



Staffing Industry Analysts APAC Webinar

This webinar is broadcast through your computer speakers via the audio broadcasting icon on your screen. You may adjust the sound volume by using the slide bar on the audio broadcasting icon. If you continue to have trouble with the sound, you may dial into the call by dialing the following numbers, India 000-800-100-8169, Singapore 800-101-2603. Australia 1800-049789 and UK +44-(0)203 478 5287 and using access code 660 716 444. Need further assistance? Contact SIA on +44 (0) 20-3823-9885.

7.00am – London
11.30am – Mumbai
2.00pm – Singapore
4.00pm – Sydney

Audio for this Webinar

- **Listen through your computer** by turning on your speakers after you log into the event. Sound will be coming through this icon:
- **Do not** close this audio broadcast box
- **To increase the volume of sound coming through your computer** speakers adjust the sound bar on the audio Broadcast box shown above
- If you continue to have trouble, please submit your need for assistance in the Q&A section



Staffing Industry Report Webinar

If you continue to have trouble with the sound, you may dial into the call by dialling India 000-800-100-8169, Singapore 800-101-2603. Australia 1800-049789 and UK +44-(0)203 478 5287 and using access code 667 804 232.

For other assistance, contact SIA at +44 (0)203 823 9885.

Within 48 hours after the webinar, the slides for this presentation, the replay and relevant links to research will be emailed to members only. Corporate members may access the research via these links; non-member attendees interested in the research should contact memberservices@staffingindustry.com for assistance with getting membership.



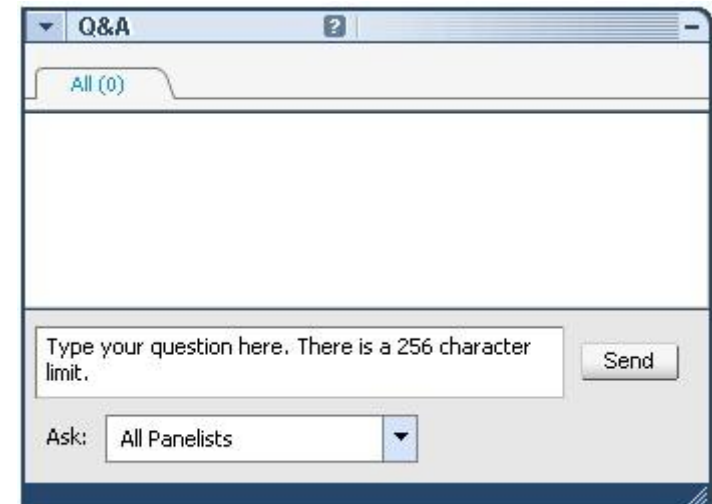
Submitting Questions

Questions may be submitted at any time during the presentation. To submit a question:

Click on the Question Mark icon (?) on the floating toolbar (as shown at the right)

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

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



SIA Presenters



Fiona Coombe
Director of
Legal &
Regulatory
Research

fcoombe@staffingindustry.com



Adam Pode
Director
Global
Research
EMEA & APAC

apode@staffingindustry.com



David Papapostolou
Senior
Research
Analyst

dpapapostolou@staffingindustry.com



Francesca Vassallo-Todaro
Research
Analyst &
Coordinator

fvassallo@staffingindustry.com

Agenda

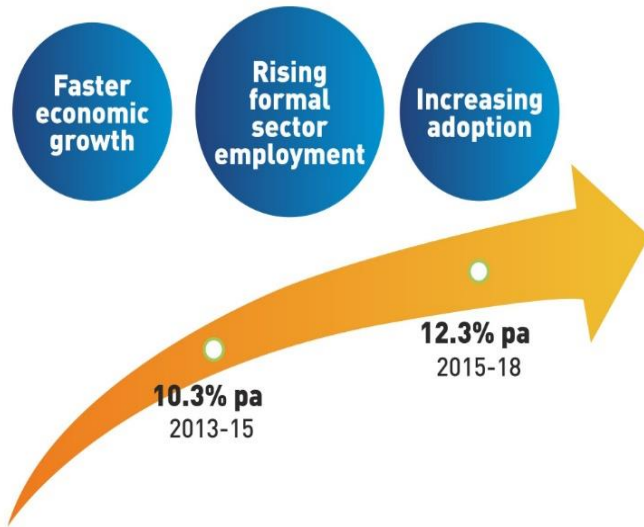
- The Indian Staffing Market
- Legal Update
- Most Complex Contingent Markets
- Directory of Suppliers to Staffing Firms



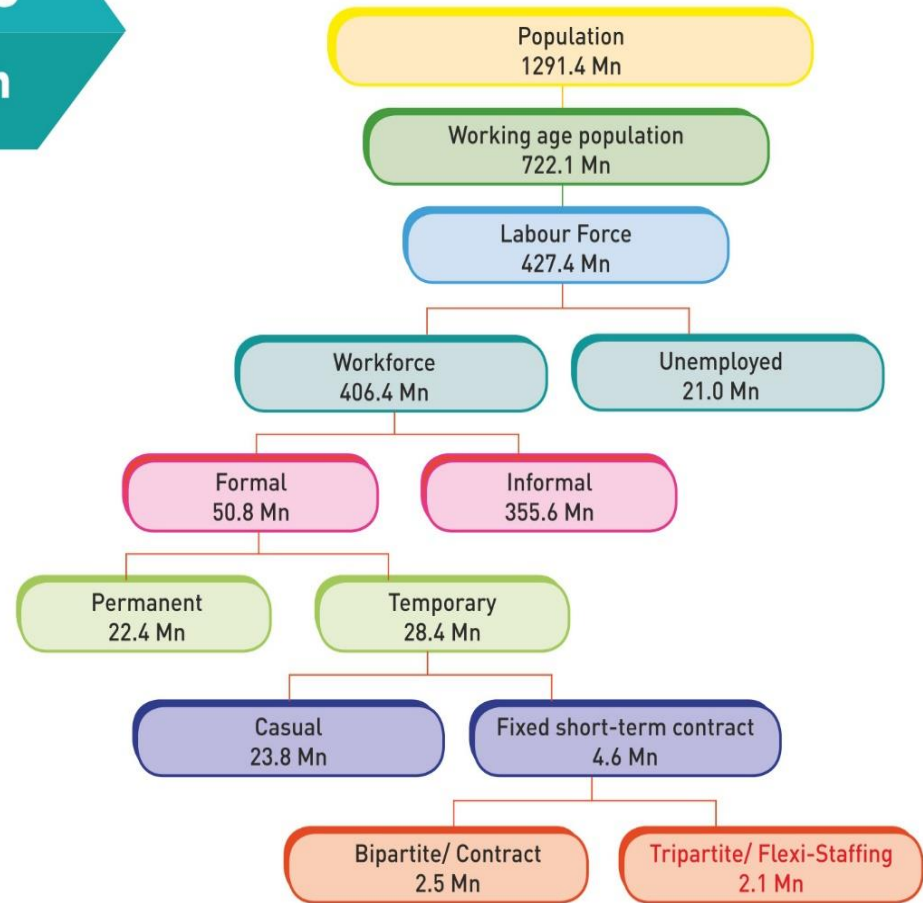
Suchita Dutta, Executive Director of the Indian Staffing Federation



Flexi staff growth rate to accelerate due to:

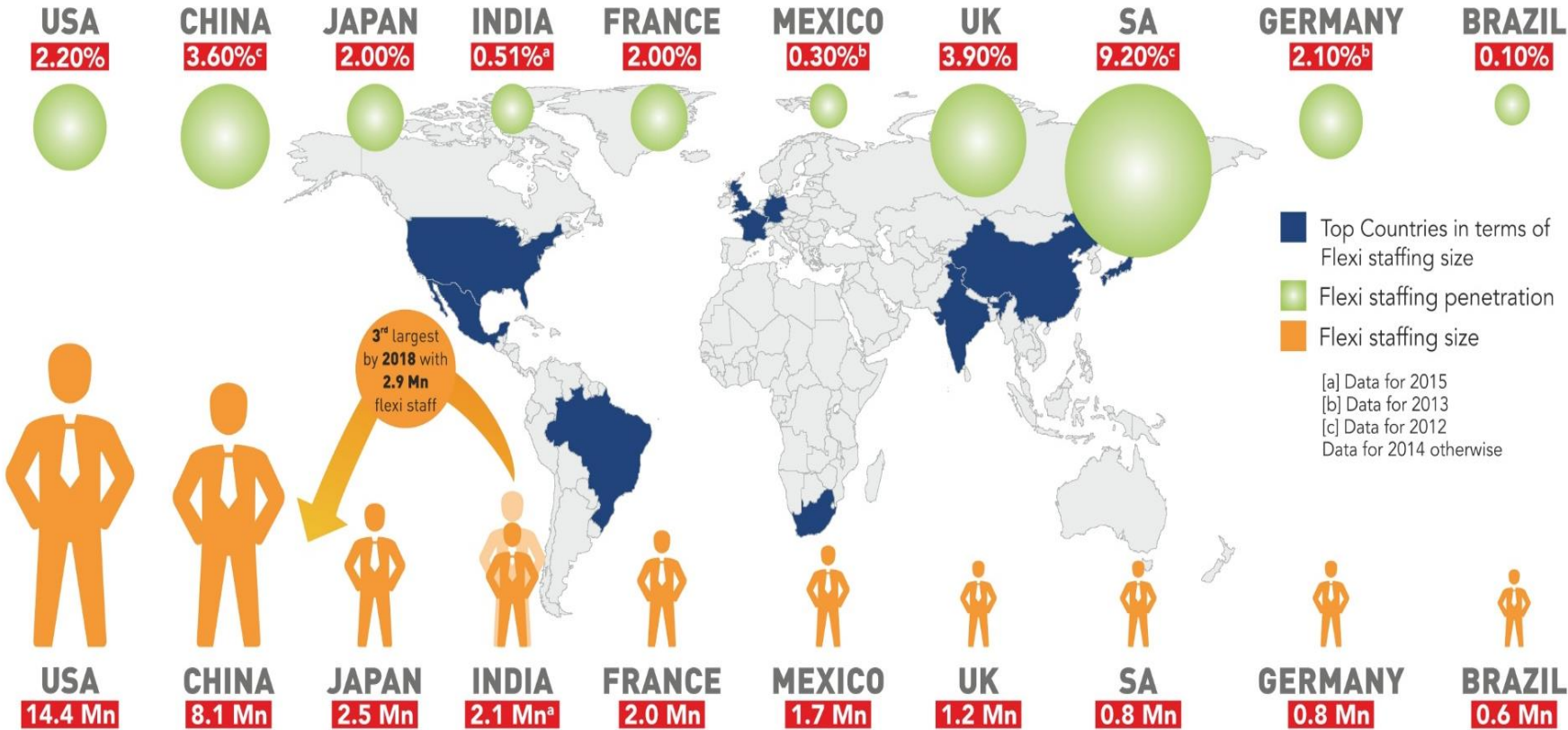


Flexi Staffing Industry in India in 2015



Source: Indian Staffing Federation

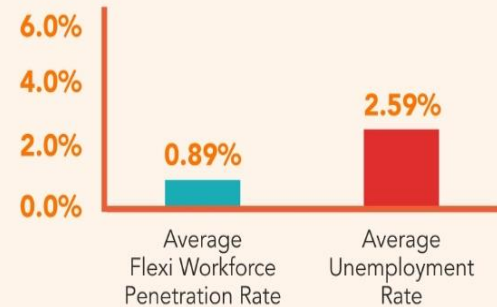
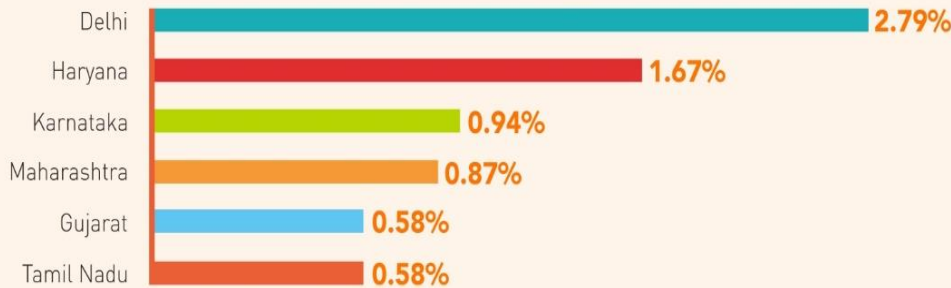
2.9 Mn flexi staff in India by 2018
 India stands at only **0.51%** flexi staffing penetration in 2015 against global average of **1.6%**



Source: Indian Staffing Federation

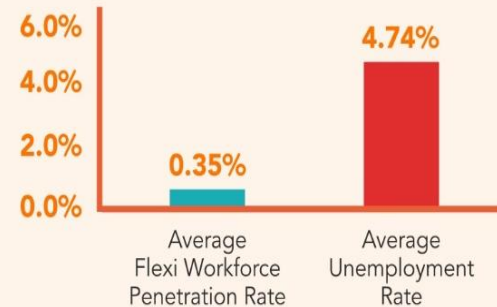
States with higher flexi staffing penetration than national average of 0.51% in 2015

Statewise flexi staffing penetration (% of workforce)



States with lower flexi staffing penetration than national average of 0.51% in 2015

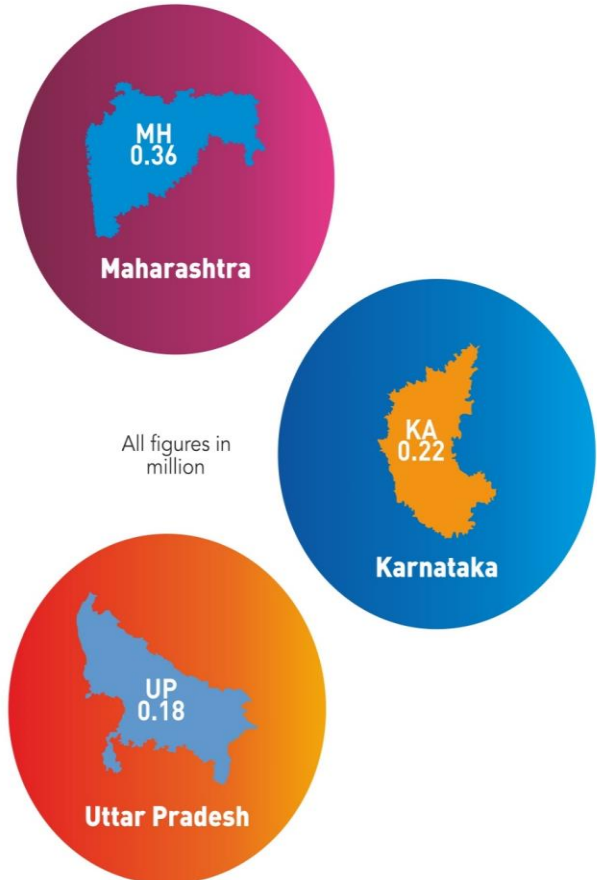
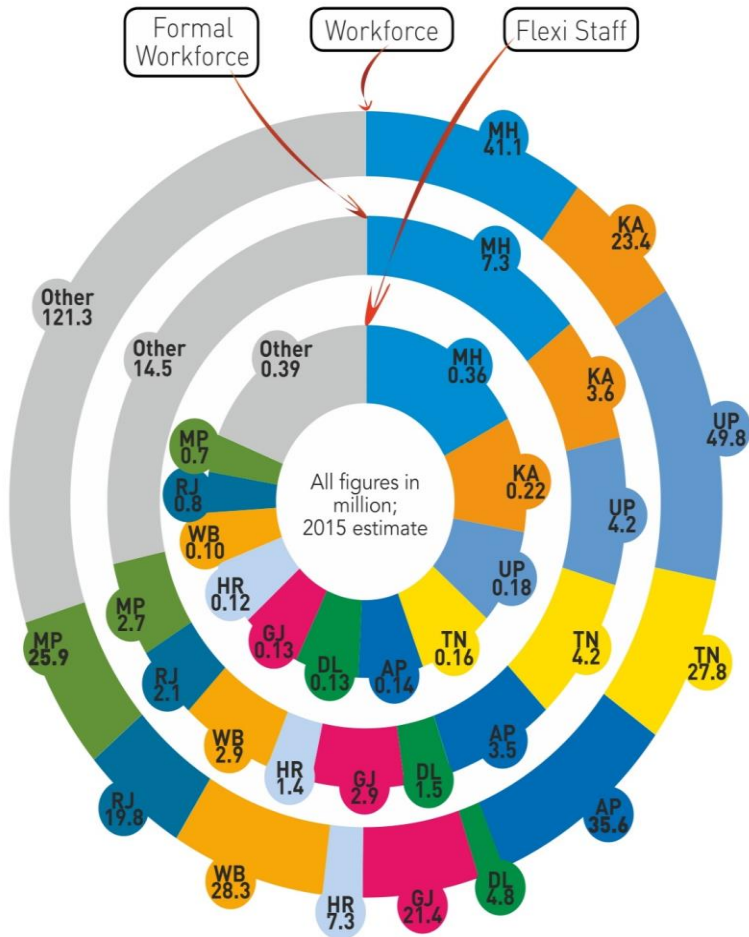
Statewise flexi staffing penetration (% of workforce)



Source: Indian Staffing Federation

The 11 states employed 1.7 Mn out of 2.1 Mn flexi staff in 2015

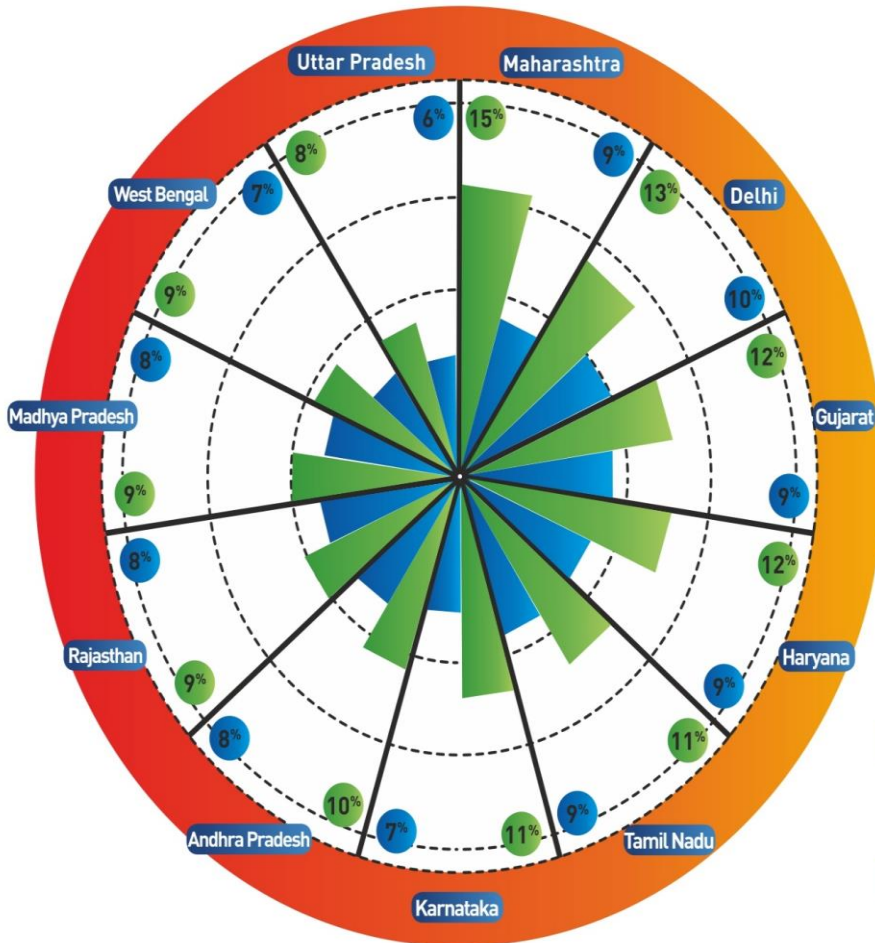
Top 3 states employed 0.76 Mn flexi staff



All figures in million

Source: Indian Staffing Federation

State wise expected growth in flexi staffing vs long term economic growth (in %)



Top 5 state economies growing at **9%+ pa**

11%+ pa flexi staffing growth in fast growing states

≤7% pa long term SGDP¹ growth in UP and WB

Flexi staffing in UP and WB grew at **≤9% pa**

■ Estimated growth in flexi staffing over 2013-15

■ Long term GDP growth over 2004-05 to 2014-15

Source: Indian Staffing Federation



Presenter
Suchita Dutta
Indian Staffing Federation

Agenda

- The Indian Staffing Market
- Legal Update
- Most Complex Contingent Markets
- Directory of Suppliers to Staffing Firms

Legal Research: APAC

- **GDPR: Implementation Guide and FAQs**
- **APAC Legal Updates Q1 & Q2, 2018**
- **Global Update on Developments in Data Protection – New**



Legal Compliance and Risk
 SUB-TOPIC SEARCH
[MISCLASSIFICATION](#)
[WAGE AND HOUR](#)

LEGAL COMPLIANCE AND RISK



Asia Pacific Legal Update Q2 2018
 16 July 2018

- In this report, we round up the legal developments affecting the workforce solutions ecosystem across the Asia Pacific region in Q2 2018:
- **Australia:** Minimum Wage Increase 1 July 2018; South Australia Postpones Labour Hire Licensing Scheme; New Long Service Leave and Portable Benefits for Victoria... [More](#)

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](#)



Legal Compliance and Risk

Implementing GDPR: A Guide

20 March 2018 | Fiona Coombe, Director of Legal and Regulatory Research | foombe@staffingindustry.com

BRIEFING

PRINT

GDPR: FREQUENTLY ASKED QUESTIONS

May 30, 2018

Email | Facebook | Twitter | LinkedIn

The General Data Protection Regulation (GDPR) is effective 25 May 2018. The information provided in this report draws on guidance from the UK's Information Commissioner's Office and other sources to provide clarification on some of the key themes of the GDPR including its' scope, definitions, lawful processing and transparency requirements. It should be read in conjunction with our report, *Implementing GDPR: A Guide*, published on our website.

SCOPE

- Q.1 Is a business email address 'personal data'?
- Q.2 Does the GDPR only apply to workers' personal data?
- Q.3 If we anonymise the data, does this take us outside the scope of GDPR?
- Q.4 If we are reporting on our contingency workforce where their names would be linked to the bill rate is this considered processing personal data?
- Q.5 If an MSP located outside of the EU is processing and viewing data about workers employed in the EU, is there an issue?



WHY THIS MATTERS

GDPR applies to the processing of personal data of any individual in the European Union, regardless of whether the processing takes place in the EU or not.

FIONA COOMBE, CCWP

Director, Legal & Regulatory Research

Bio • Contact

Recent Posts

- [Asia Pacific Legal Update Q2 2018](#)
- [GDPR: Frequently Asked Questions](#)

India Focus: Legal Update 2017-2018

■ Legal Reform

- **Maternity Benefit Act 1961**, amended March 2017 increased leave from 12 weeks to 26 weeks and required employers 50+ staff to provide creche facilities
- **Rights of Persons with Disabilities Act, 2016** effective June 15, 2017, prohibits discrimination with respect to recruitment, employment, and promotion on the basis of 27 forms of disability
- **Employees' State Insurance Act, 1948**, amended to increase the wage limit for coverage from INR 15000 to INR 21000
- **Model Shops and Establishments (Regulation of Employment and Conditions of Service) Bill, 2016** (“Shops Bill”) creates a framework for states in relation to terms of employment such as hours of work, leave, overtime and weekly holidays.

India Focus: Legal Update 2017-2018

- **Consolidation of 44 central employment laws into 4 labour codes:**
 1. **Labour Code on Industrial Relations** — Consolidating the Industrial Disputes Act, 1947, the Industrial Employment (Standing Orders) Act, 1946 and the Trade Unions Act, 1926;
 2. **Labour Code on Social Security and Welfare** — Consolidating social security laws such as the Employees Provident Funds and Miscellaneous Provisions Act, 1952, the Employees State Insurance Act, 1948, Maternity Benefit Act, 1961, the Employees Compensation Act, 1923, etc.;
 3. **Code on Wages** — Consolidating the Minimum Wages Act, 1949, the Payment of Wages Act, 1936, Payment of Bonus Act, 1965 and Equal Remuneration Act, 1976; and
 4. **Labour Code on Occupational Safety, Health & Working Conditions.**

India Focus: Legal Update 2017-2018

■ Contract Labour

- Contract Labour (Regulation and Abolition) Act, 1970 (“CLRA”)
- In Jan. 2017, **Maharashtra** increased the threshold from 20 contract employees to 50, before employers using contract labour need to register, and before providers must have a licence.
- In Sept. 2017, the Government released a **draft bill** amending the CLRA for consultation. The bill intends to exclude workers who are “regularly employed” in the establishment of the contractor from the definition of the term ‘contract labour’.
- Industrial Employment (Standing Orders) Central Rules, 1946 were amended in March 2018, to permit the **use of fixed term employees in all sectors.**

APAC Legal Update Q2 2018

- **South Australia Postpones Labour Hire Licensing Scheme**
 - Scheme commenced in March and agencies were required to apply for a licence by 31 August. In response to concerns SA government will not enforce until 1 February 2019.

- **Hong Kong amends Rules on Employment Agencies**
 - Increased penalties for non-compliance and new grounds for refusal or revocation of a licence.

- **Philippines Bill Proposes Limiting Fixed-Term Employment and Labour-Only Subcontracting**
 - An Act Strengthening the Security of Tenure of Workers, Amending for the Purpose Presidential Decree No. 442, proposes restricting the use of fixed term contracts to avoid permanent employment and licensing of contractors.

APAC Data Protection Developments

■ Australia

- introduced a **data breach reporting scheme** on 22 February 2018

■ China

- **Personal Information Security Standard Specification** came into force from 1 May 2018
- It is not a law or regulation that requires mandatory compliance but should be followed
- In many ways similar to the European General Data Protection Regulation (GDPR)

■ India

- **White Paper** on comprehensive privacy laws

■ Japan - EU Adequacy Agreement

- Yet to be formally adopted, allows free flows of data without further safeguards

Agenda

- The Indian Staffing Market
- Legal Update
- **Most Complex Contingent Markets**
- Directory of Suppliers to Staffing Firms



Most Attractive Staffing Markets Globally 2018

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



Market Information and Forecasts

Most Complex Contingent Markets Globally

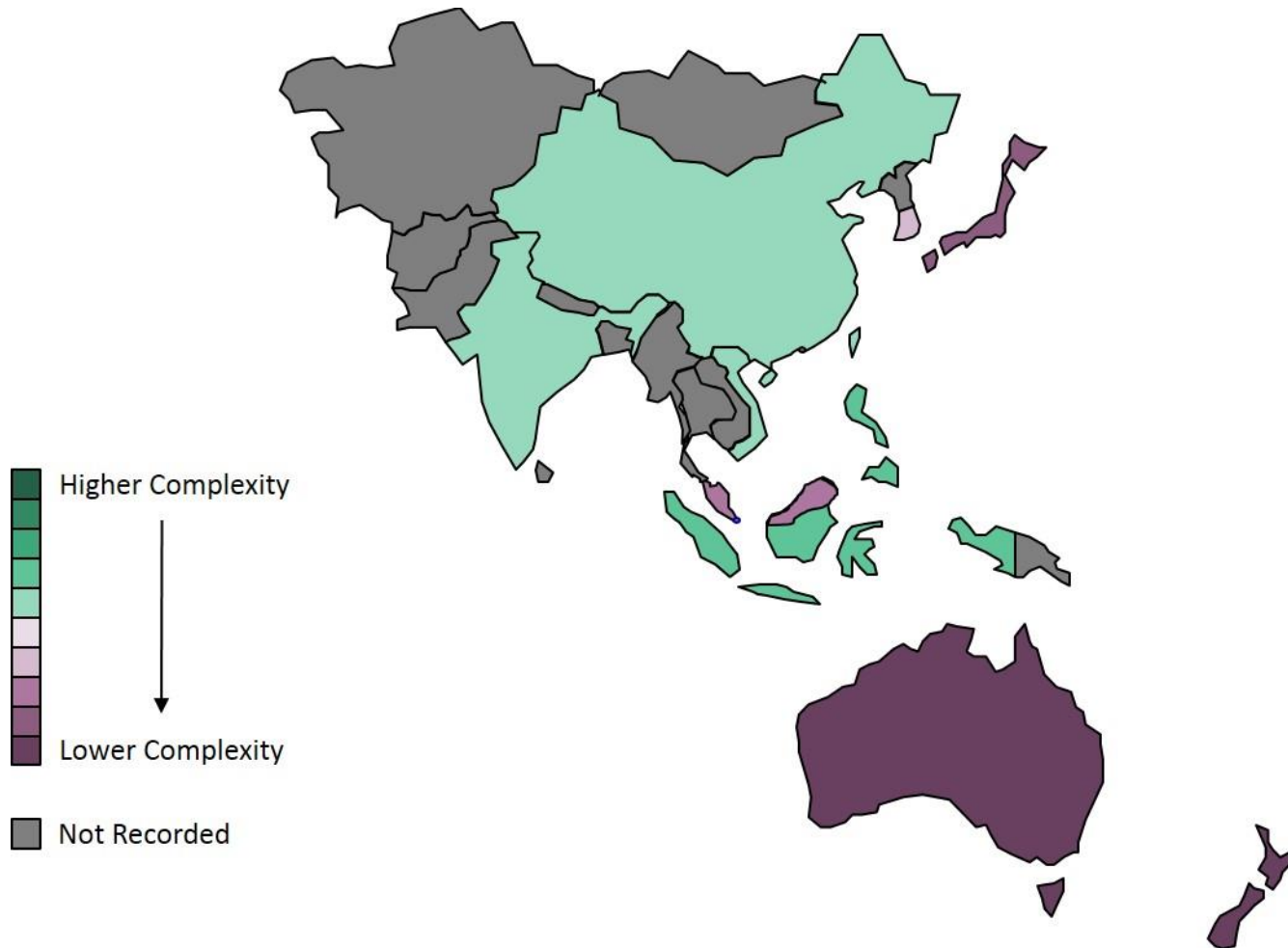
June 1st, 2018 | David Papapostolou, Senior Research Analyst | dpapapostolou@staffingindustry.com



Methodology: 11 Complexity Indicators

- Staffing market maturity
- Regulations on temporary agency work
- Independent contractor usage
- MSP/VMS maturity
- Labour market efficiency
- Employment regulation rigidity
- Trade union influence
- Enforcing contracts
- Pricing environment
- Political stability
- Human capital

Most Complex Contingent Markets in APAC



Most Complex Contingent Markets in APAC

	Country	Staffing market maturity	Temporary Agency Work Regulations	Independ't Contractor Usage	MSP/VMS Maturity	Labour Market Efficiency	Employment Regulation Rigidity	Trade Union Influence	Enforcing Contracts	Pricing Environm't	Political Stability	Human Capital	2018 score (2017 score)
1	Indonesia	10	6	3	7	7	9	3	9	5	9	6	74 (76)
2	Philippines	10	5	5	6	7	5	2	9	7	10	4	70 (65)
3	India	10	5	1	1	7	6	3	10	7	9	9	68 (71)
-	Vietnam	10	5	2	7	6	8	3	5	6	10	6	68 (63)
5	China	7	6	5	5	5	7	6	2	10	10	3	66 (61)
6	South Korea	9	5	6	6	6	9	5	1	4	5	3	59 (60)
7	Malaysia	10	1	6	6	4	3	2	4	5	7	3	51 (54)
8	Japan	5	2	9	5	4	3	5	4	2	3	2	44 (42)
9	Hong Kong, China	8	3	9	5	1	1	5	3	2	3	1	41 (38)
10	Australia	1	3	8	1	5	4	9	2	1	2	2	38 (37)
-	Singapore	8	3	8	4	1	4	4	1	2	2	1	38 (40)
12	New Zealand	2	1	8	4	2	2	5	2	3	1	1	31 (29)

Higher Complexity  Lower Complexity

India: Getting Less Complex?

	Country	2018-2017 Score Change
1	India	-3
-	Malaysia	-3
3	Indonesia	-2
-	Singapore	-2
5	South Korea	-1
6	Australia	1
7	Japan	2
-	New Zealand	2
9	Hong Kong, China	3
10	China	5
-	Philippines	5
-	Vietnam	5

MSP/VMS maturity in APAC

	Country	2018 Score
1	Australia	1
-	India	1
3	Singapore	4
-	New Zealand	4
5	China	5
-	Japan	5
-	Hong Kong, China	5
8	Malaysia	6
-	Philippines	6
-	South Korea	6
11	Indonesia	7
-	Vietnam	7

Market Complexity Assessment Tool



Market Complexity Assessment Tool



Step 1 - Select the indicators

- Staffing Market Maturity
- Temporary Agency Work Regulations
- Independent Contractor Usage
- MSP/VMS Maturity
- Labour Market Efficiency
- Employment Regulations Rigidity
- Trade Union Influence
- Enforcing Contracts
- Pricing Environment
- 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	Staffing market maturity	Temporary Agency Work Regulations	Independent Contractor Usage	MSP/VMS Maturity	Labour Market Efficiency	Employment Regulation Rigidity	Trade Union Influence	Enforcing Contracts	Pricing Environment	Political Stability	Human Capital	Score
Egypt	10	6	6	10	10	8	3	10	5	10	8	86
Venezuela	9	10	5	10	10	10	2	9	3	10	8	86
Algeria	9	7	6	6	10	8	9	7	8	8	5	83
Argentina	10	6	6	10	10	8	2	7	3	10	10	82
Morocco	8	9	5	6	8	10	8	4	8	9	7	82
Brazil	10	10	5	7	9	9	2	3	7	10	7	79
Greece	10	6	2	10	9	9	4	4	5	9	10	78
Indonesia	10	8	10	8	9	5	1	5	4	9	8	77
Kuwait	10	6	3	7	7	9	3	9	5	9	6	74
Colombia	10	6	5	7	8	8	5	8	5	7	4	73
Turkey	10	8	10	10	4	6	1	8	3	6	5	71
Italy	10	8	9	8	7	4	1	6	2	9	7	71
Nigeria	9	5	3	7	7	7	2	10	5	9	6	70
Saudi Arabia	7	2	7	5	8	5	10	7	10	6	3	70
India	10	5	5	6	7	5	2	9	7	10	4	70
Qatar	10	5	1	1	7	6	3	10	7	9	9	68
Russia	10	7	8	10	6	4	6	2	9	4	2	68

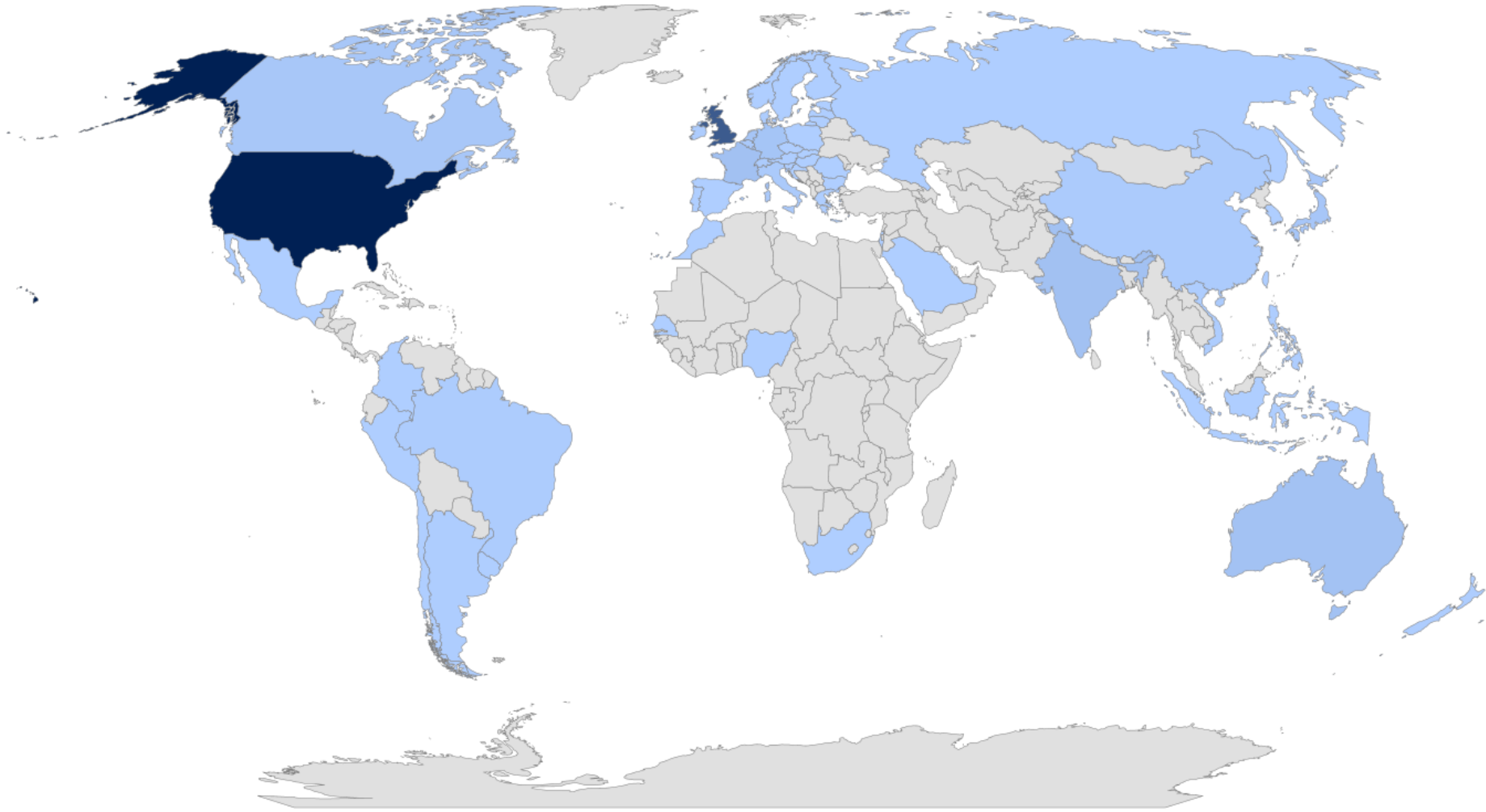
Introduction to the Tool **MACAT**

Agenda

- The Indian Staffing Market
- Legal Update
- Most Complex Contingent Markets
- **Directory of Suppliers to Staffing Firms**

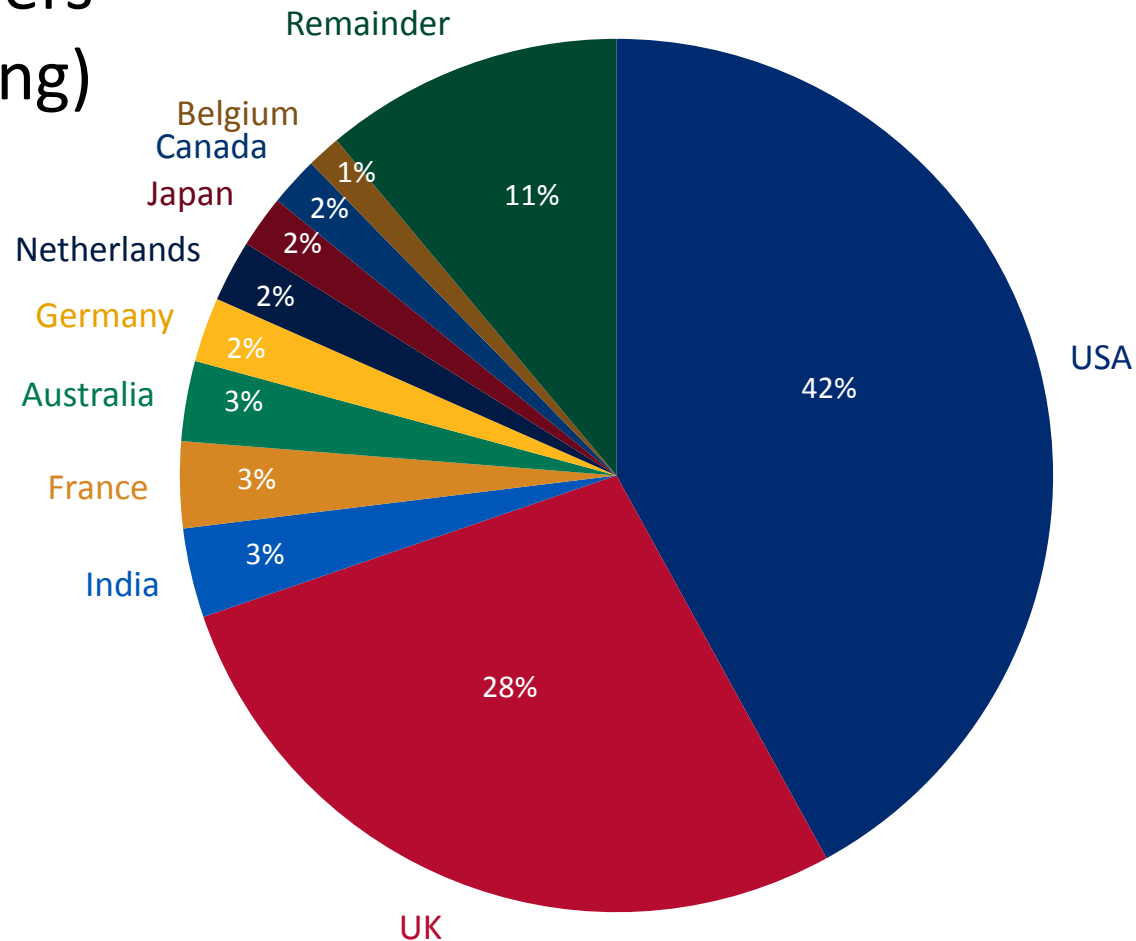
Directory of Suppliers to Staffing Firms 2018

Global Coverage



Staffing Suppliers by Country

- 876 Suppliers (and growing)



Supplier Categories

Advisors & Consultants
Analytics & Benchmarking
Benefits & Insurance
Candidate Assessment
Candidate Engagement
Candidate Verification
Compliance, Payroll & Umbrella
Employee Referrals
Financial Services
Front & Back Office Software
Investment & M&A Brokers
Legal Advisors

Marketing & Online Consulting
Media
Offshore Recruitment Services
Online Job Advertising
Payroll Funding & Back Office Services/Factoring
PR
Recruitment to Recruitment
Split Fee Networks
Sourcing Automation
Staffing Associations
Training & Recruiter Assessment

Represented Companies with HQ in India

Company Name/Brand	Location	Website	Category
AccureQ Staffing Solutions	Ahmedabad	www.accureq.com	Offshore Recruitment Services
ANS Affiliate Solutions	New Delhi	www.ansaffiliates.com	Offshore Recruitment Services
Authbridge	Haryana	www.authbridge.com	Candidate Verification
cFirst	Bengaluru	www.cfirstcorp.com	Candidate Verification
David RPO Services	Pune	www.davidrpo.com	Offshore Recruitment Services
eCybergurus	Mumbai	www.ecybergurus.com	Offshore Recruitment Services
ePoise	Bangalore	www.epoise.com	Candidate Assessment
Finvista	Hyderabad	www.finvista.com	Investment & M&A Brokers
Galaxy RPO Solutions	Pune	http://galaxyrposolutions.in	Offshore Recruitment Services
IMS People	Ahmedabad	www.imspeople.com	Offshore Recruitment Services
Indian Staffing Federation	New Delhi	www.indianstaffingfederation.org	Staffing Associations
Info Edge	New Delhi	www.infoedge.in	Online Job Advertising
Kareermatrix	Pradesh	www.kareermatrix.com	Candidate Assessment
Key Resourcing	Pune	www.keyresourcing.com	Offshore Recruitment Services
Mint RPO	Mumbai	http://mintrpo.com	Offshore Recruitment Services
PeopleBookHR	Dhaka	www.peoplebookhr.com	Compliance, Payroll & Umbrella
Quikr	Maharashtra	www.quikr.com	Online Job Advertising
Resource HuntGroup	Hyderabad	www.resourcehuntgroup.com	Offshore Recruitment Services
RippleHire	Mumbai	www.ripplehire.com	Employee Referrals
RPO Services	Andhra Pradesh	http://rposervices.com	Offshore Recruitment Services
SageBeans RPO	New Delhi	www.sagebeans.com	Offshore Recruitment Services
SmartERP	Karnataka	www.smarterp.com	Compliance, Payroll & Umbrella
Talview	Bangalore	www.talview.com	Candidate Assessment
Talview	Bangalore	www.talview.com	Sourcing Automation
Tata Consultancy Services	Mumbai	www.tcs.com	Advisors & Consultants
Technomine	Ahmedabad	www.technomine.biz	Offshore Recruitment Services
Total Sourcer	Pune	www.totalsourcer.com	Offshore Recruitment Services
vRecruit	N/A	www.vrecruit.co.in	Candidate Assessment
XpertReview	Bengalore	www.xpertreview.com	Candidate Assessment
ZoHo	Chennai	www.zoho.eu	Front & Back Office Software

Candidate Assessment Firms

Candidate Assessment	<p>Organisations that validate if the candidate is properly qualified for a position. This range of talent acquisition technology includes screening tools such as psychometric assessments, skills assessments and interviewing platforms.</p>
--------------------------------------	---

A	B	C	D	E	F
Company Name/Brand	Location	Country HQ	Website		Back to Index
Breezy HR	Jacksonville, FL	USA	www.breezy.hr		
Compact Interview	London	UK	www.compactinterview.com		
Digi-Me	Farnham	UK	www.digi.me		
EASYRECRUE	London	UK	www.easyrecrue.com		
eCrute	Toronto	Canada	www.ecrute.com		
ePoise	Bangalore	India	www.epoise.com		
eTeki	Tampa, FL	USA	www.eteki.com		
FaceCruit	Adelaide	Australia	www.facecruit.com		
Fibonacci	Spaubeek	Netherlands	www.fibonacci.com		
GreenJob Live	Costa Mesa, CA	USA	www.greenjobinterview.com		
Hacker Rank	Palo Alto, CA	USA	www.hackerrank.com		
Harquen	Brookfield, WI	USA	www.harquen.com		
HereFish	St. Louis, MI	USA	www.herefish.com		
Hinterview	London	UK	www.hello.hinterview.com		
Hireabl	London	UK	www.hireabl.com		
Hireright	Irvine, TX	USA	www.hireright.com		
HireVue Video Interviewing	N/A	USA	www.hirevue.com/Interview		
Insight World Wide	Salem, MA	USA	www.insightww.com		

Candidate Engagement Firms

Candidate Engagement	Organisations that interact with candidates in some fashion, by phone, text message, video call, email or in person. These technology providers attempt to automate this process and personalise interactions between employer and candidate. The organisations represented in this report include providers from the following sub-categories: survey technology, texting/email technology, recruitment chatbots and engagement platforms.
--------------------------------------	---

Company Name/Brand	Location	HQ Country	Website		Back to Index
Call-Em-All	Frisco, TX	USA	www.call-em-all.com		
Appical	Amsterdam	Netherlands	www.appical.net		
Fusion Recruiting Labs	Red Bank, NJ	USA	www.fusionrl.com		
Ideal	Toronto	Canada	www.ideal.com		
Intuo	Ghent	Belgium	www.intuo.io		
JobPal	Berlin	Germany	www.jobpal.ai		
NextCrew	Glenview, IL	USA	www.nextcrew.com		
Recruitment Bot	Aberdeen	UK	www.recruitmentbot.co.uk		
RoboRecruiter	San Francisco, CA	USA	www.robo recruiter.ai		
Sense	San Francisco, CA	USA	www.sensehq.co		
StaffDNA	Plano, TX	USA	www.staffdna.com		
Start Monday	Vancouver	Canada	www.startmonday.com		
TextRecruit	N/A	USA	www.textrecruit.com		
TextUs	Boulder, CO	USA	www.textus.com		
WorkN	Atlanta, GA	USA	www.workn.com		
Zipwhip	Seattle, WA	USA	www.zipwhip.com		

Sourcing Automation Firms

Sourcing Automation	<p>Technology providers specialising in the automated process of finding and recruiting candidates. This category includes, resume parsing/search match tools, people aggregators, sourcing process automation platforms (SPAP) and Intelligent sourcing management systems (ISMS).</p>
-------------------------------------	---

A	B	C	D	E	F	G
Company Name/Brand	Location	HQ Country	Website		Back to Index	
Actonomy	Zwijnaarde	Belgium	www.actonomy.be			
Affinix	Chicago, IL	USA	www.peoplescout.com/affinix/			
Arya - AI Recruiting Technology	Raleigh, NC	USA	www.leoforce.com			
Aximo Software	Manchester	UK	www.axiomsoftware.com			
Brilent	San Mateo, CA	USA	www.brilent.com			
Burning Glass	Boston, IL	USA	www.burning-glass.com			
ClickIQ	Godalming	UK	www.clickiq.co.uk			
CV-Lizer	Vienna	Austria	www.joinvision.com/en/products/cvlizer/			
Daxtra	Richmond, VA	USA	www.daxtra.com			
Endorsed	London	UK	www.endorsed.com			
Entelo	San Francisco, CA	USA	www.entelo.com			
Hireability	Londonderry, NH	USA	www.hireability.com			
Hiring Solved	Chandler, AZ	USA	www.hiringsolved.com			
Ideal	Toronto	Canada	www.ideal.com			
Job Robotix	Louisville, KY	USA	www.jobrobotix.com			
North Star	Bristol	UK	www.northstar.ai			
Profinder	London	UK	www.profinda.com			
Pymetrics	New York, NY	USA	www.pymetrics.com			

Want to be Included?



Francesca

fvassallo@staffingindustry.com

+44 (0)7769 177278

Any Questions?



Fiona Coombe
Director of
Legal &
Regulatory
Research

fcoombe@staffingindustry.com



Adam Pode
Director
Global
Research
EMEA & APAC

apode@staffingindustry.com



David Papapostolou
Senior
Research
Analyst

dpapapostolou@staffingindustry.com



Francesca Vassallo-Todaro
Research
Analyst &
Coordinator

fvassallo@staffingindustry.com

27-28 November 2018

Grange St. Paul's Hotel | London

www.siexecutiveforum.eu

 @ExecForum #ExecForum



Register today!

The exclusive event for staffing executives from across industry sectors and sizes. Join us for keynotes and breakout sessions on a wide range of topics. This conference also offers excellent opportunities to network with peers and sponsors.

Register now at www.siexecutiveforum.eu



WEBINARS

**CORPORATE
MEMBERSHIP**

Staffing Industry Analysts' (SIA) expert research team presents the latest industry insights, trends, technology and best practices relevant to staffing and workforce solutions.

11 September – North America
24 October – EMEA

Sign up at www.staffingindustry.com/webinars-staffing