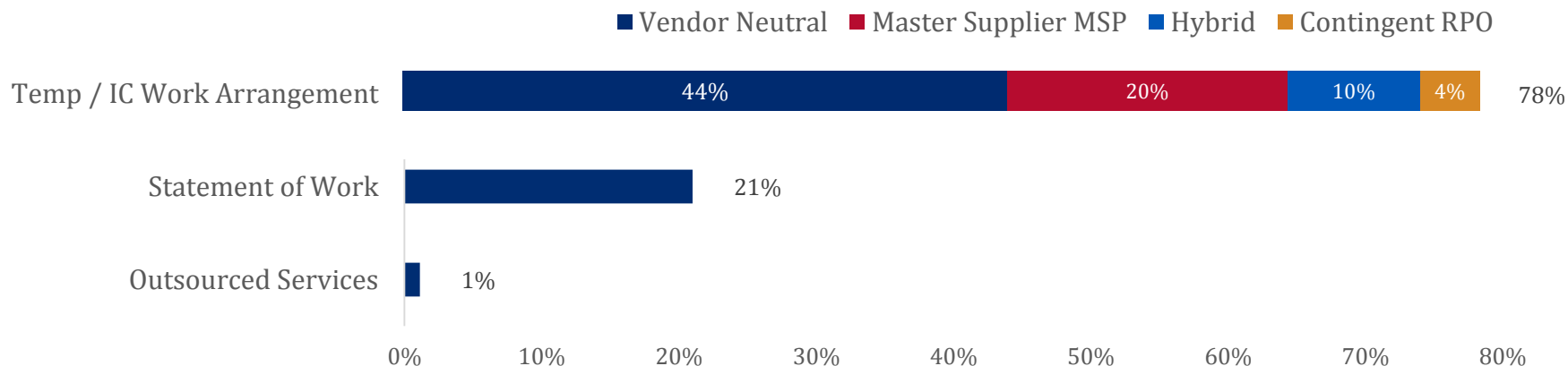


N = 66

Source: WF Solutions Buyers Survey 2016 – Asia Pacific - Cumulative Report 2017.03.24

Work Arrangements

Vendor Neutral is the most common model, but SOW now represents 21% of the market share

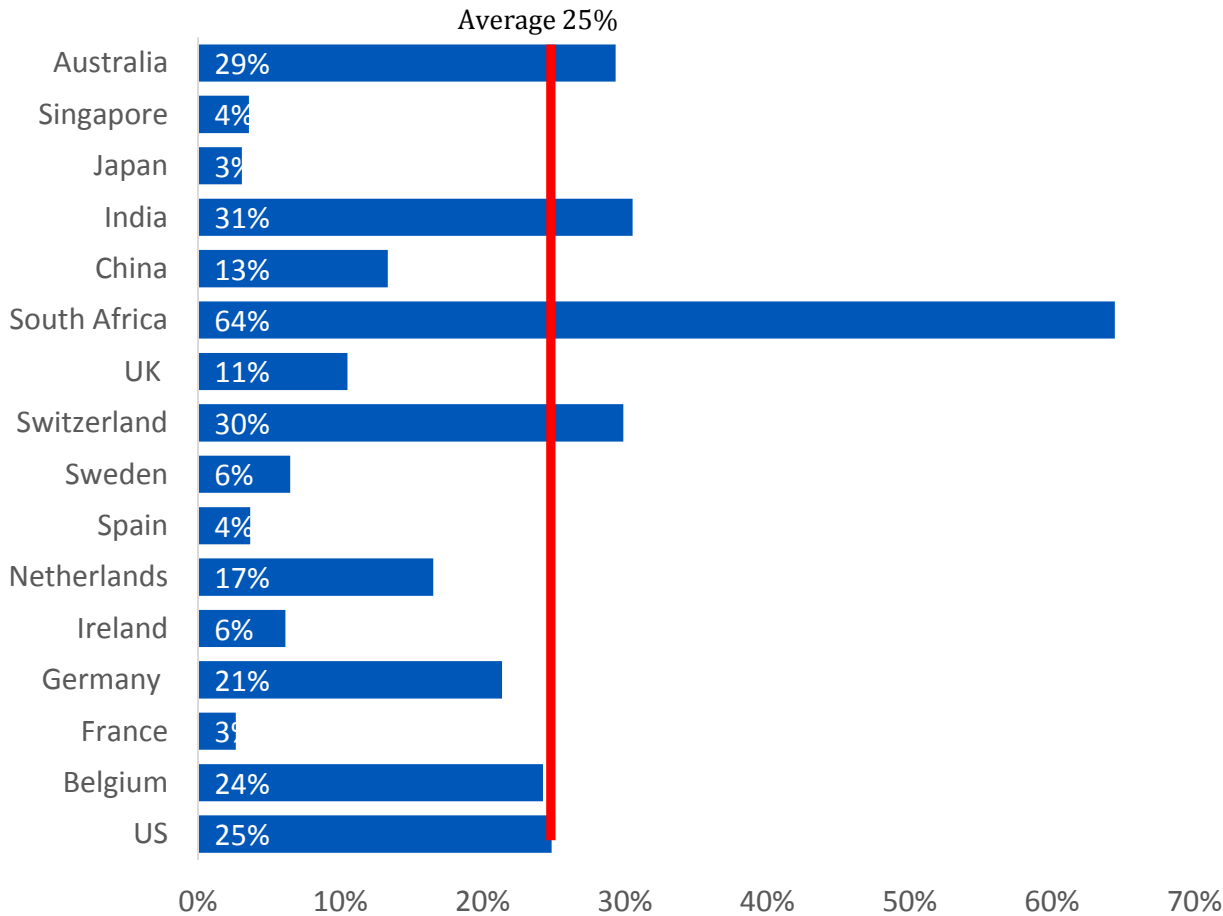


N=23

Source: MSP Market Developments - Part 2 20170831

SOW in CW Programs

Share of MSP SOW Spend as a proportion of MSP Spend in country (2016)

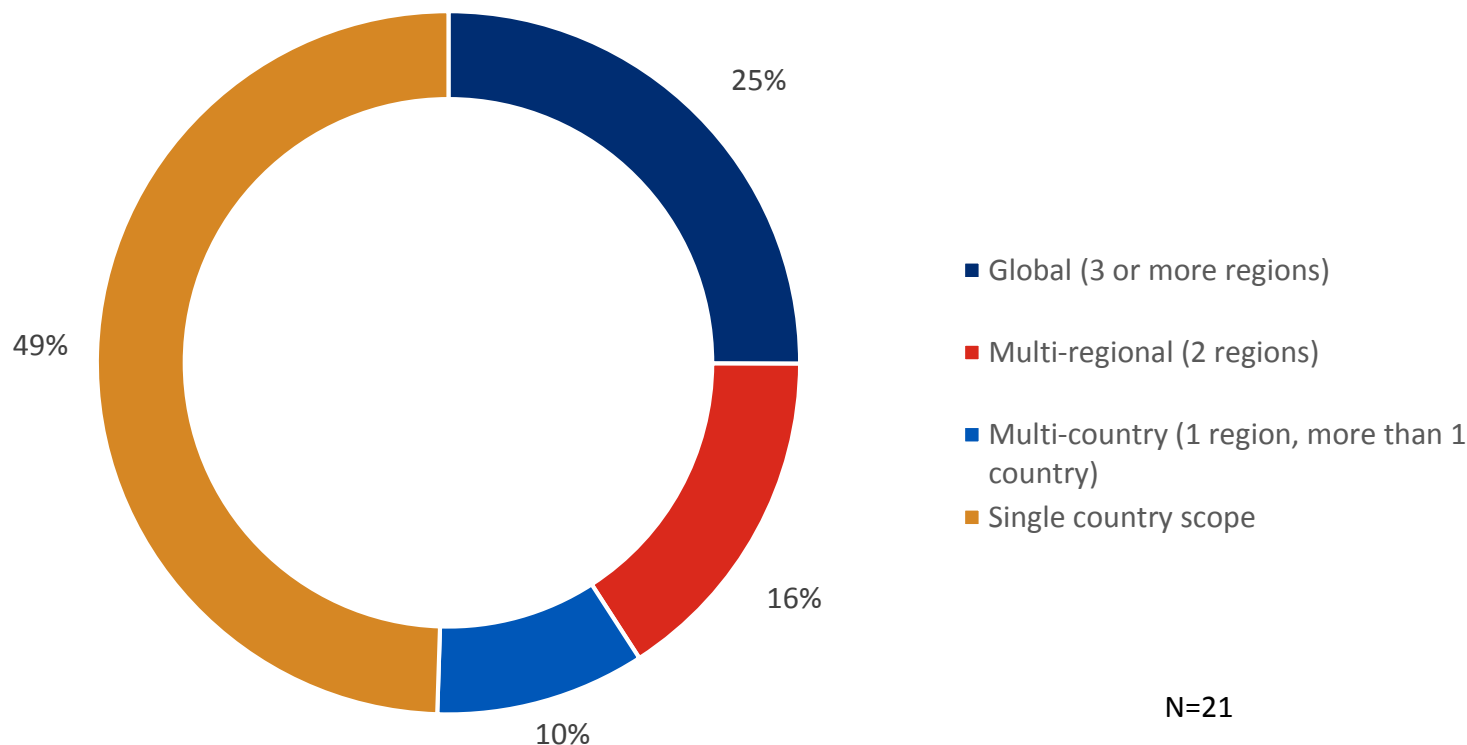


N=25

Source: SOW Maturity by Geography June 2017

Global Management of CW

Program expansions have been driving MSP market growth, with providers in more countries than before and investing in regional centres of expertise

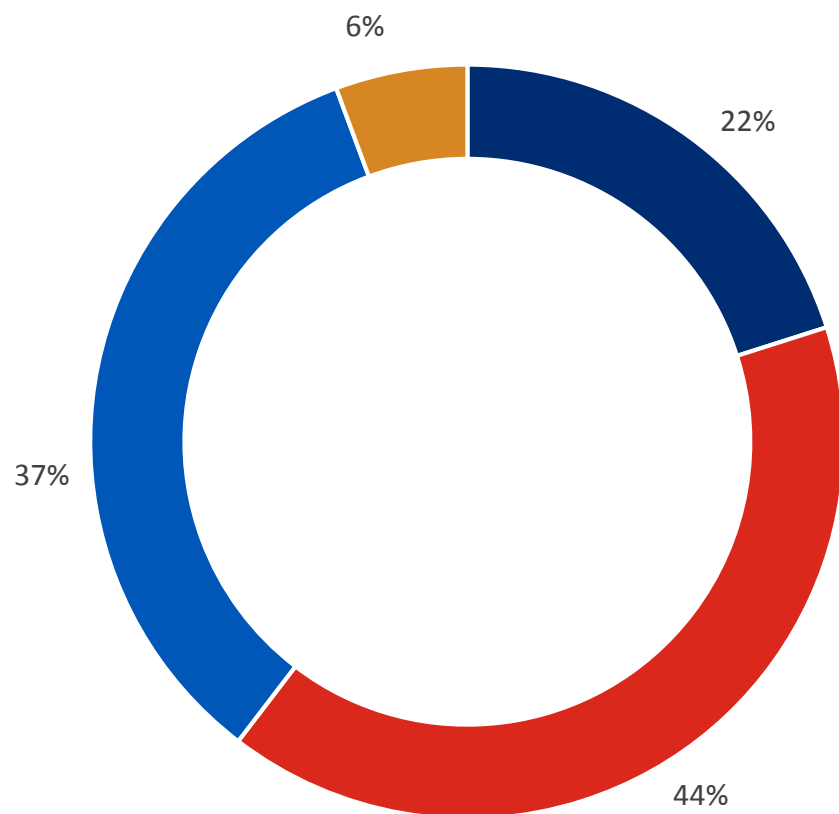


N=21

Source: MSP Market Developments - Part 2 August 2017

Total Talent Acquisition

Estimated 300-400 contracts globally



- Single MSP and RPO contract with single account governance, however different delivery teams (only)
- Single governance team and blended delivery team where hiring manager has a single TA business partner for contingent & permanent needs
- Blended MSP, RPO service contracts (A or B above) that also have SOW and IC in scope of MSP services
- Total Workforce Planning Consulting Only (where none of the above apply)

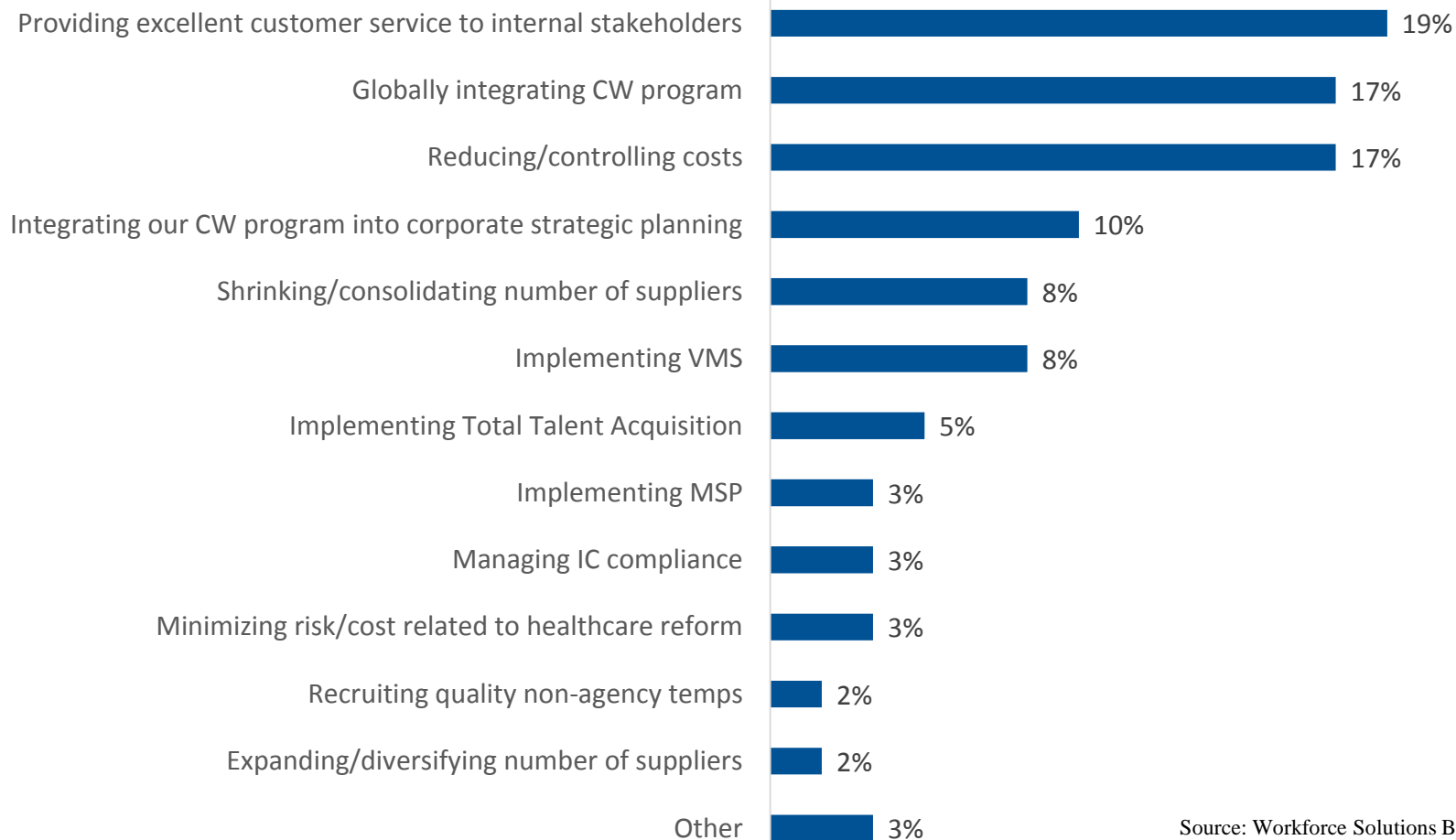
Source: Total Talent Acquisition Market Developments June 2017

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Buyers Survey Insights – Top Priorities

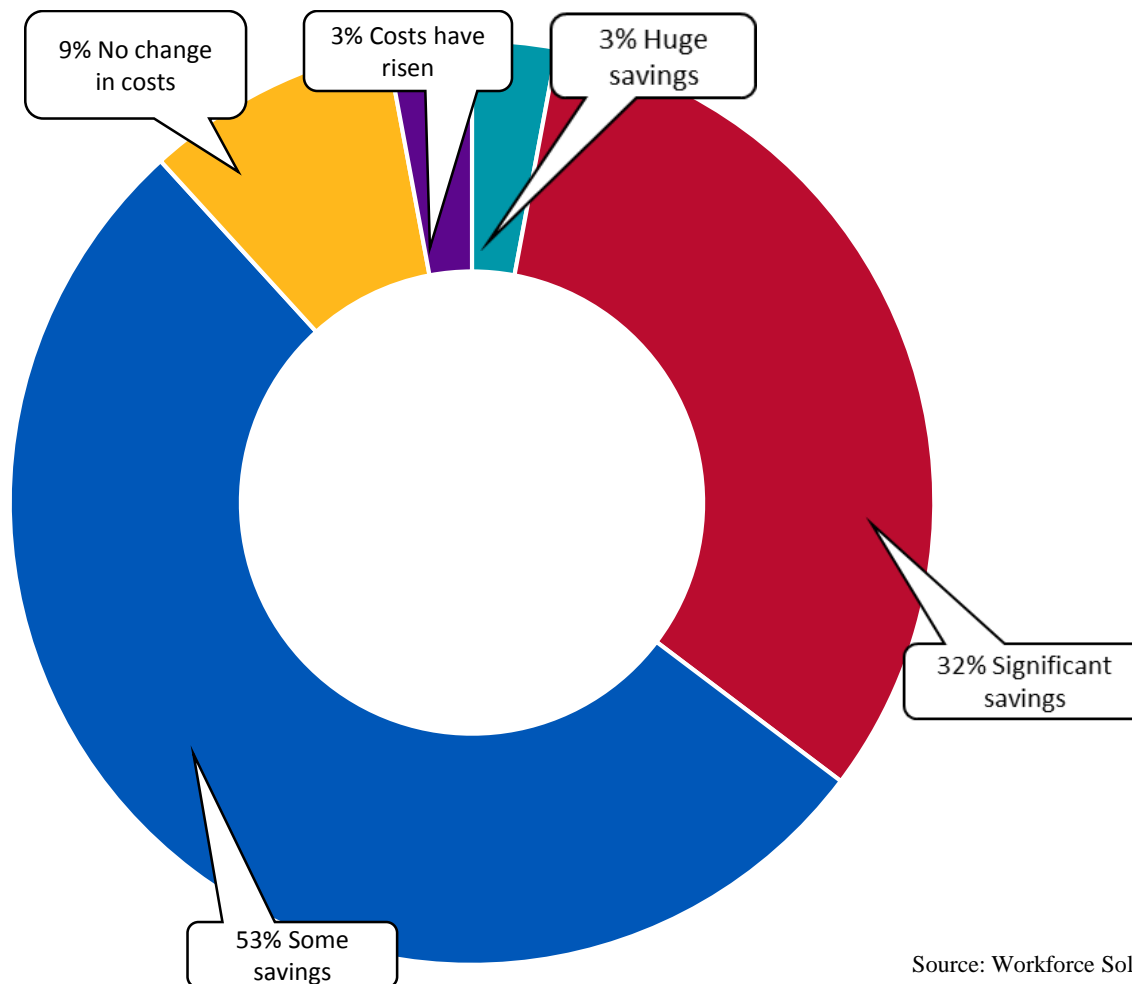
Which of the following is the top priority for your organization's contingent workforce program in 2016?



Source: Workforce Solutions Buyers Survey

Buyers Survey Insights – MSP/VMS

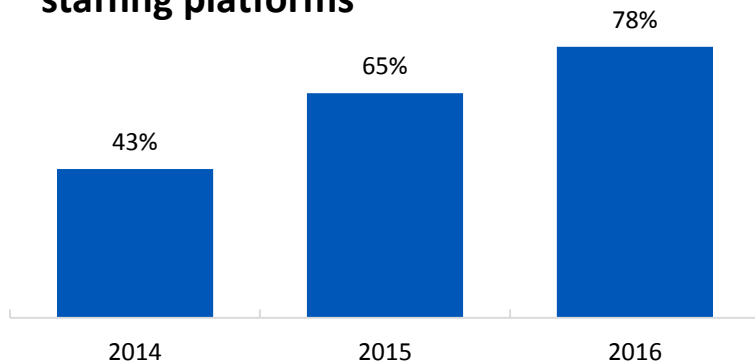
Distribution of responses regarding cost impact of using an MSP



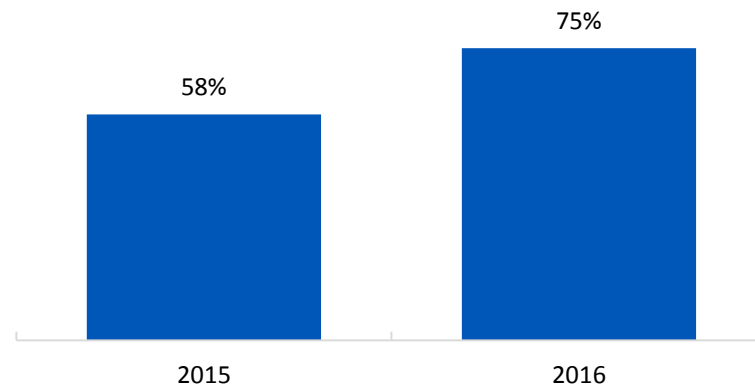
Source: Workforce Solutions Buyers Survey

Buyers Survey Insights – Technology Trends

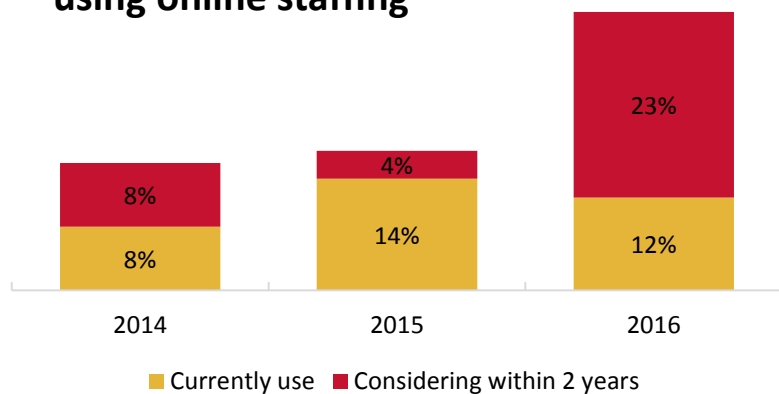
Percent of buyers familiar with online staffing platforms



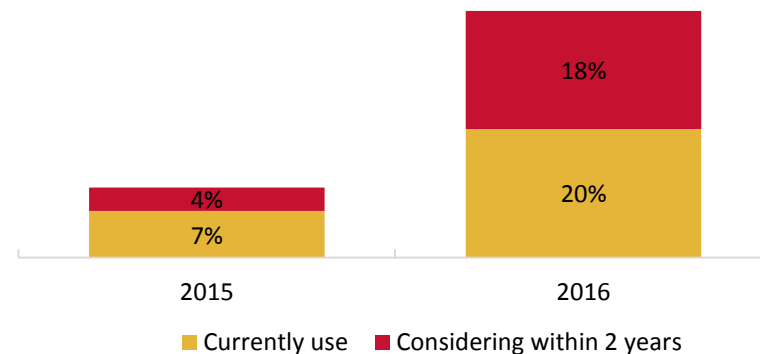
Percent of buyers familiar with FMS



Percent of buyers using or considering using online staffing



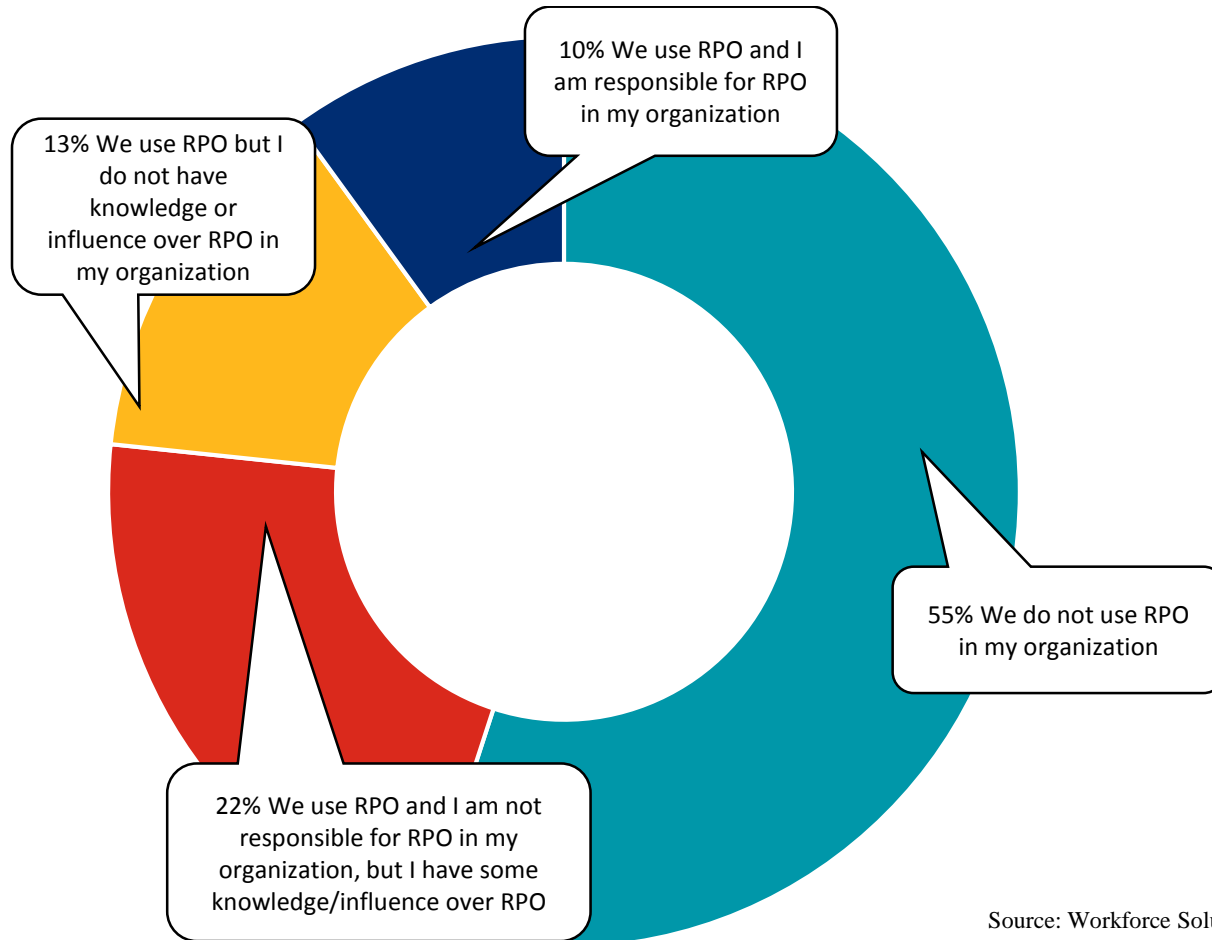
Percent of buyers using or considering using FMS



Source: Workforce Solutions Buyers Survey

Buyers Survey Insights – RPO

With regard to RPO, please select the most applicable statement regarding your responsibilities



Source: Workforce Solutions Buyers Survey

Buyer Surveys – Further Analysis

Asia Pacific/Latin America/
Middle East & Africa

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Workforce Solutions Buyers Survey Internal Resources Dedicated to Contingent Workforce Management

March 2, 2017
Timothy Landhuis, Research Manager
tlandhuis@staffingindustry.com

Market Information and Forecasts

Asia Pacific/Latin America/
Middle East & Africa

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Workforce Solutions Buyers Survey 2016 Full 2016 Report & Cumulative Appendix of 2014-2015 Results

March 24, 2017
Timothy Landhuis, Research Manager
tlandhuis@staffingindustry.com

Market Information and Forecasts

Asia Pacific/Latin America/
Middle East & Africa

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Workforce Solutions Buyers Survey Strategies to mitigate contingent workforce legal risk

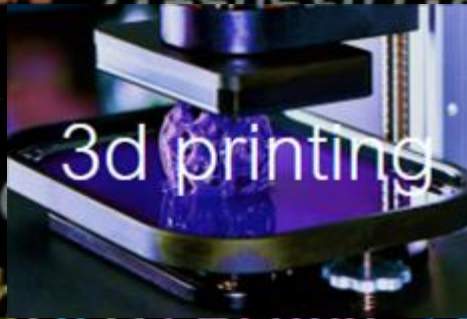
March 10, 2017
Timothy Landhuis, Research Manager
tlandhuis@staffingindustry.com

Market Information and Forecasts



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3d printing



self-driving car



big data



cloud computing



blockchain



nano technology



artificial intelligence



genetics



virtual reality



robotics



quantum computing



the internet of things

Jobs That Will Be Destroyed

| | |
|---------------------|--|
| Office Clerical | Cargo and Freight Agent, Data Entry Keyer, Telemarketer, Brokerage Clerk, Order Clerk |
| Industrial | Photographic Process Worker, Processing Machine Operator, Hand Sewer, Driver/Sales Worker, Etcher and Engraver, Packaging and Filling Machine Operator |
| IT | Computer Support Specialist |
| Healthcare | Dental Laboratory Technician, Ophthalmic Laboratory Technician, Pharmacy Technician, Medical Records and Health Information Technician, Medical and Clinical Laboratory Technologist |
| Finance/ Accounting | Insurance Underwriter, Tax Preparer, Bookkeeper, Accounting, and Auditing Clerk, Claims Adjuster, Examiner and Investigator, Credit Analyst |
| Engineering/Design | Surveying and Mapping Technician, Excavating and Loading Machine and Dragline Operator, Service Unit Operator, Geological and Petroleum Technician, Pump Operator |
| Legal | Title Examiner, Abstractor and Searcher, Paralegal, Legal Assistant |
| Clinical/Scientific | Environmental Science and Protection Technician, Health Social Science Research Assistant, Geoscientist, Life, Physical, and Social Science Technician, Chemical Technician |
| Marketing/Creative | Broadcast Technician, Market Research Analyst, Marketing Specialists, Camera Operator, Audio and Video Equipment Technician, Demonstrator and Product Promoter |
| Education | Teaching Assistant |

Source: Frey & Osborne, Staffing Industry Analysts

Jobs That Will Be Created

| | |
|---------------------|--|
| Office Clerical | - |
| Industrial | Self-Driving Truck Security Guard |
| IT | Avatar Manager, Waste Data Manager, 3D Food Printing Engineer, Digital Death Manager, Automation Ethicist, |
| Healthcare | Clinical Cytogeneticist, Genetic Counsellor, Memory Augmentation Surgeon, Child Designer, Organ Agent, |
| Finance/ Accounting | Crypto-Currency Banker, Blockchain Administrator |
| Engineering/Design | Space Miner, Exobiologist, Space Clinician, Space Junk Recycler, Autonomous Vehicle Engineer, Smart City Planner |
| Legal | Social Media Lawyer, 3D Copyright Specialist, Legal Management Consultant |
| Clinical/Scientific | Biomedical Engineer, Nanotechnologist, Synthetic Biologist |
| Marketing/Creative | Augmented Reality Architect, Online Image Improver, Social Media Manager, Hologram Designer |

Source: University of Kent, Thomas Frey, MIT Sloan and Staffing Industry Analysts

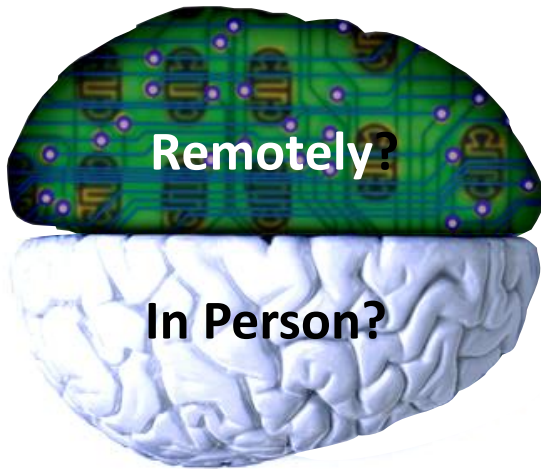
Existing Jobs Facing Increased Demand

| | |
|---------------------|--|
| Office Clerical | Sales Representative, Sales Manager, Business Development Manager, Market Research Analyst |
| Industrial | Carpenter, Joiner, Bricklayer, Electrician, Robot Operator/Mechanic, Solar Photovoltaic Installer |
| IT | Software Developer, Web Developer, App Developer, Cyber Security Consultant, Digital Marketer |
| Healthcare | Nurse, Care Worker, Plastic Surgeon, Occupational Therapist, Prosthetic Designer, Physiotherapist, Dentists |
| Finance/ Accounting | Financial Project Manager, Financial Advisor, Online Banking Specialist, Information Security Specialist |
| Engineering/Design | Architect, Deep Sea Miner, Hydrologist, Wind Turbine Technician, Astronaut, Diagnostic Technician |
| Legal | Litigation Director, Commercial Lawyer, IP Specialist, Lease Administrator |
| Clinical/Scientific | Geneticist, Epidemiologist, Food Technologist, Biomedical Engineer |
| Marketing/Creative | Online Merchandiser, Game Designer, Creative Director, SEO Consultant |
| Education | All teaching roles |
| Other | Personal Fitness Trainer, Dietician, Nutritionist, Image Consultant, Tattoo Artist, HR Manager, Police Officer |

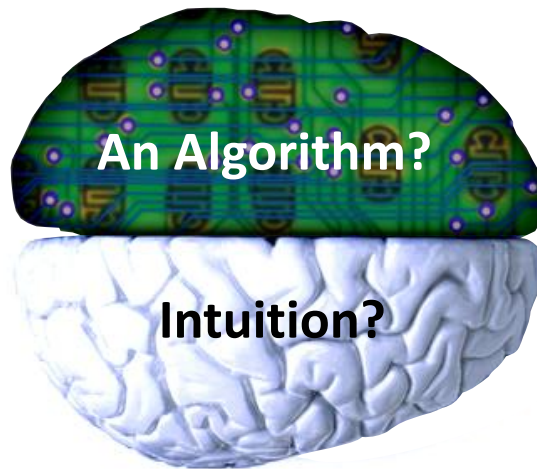
Source: University of Kent, Thomas Frey, MIT Sloan and Staffing Industry Analysts

Brain Power vs. Machine Power

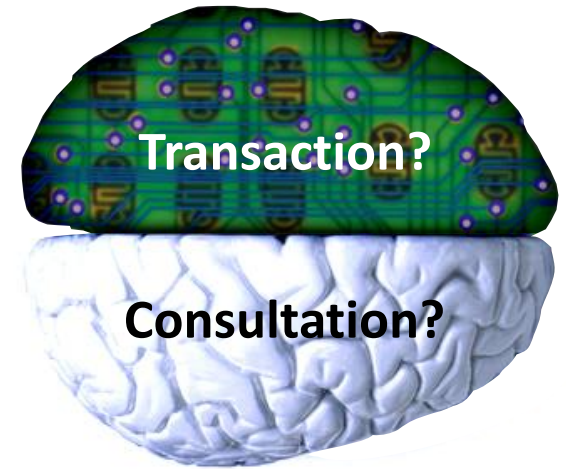
Is the work best conducted...



Can you rely on...

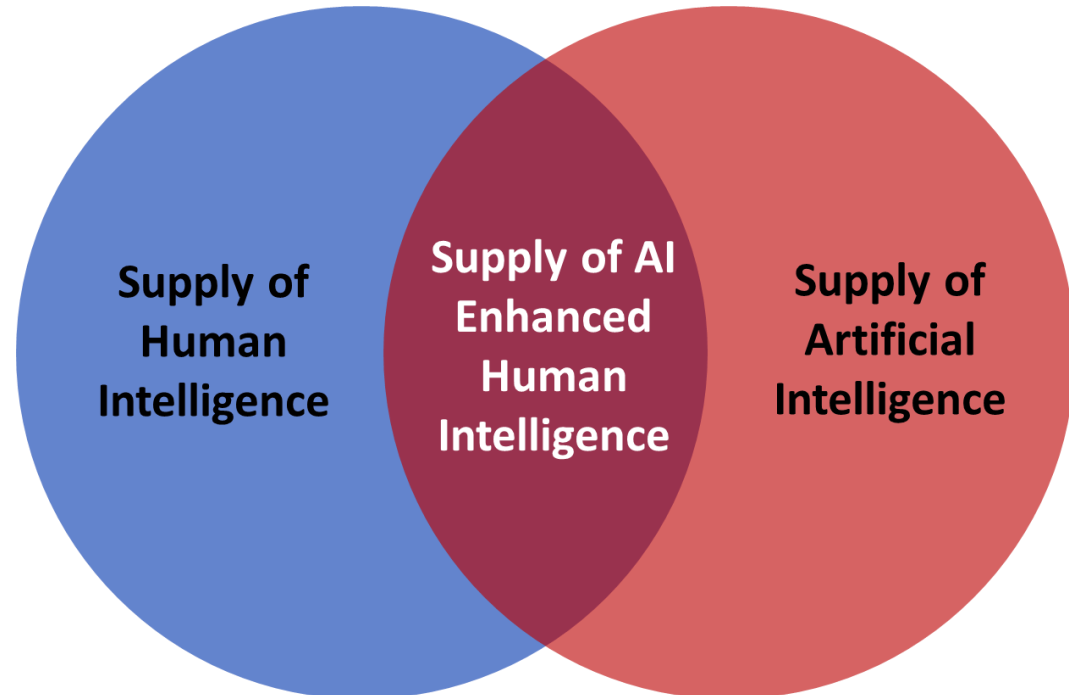


Are you buying a...



Running with the Machines

- AI/automation harnessed to develop broader and better staffing services?



Running with the Machines

- Supply of AI Enhanced Human Intelligence
 - Work Fusion

- Supply of Artificial Intelligence/Robotics
 - IPSoft
 - Robots of London
 - HOBII
 - Knightscope

- Initiatives using Blockchain
 - Chronobank.io
 - Hirematch.io

Any Questions?

Contact a Research Analyst

fcoombe@staffingindustry.com

fvassallo@staffingindustry.com

jnurthen@staffingindustry.com

erennie@staffingindustry.com

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