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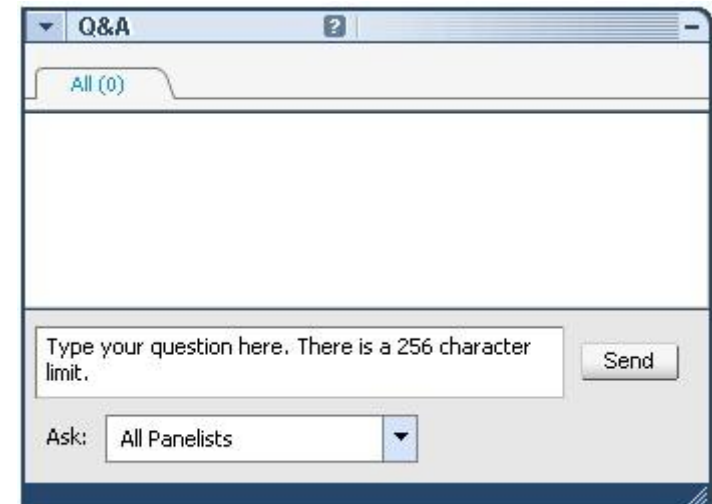
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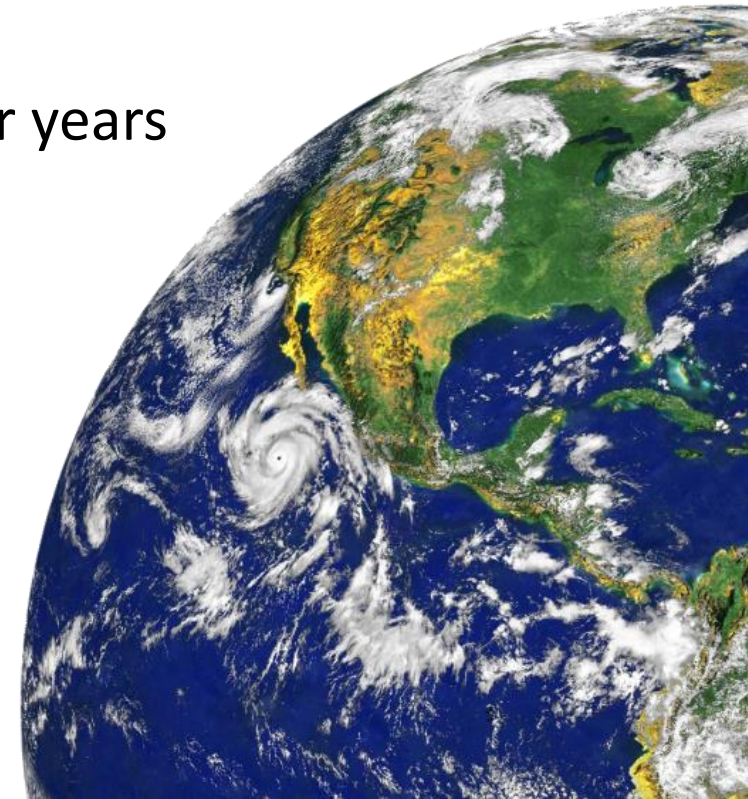
erennie@staffingindustry.com

Agenda

- Staffing Trends 2018
- Most Attractive Staffing Markets in APAC
- Staffing Forecasts APAC
- Australian Overview
- APAC Legal Trends
- VMS/MSP/RPO in APAC

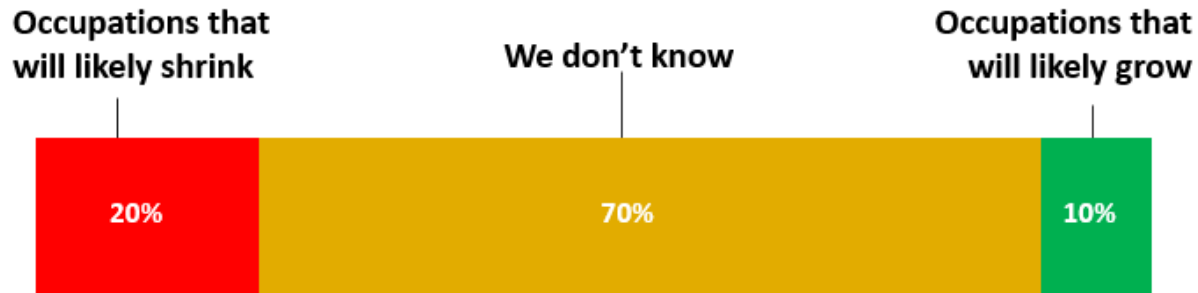
The Global Economy – it's Doing OK

- IMF has global GDP forecast of 3.7% in 2018 with improved GDP in Australia, France, India, South Africa, Switzerland and the US
- But....
 - Growth in Asia has been faster in prior years
 - UK facing Brexit
 - Threat of international trade war



Technology/Automation – The Robots are Coming

Susceptibility of occupations to be replaced through automation

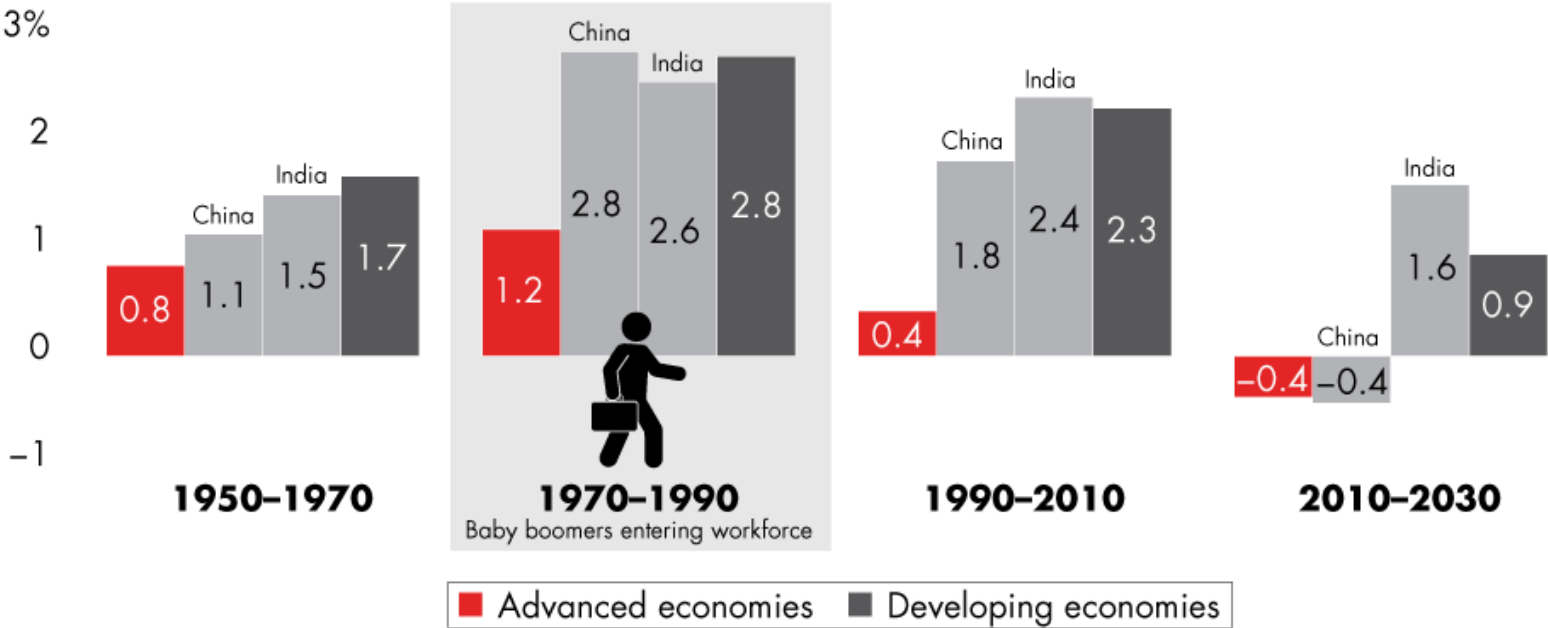


Source: The Future of Skills, Oxford Martin School, 2017

Skills Shortages – Where Have all the People Gone?

Baby boomers powered worldwide labour force growth, but this is slowing

Annual growth in population ages 25–54

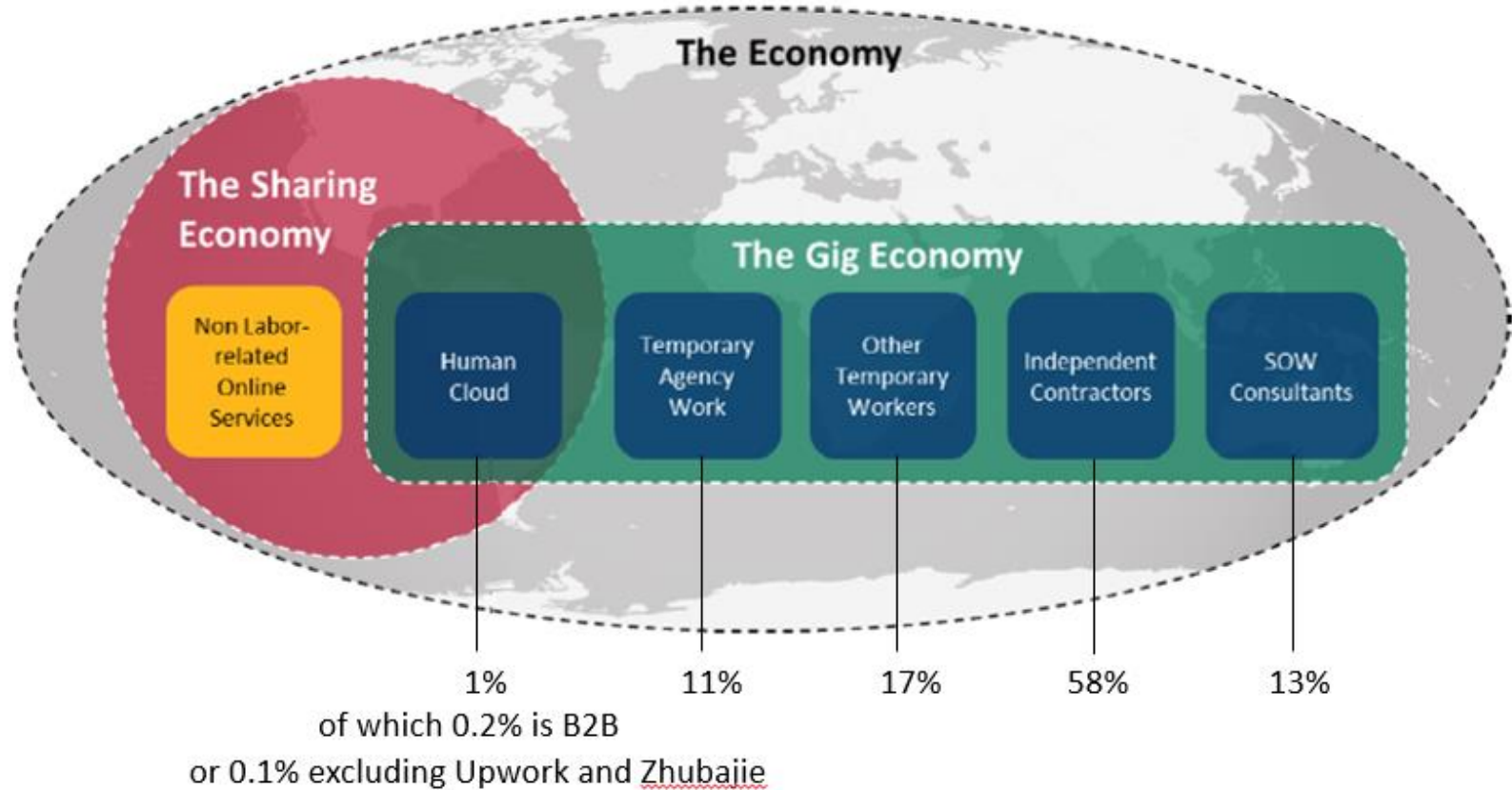


Notes: Advanced economies include the US, Western Europe, Canada, Australia, New Zealand and Japan; developing economies include all other countries, excluding least-developed countries as defined by the UN

Source: UN Population Division, Bain Macro Trends Group 2017

The Gig Economy – Keeping it in Proportion

Segments of the \$3.5 Trillion Global Gig Economy



Source: Staffing Industry Analysts

Public Perception

WIRED

Technology | Science | Culture | Video | Reviews | Magazine

The gig economy is being fuelled by exploitation, not innovation

The death of a DPD courier is the brutal end-game for the gig economy's faux innovation

CITYA.M. ☰

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Wednesday 7 February 2018 12:05am

Government to scrutinise employment status after rise of gig economy with Uber and Deliveroo

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The New York Times



Turnstile Jumping Pits de Blasio Against Police Reformers



Couple Stabbed to Death in Possible Robbery Outside Brooklyn Home, Police Say



'Are You an Honest Man?' Witness Is Asked in Corruption Trial. 'I Am Today.'

N.Y. / REGION

A Driver's Suicide Reveals the Dark Side of the Gig Economy

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Big City

By GINIA BELLAFANTE FEB. 6, 2018



REUTERS

World

Business

Markets

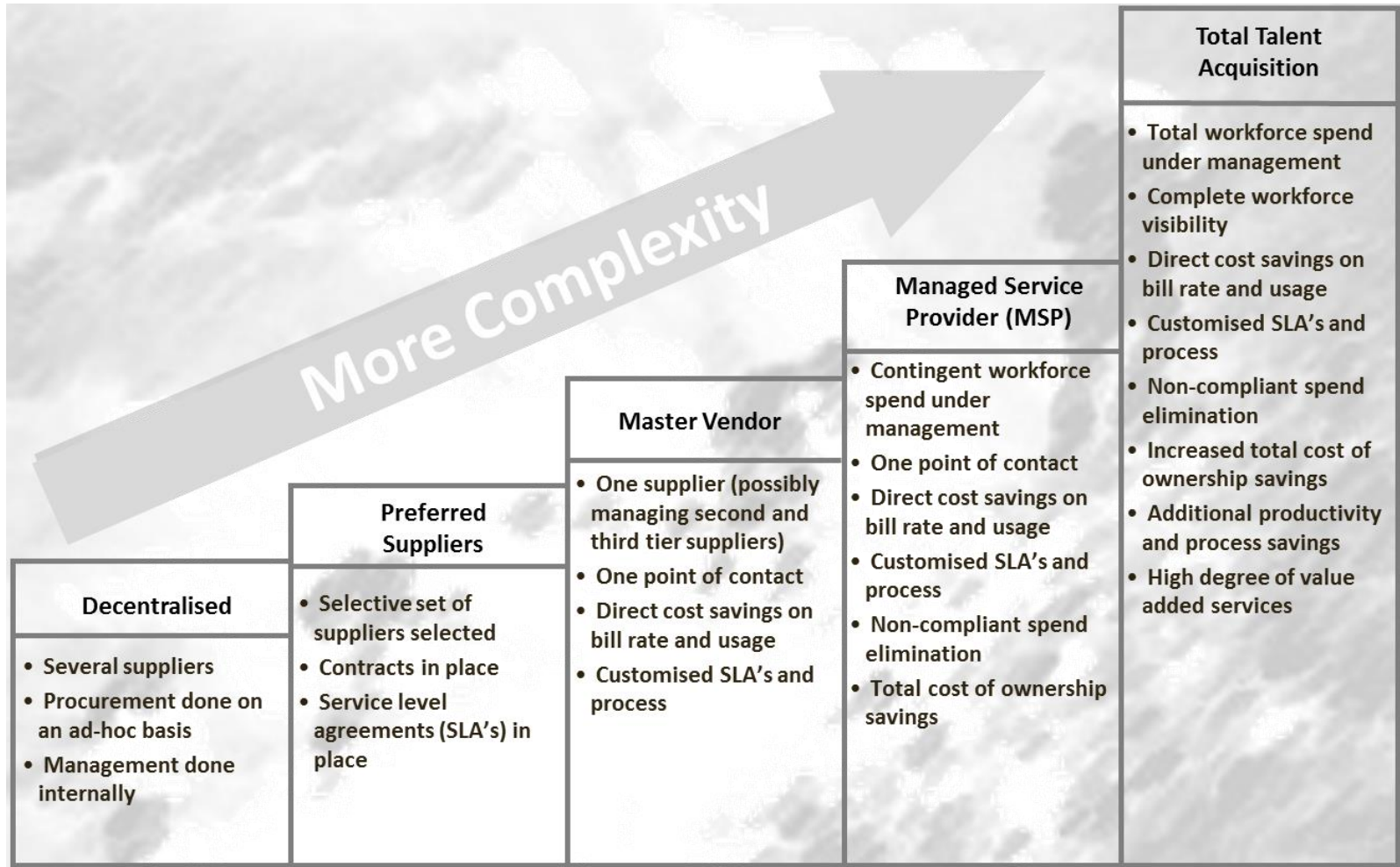
Politics

TV

#WORLD NEWS APRIL 11, 2017 / 9:55 AM / 10 MONTHS AGO

France's gig economy creates hope and tension as election looms

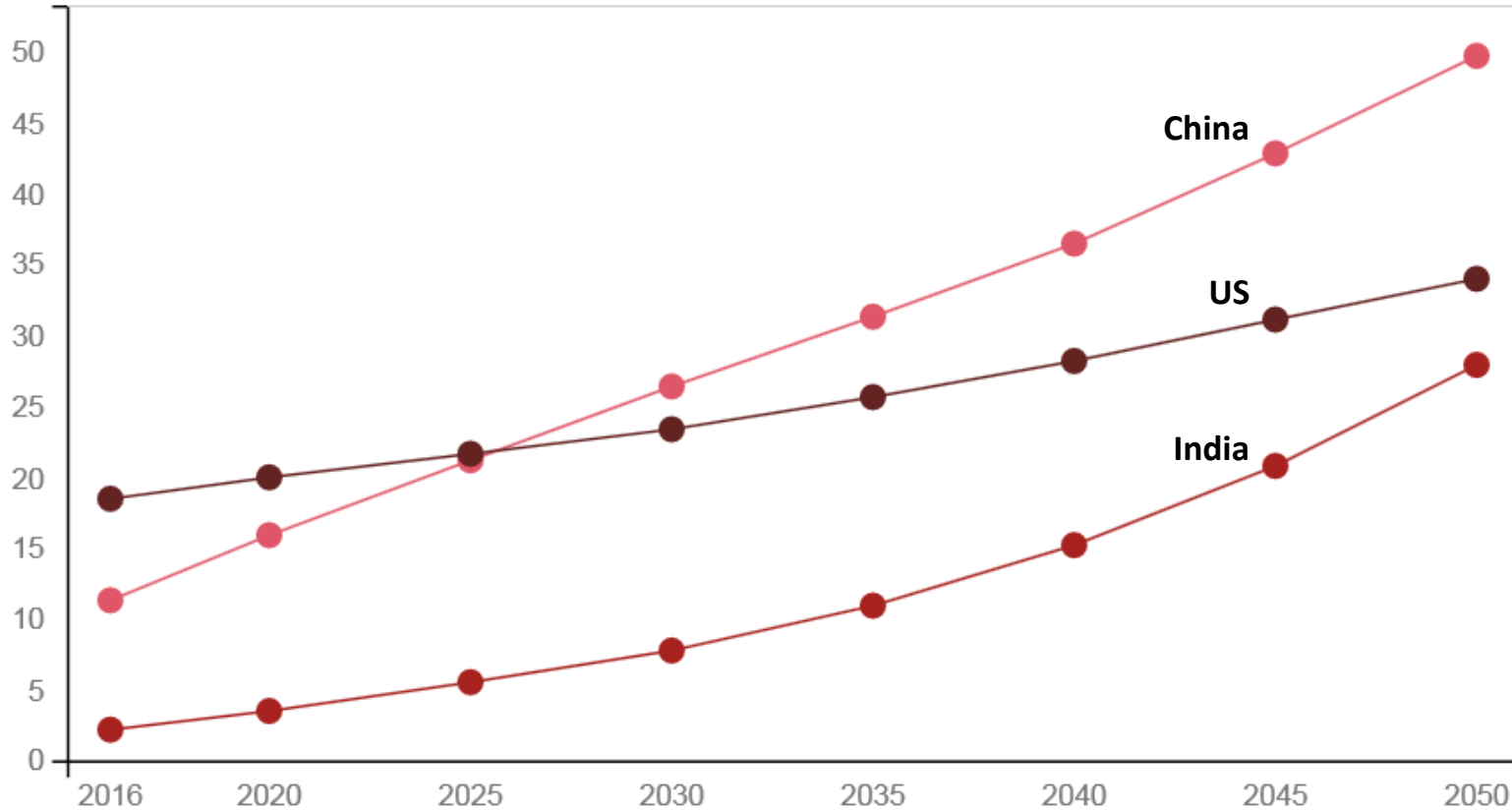
Procurement Sophistication



Source: Staffing Industry Analysts

The Rise of Asia

Forecast National GDP 2016 to 2050



Source: PwC (The World in 2050)

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Most Attractive Staffing Markets Globally 2018

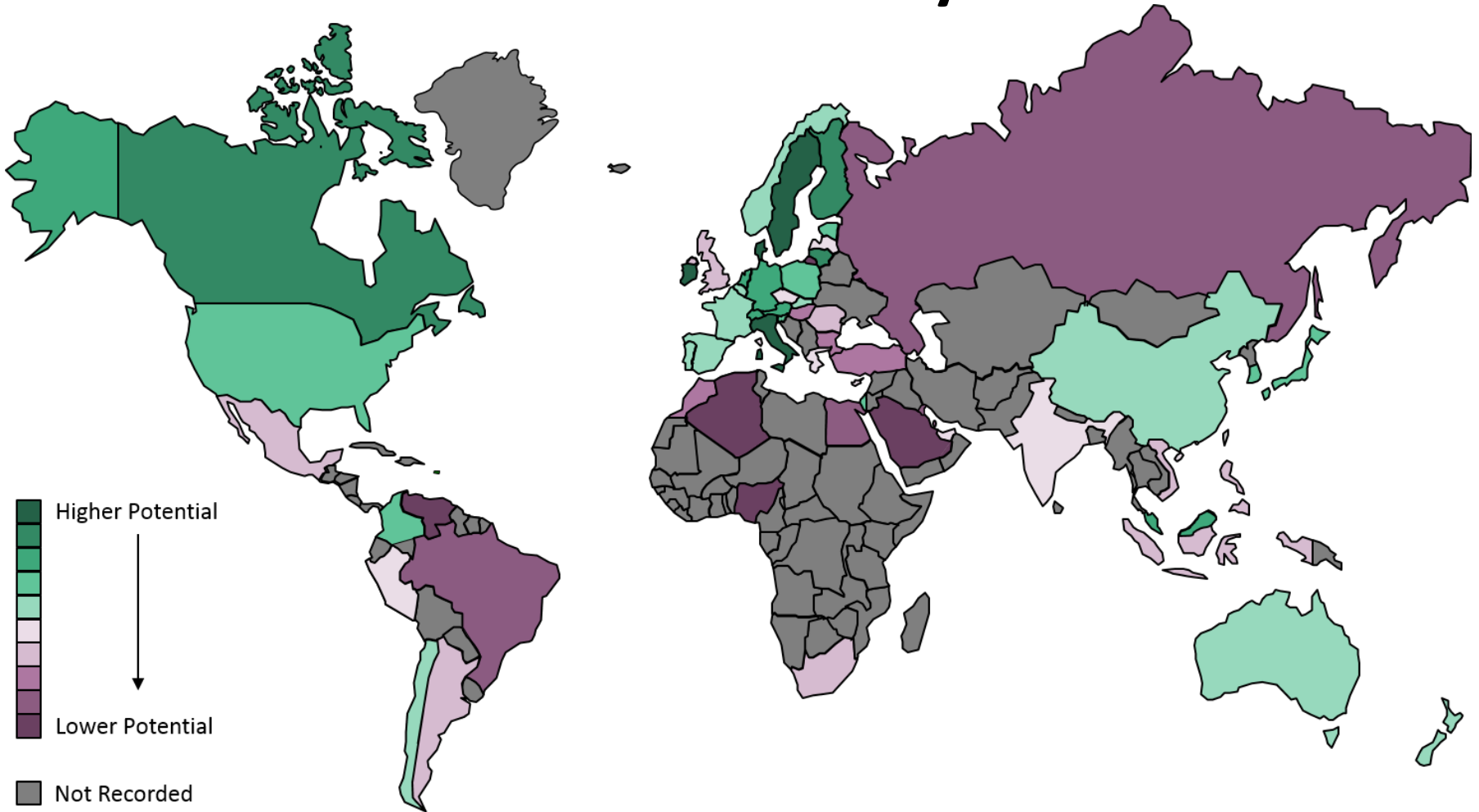
22 February, 2018 | David Papapostolou | dpapapostolou@staffingindustry.com

Methodology: 10 Attractiveness Indicators

- Staffing market size
- Protection of permanent employees
- Regulations on temporary agency work
- Ease of doing business
- GDP growth 2018-2022
- Staffing market growth
- Long term growth potential
- Market competition
- Political stability
- Human capital

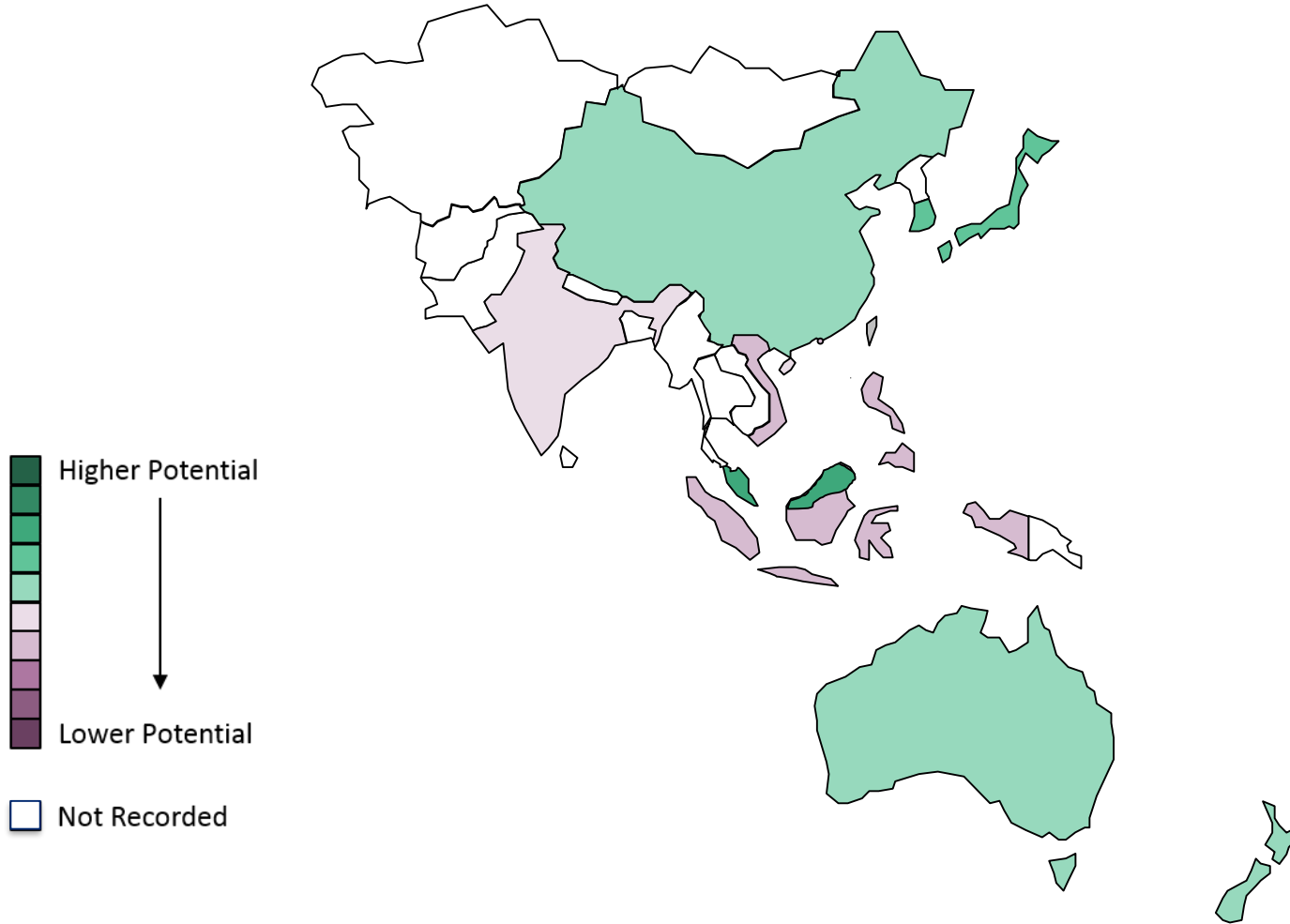
Source: Most Attractive Staffing Markets Globally 2017

Most Attractive Markets Globally



Source: Most Attractive Staffing Markets Globally 2017

Most Attractive Markets in APAC



Source: Most Attractive Staffing Markets Globally 2017

Most Attractive Staffing Markets in APAC

	Country	Market Size	Protection of Permanent employees	Regulations on Temporary Agency Work	Ease of Doing Business	Economy (GDP 2018 - 2022)	Staffing Market Growth 2018	Long Term Growth Potential	Market Competition	Political Stability	Human Capital	2018 score (2017 score)
1	Malaysia	3	2	10	9	8	8	10	3	4	8	65 (67) ↓
2	Japan	10	6	9	8	2	5	5	1	8	9	63 (65) ↓
-	South Korea	6	5	6	10	5	4	9	4	6	8	63 (65) ↓
4	China	9	9	5	5	10	10	1	4	1	7	61 (62) ↓
5	Australia	9	6	8	9	5	2	1	2	9	9	60 (64) ↓
6	New Zealand	5	1	10	10	5	5	1	3	10	10	60 (67) ↓
7	Hong Kong, China	5	4	5	10	5	4	7	1	8	9	58 (57) ↑
8	India	8	4	6	4	10	7	10	5	2	2	58 (56) ↑
9	Singapore	4	4	4	10	5	3	7	2	9	9	57 (58) ↓
-	Vietnam	2	5	6	6	10	9	10	3	1	5	57 (58) ↓
11	Philippines	2	5	6	3	10	10	10	3	1	6	56 (60) ↓
12	Indonesia	4	5	5	5	9	7	10	3	2	5	55 (56) ↓

Higher Potential  Lower Potential

Source: Most Attractive Staffing Markets Globally 2017

APAC Markets Becoming Less Attractive?

2018-2017 score changes

	Country	Market Size	Regulations on Temporary Agency Work	Ease of Doing Business	Economy (GDP 2018 - 2022)	Staffing Market Growth 2018	Long Term Growth Potential	Political Stability	Human Capital	2018-2017 Score Change
1	India	1		2				-2	1	2
2	Hong Kong, China					2		-1		1
3	China		-1		1		-1	-3	3	-1
-	Singapore					-1				-1
-	Indonesia	1		1		-2		-2	1	-1
-	Vietnam			1		1		-3		-1
7	Malaysia							-3	1	-2
-	South Korea					-1		-1		-2
-	Japan							-1	-1	-2
10	Australia		-1				-2	-1		-4
-	Philippines			-1		1		-4		-4
12	New Zealand					1	-8			-7

Higher Potential  Lower Potential

Source: Most Attractive Staffing Markets Globally 2017

Market Attractiveness Assessment Tool



Market Attractiveness Assessment Tool

Step 1 - Select the indicators

- Market Size
- Protection of Permanent Employees
- Regulations on Temporary Work
- Ease of Doing Business
- Economy (GDP 2018-2022)
- Staffing Market Growth 2018
- Long Term Growth Potential
- Market Competition
- Political Stability
- Human Capital

Step 2 - Select the Weighting Values

100%
100%
100%
100%
100%
100%
100%
100%
100%
100%
100%

Pick a weighting value from the pull down menu.
100% is the default value

Step 3 - Sort the data

Click Here

Country	Market Size	Protection of Permanent employees	Regulations on Temporary Agency Work	Ease of Doing Business	Economy (GDP 2018 - 2022)	Staffing Market Growth 2018	Long Term Growth Potential	Market Competition	Political Stability	Human Capital	Score
Italy	9	8	9	7	2	10	7	9	5	7	73
Sweden	7	7	9	10	4	7	6	3	10	10	73
Ireland	7	6	9	9	5	6	6	7	8	9	72
Denmark	5	6	8	10	4	10	8	1	9	10	71
Finland	6	5	7	9	3	9	7	3	10	10	69
Lithuania	3	6	4	9	6	10	10	6	7	8	69
Canada	8	4	10	9	3	3	8	4	9	9	67
Austria	7	7	7	9	3	6	5	4	8	9	65
Germany	10	9	6	9	3	5	3	1	9	10	65
Malaysia	3	2	10	9	8	8	10	3	4	8	65
Switzerland	8	7	9	8	3	4	5	1	10	10	65
Netherlands	9	8	9	8	4	4	2	1	10	9	64
Estonia	2	6	4	9	5	4	8	8	8	9	63
Japan	10	6	9	8	2	5	5	1	8	9	63
Poland	5	7	6	8	5	10	7	1	6	8	63
Slovenia	3	7	6	8	4	8	7	3	7	10	63
South Korea	6	5	6	10	5	4	9	4	6	8	63
United States	10	3	10	10	4	3	4	1	8	10	63

Source: Most Attractive Staffing Markets Globally 2017

Agenda

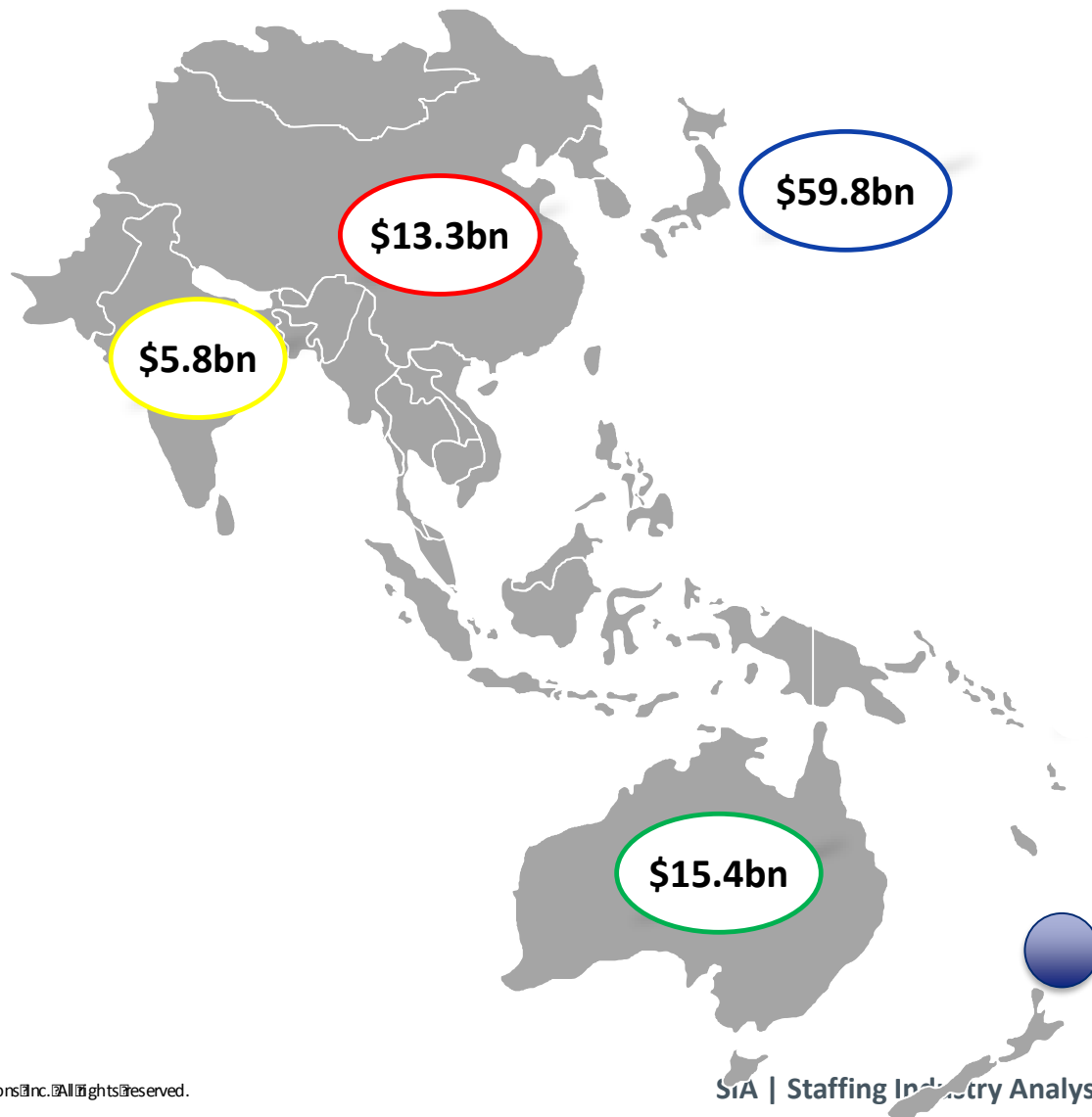
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Asia Pacific Market Size 2017



Source: Staffing Industry Analysts

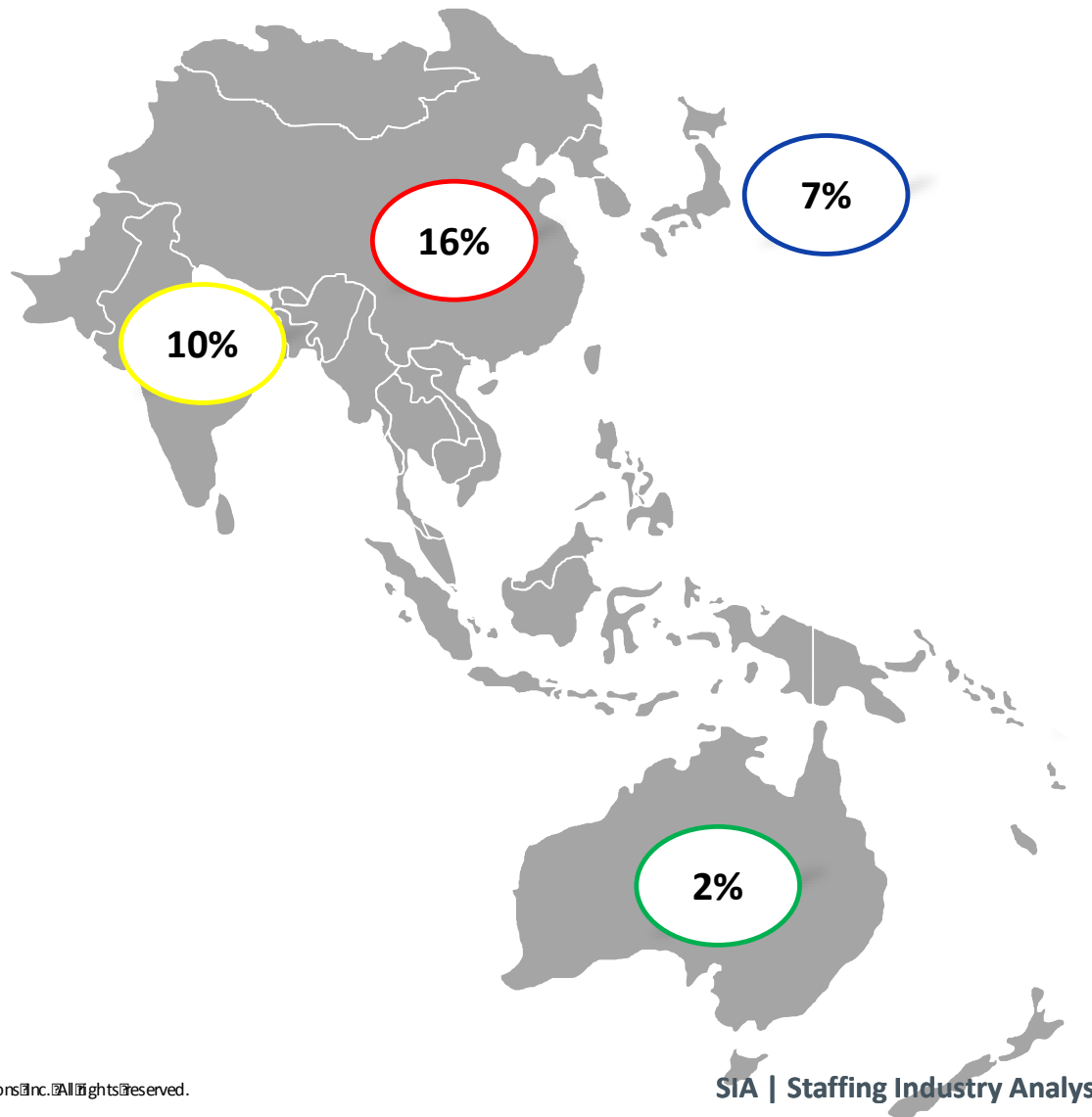
Asia Pacific Market Size 2017



Country	USD bn
South Korea	2.7
Hong Kong	1.4
New Zealand	1.3
Singapore	1.0
Indonesia	0.6
Malaysia	0.2
Philippines	0.2
Vietnam	0.1
Other Asia	2.6

Source: Staffing Industry Analysts

Asia Pacific Market Size 2017



Country	Growth
Vietnam	17%
Philippines	12%
South Korea	10%
Hong Kong	9%
Singapore	7%
New Zealand	5%
Malaysia	5%
Indonesia	4%
Other Asia	6%

Source: Staffing Industry Analysts

Asia Pacific Staffing Sectors

Size of Market by Sector (USD bn)

Total staffing market	Total Temp	Total Place & Search
102	88	14

Total Commercial	Office/ Clerical	Industrial
55	26	30

Total Professional	IT	Healthcare	F&A	Engineering	Clinical/ Scientific	Marketing/ Creative	Education/ Library	Other Professional
32	11	4	5	6	1	1	1	3

Source: Staffing Industry Analysts

Trends



■ Expansion



■ Foreign Workers



■ Informal



■ Irregular Workers



■ Robots

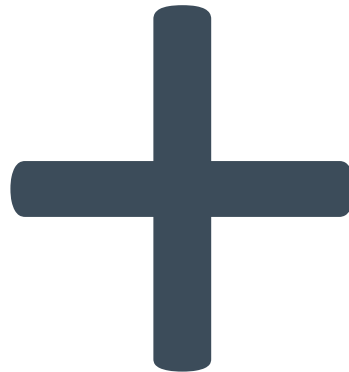


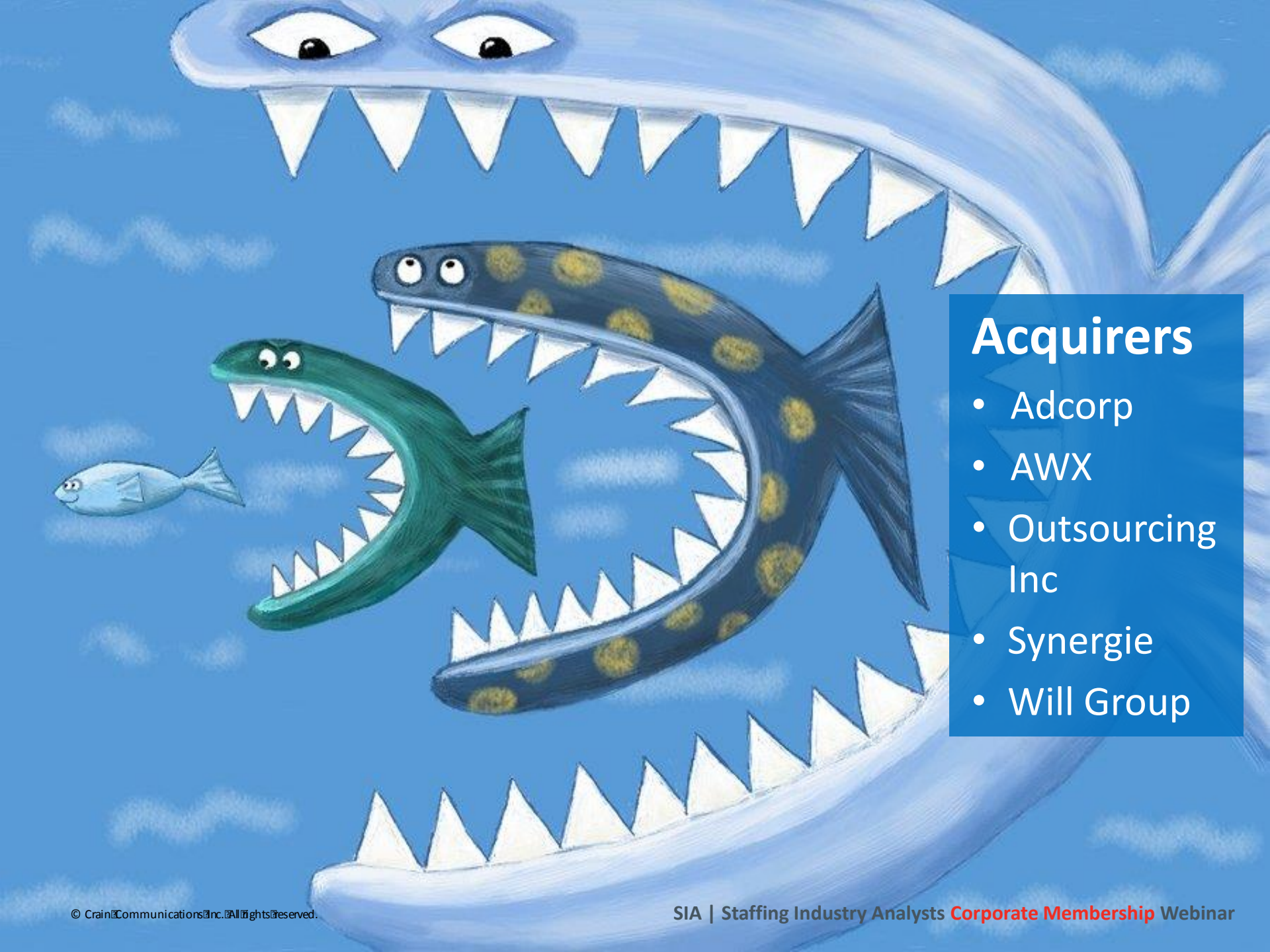
■ Growth

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Australian M&A Activity





Acquirers

- Adcorp
- AWX
- Outsourcing Inc
- Synergie
- Will Group

Performance of Australian Private Companies v Global Companies

	Local Companies	Global Companies
Average Revenue Growth	17.2%	1.5%
Average Gross Profit %	11.1%	17.9%
Average EBITDA %	2.6%	4.9%
Average Conversion GP into EBITDA	26.1%	16.0%

Source: Staffing Industry Analysts

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Legal Update

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LEGAL COMPLIANCE AND RISK



Implementing GDPR: A Guide

20 March 2018

- This Guide provides staffing firms, hirers and workforce solutions providers with an overview of the European General Data Protection Regulation (GDPR).
- It provides a checklist for organisations to achieve compliance with the GDPR.

Analyst: [Fiona Coombe, CCWP](#)

RESEARCH ANALYST

FIONA COOMBE



Fiona Coombe is Director of Legal and Regulatory Research and is responsible for quarterly regional Legal Updates on the latest legal developments of significance for staffing firms and buyers in Asia Pacific, North America, ... [more](#)

Recent Legal Research: APAC Region

- Global reports on GDPR Implementation; Co-Employment Laws; and data protection;
- Legal Update Q4 2017 (Q1 2018 published early April)
- 2018 Legal Calendar



Australia Labour Hire Licensing

- Labour hire businesses must obtain a licence
 - **South Australia:** 6 months from 1 March 2018
 - **Queensland:** 60 days from 16 April 2018
 - **Victoria:** legislation pending parliamentary approval



Source: Staffing Industry Analysts

Australia Labour Hire Licensing



- Common requirements:
 - Providers of labour hire services to hold a licence, and businesses wanting to use labour hire workers have an obligation to use only licensed providers;
 - licence providers required to pass “a fit and proper person test” and show compliance with workplace and labour hire laws and accommodation standards;
 - labour hire providers to be listed on a public register;
 - a newly established body to monitor and investigate compliance; and
 - operators that do not hold a licence or breach licensing requirements will be liable for civil and criminal penalties.

Source: Staffing Industry Analysts

Australia



- To be piloted from 1 July 2018 for highly skilled migrants
- Effective 22 February 2018, Privacy Amendment (Notifiable Data Breaches) Act 2017
 - Requires companies with turnover of more than AUD 3m a year to notify customers, and the Australian Information Commissioner within 30 days, if their personal info is involved in a data breach likely to cause "serious harm"
- Termination of worker at client's request without investigation is unfair dismissal: *Manisha Kumar v Australia Personnel Global Pty Ltd [2017] FWC 5661*

Source: Staffing Industry Analysts

Japan

- As of 1 April 2018, dispatch workers on fixed term contracts for 5 years have a to request permanent employment
- Labour Contracts Act introduced the rule in April 2013
- The employer is prohibited from turning down the application
- To calculate 5 years, employees may add length of work under previous contracts if they are rehired within six months of the end of the earlier contract



Source: Staffing Industry Analysts

Other APAC

- **China** – Beijing eases rules on foreign businesses owning recruitment firms
 - Permitted share increases from 49% to 70%
 - Removal of 3 years experience requirement
- **Singapore** – Changes to Tripartite Standards on Flexible Work and Recruitment Practices
 - Not mandatory but best practice
 - Recruitment must be fair and based on merit

Source: Staffing Industry Analysts

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VMS, MSP and RPO Market Size & Growth

Market Revenue and Growth by Region 2016

	VMS	MSP	RPO
Global	\$138bn	\$117bn	\$4bn
<i>Global Growth</i>	<i>+15%</i>	<i>+11%</i>	<i>+13%</i>
APAC	\$9bn	\$8bn	\$0.1bn
<i>APAC Growth</i>	<i>+43%</i>	<i>+26%</i>	<i>+34%</i>

Source: Staffing Industry Analysts (various reports)

APAC Workforce Today



Source: Workforce Solutions Buyer Survey APAC, 2017

APAC Workforce in Two Years Time



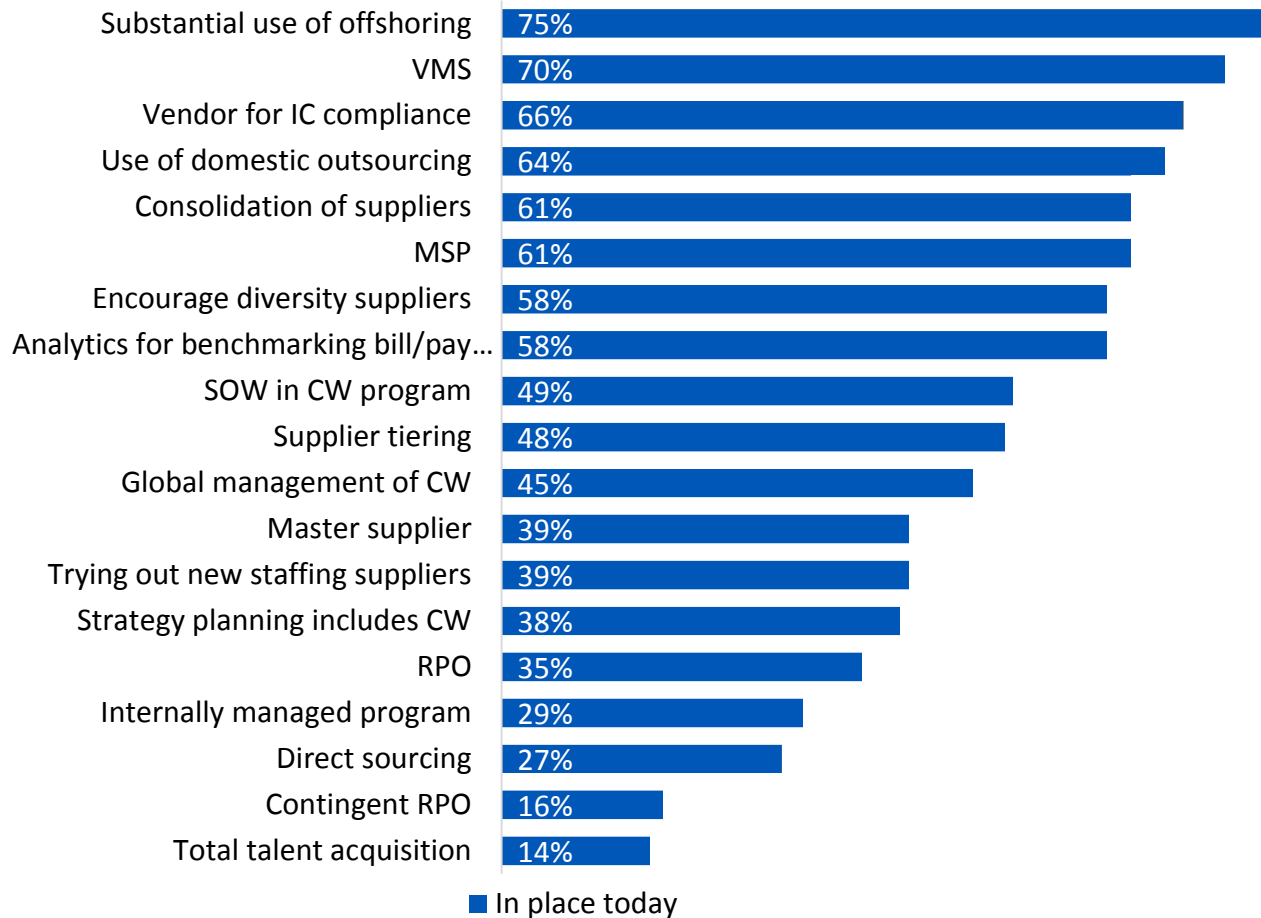
Source: Workforce Solutions Buyer Survey APAC, 2017

APAC Workforce in Ten Years Time



Source: Workforce Solutions Buyer Survey APAC, 2017

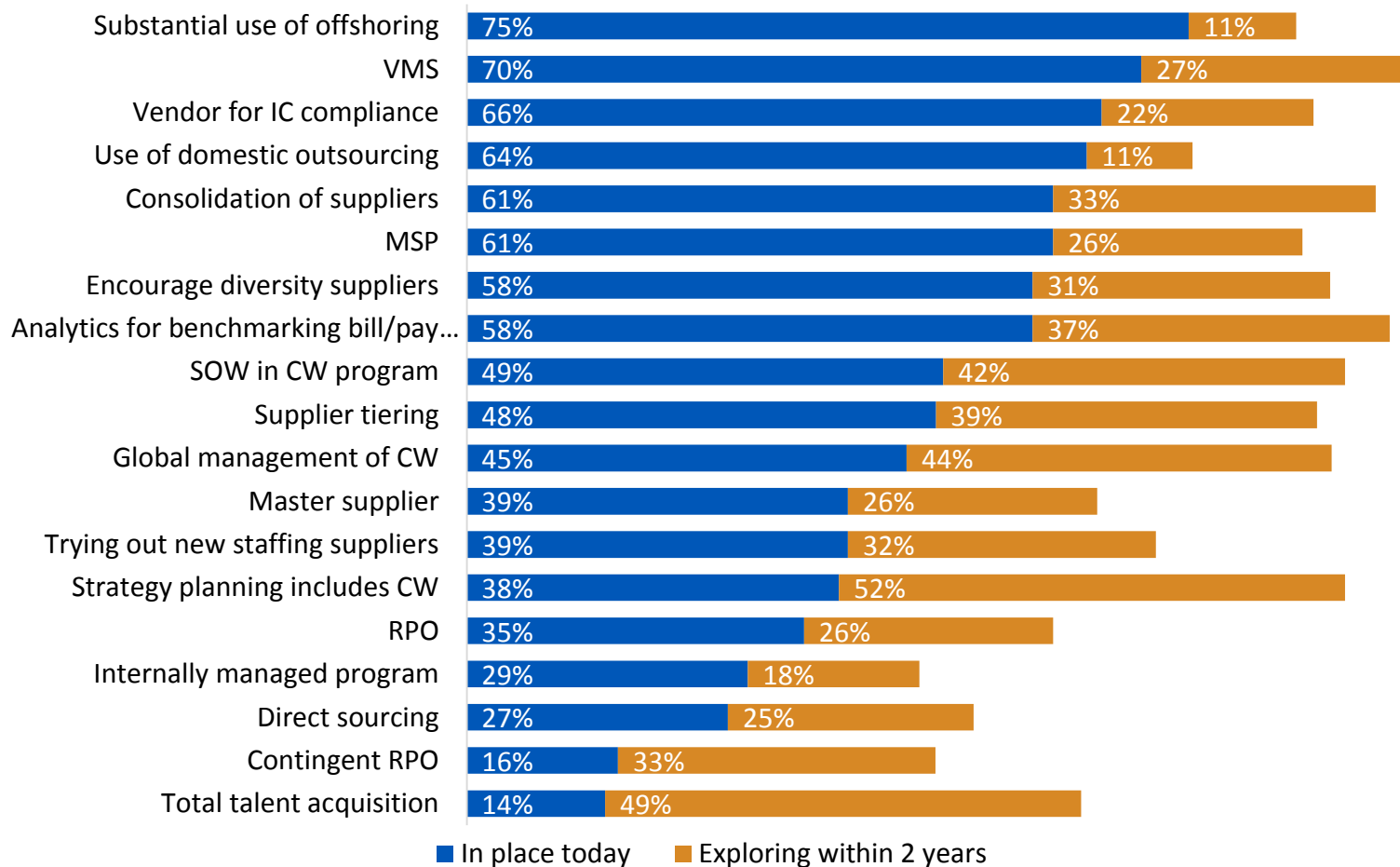
Supplier Management Strategies



N=66

Source: Workforce Solutions Buyer Survey APAC, 2017

Supplier Management Strategies



N=66

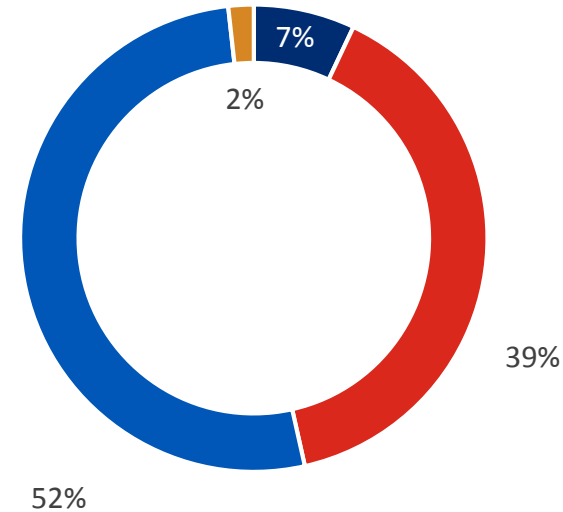
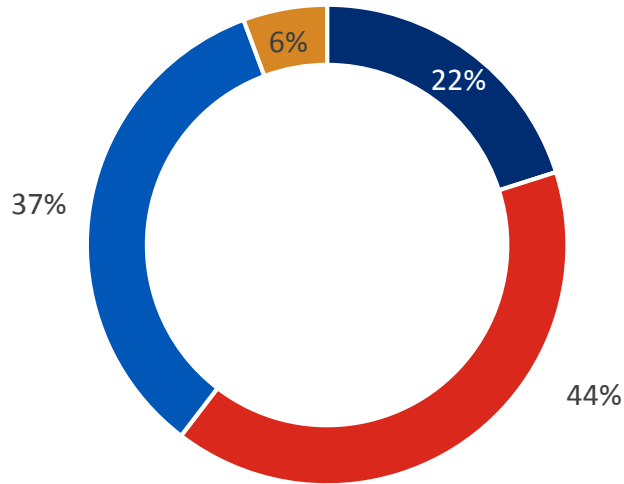
Source: Workforce Solutions Buyer Survey APAC, 2017

Total Talent Drivers

- Continuing economic uncertainty
- Supply chain cost pressures impacting the wage bill
- Demographic and generational changes to the workforce
- Constantly changing employment legislation
- Globalization
- Technology innovation
 - Big Data, artificial intelligence and blockchain
- More stringent corporate reporting requirements
 - Looking at human capital, not just financial capital – across the whole supply chain

Source: Staffing Industry Analysts

Scope of Adoption



- 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)

- Global
- Americas
- EMEA
- APAC

Source: Total Talent Acquisition Market Developments, Staffing Industry Analysts

Any Questions?



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www.collaborationgigeconomy.eu

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