

Leading in a changing world of work

Structure & profile of the World
Employment Confederation-Europe



**WORLD
EMPLOYMENT
CONFEDERATION**

EUROPE

Corporate Presentation

2019

www.weceurope.org

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Content

1. Membership policy
2. Mission and guiding principles
3. The voice of the Employment industry
4. Key activities
5. Advocating priorities
6. Services to members
7. Governance
8. Head Office

Key facts and figures



The only European authoritative voice for the employment industry since 1967 with members from 30 European countries



Regrouping 55,000 employment agencies with 270,000 internal staff, including 7 of the largest workforce solutions businesses as direct corporate members



Represents the full spectrum of HR services, including agency work, direct recruitment, career management, RPO & MSP



Working closely with European stakeholders, including EU institutions, European social partners, Eurofound, NGOs, academic world etc.



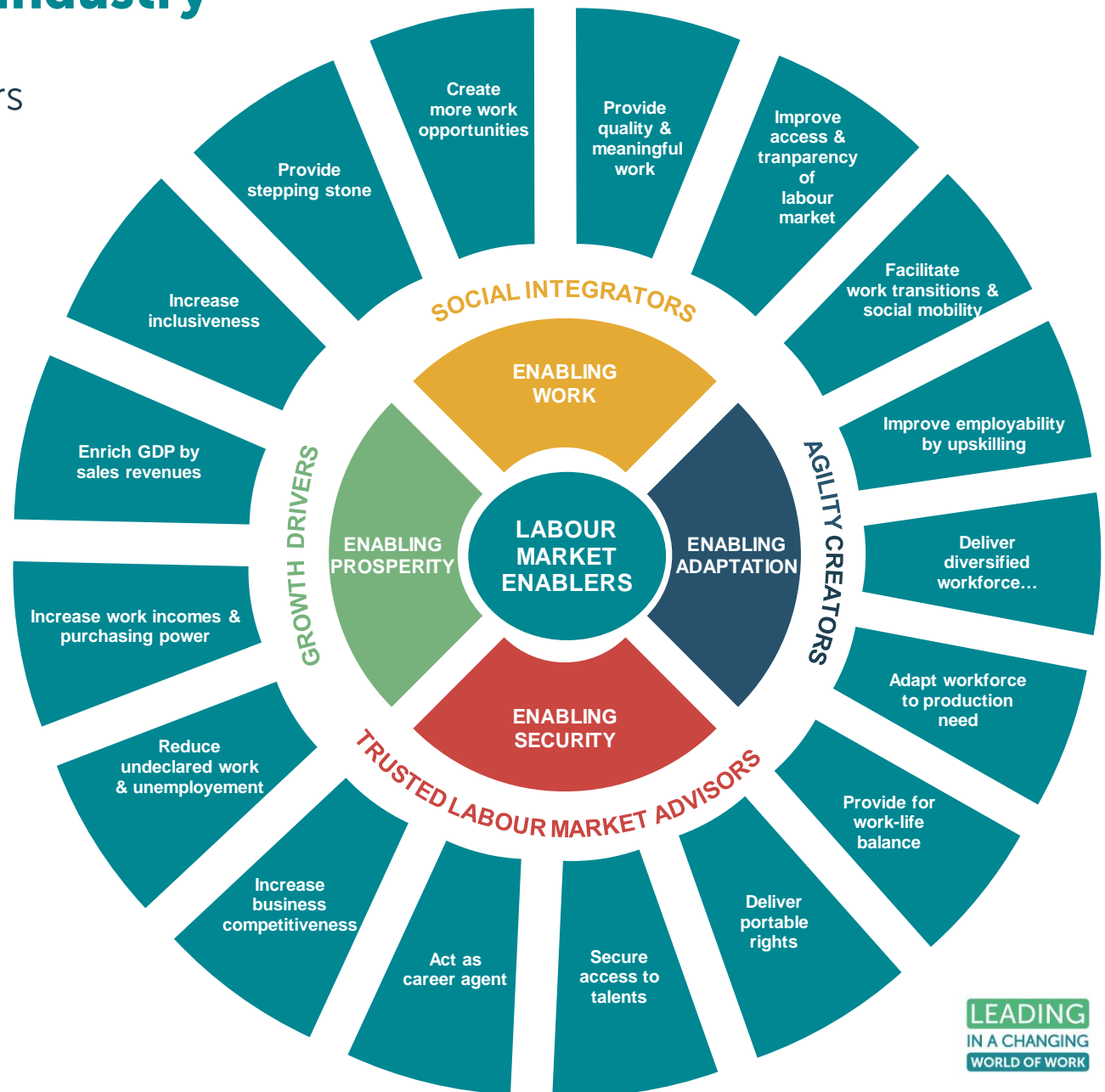
Offering access to the labour market for 11 million workers, 8,4 million of which through agency work

Positioning the industry

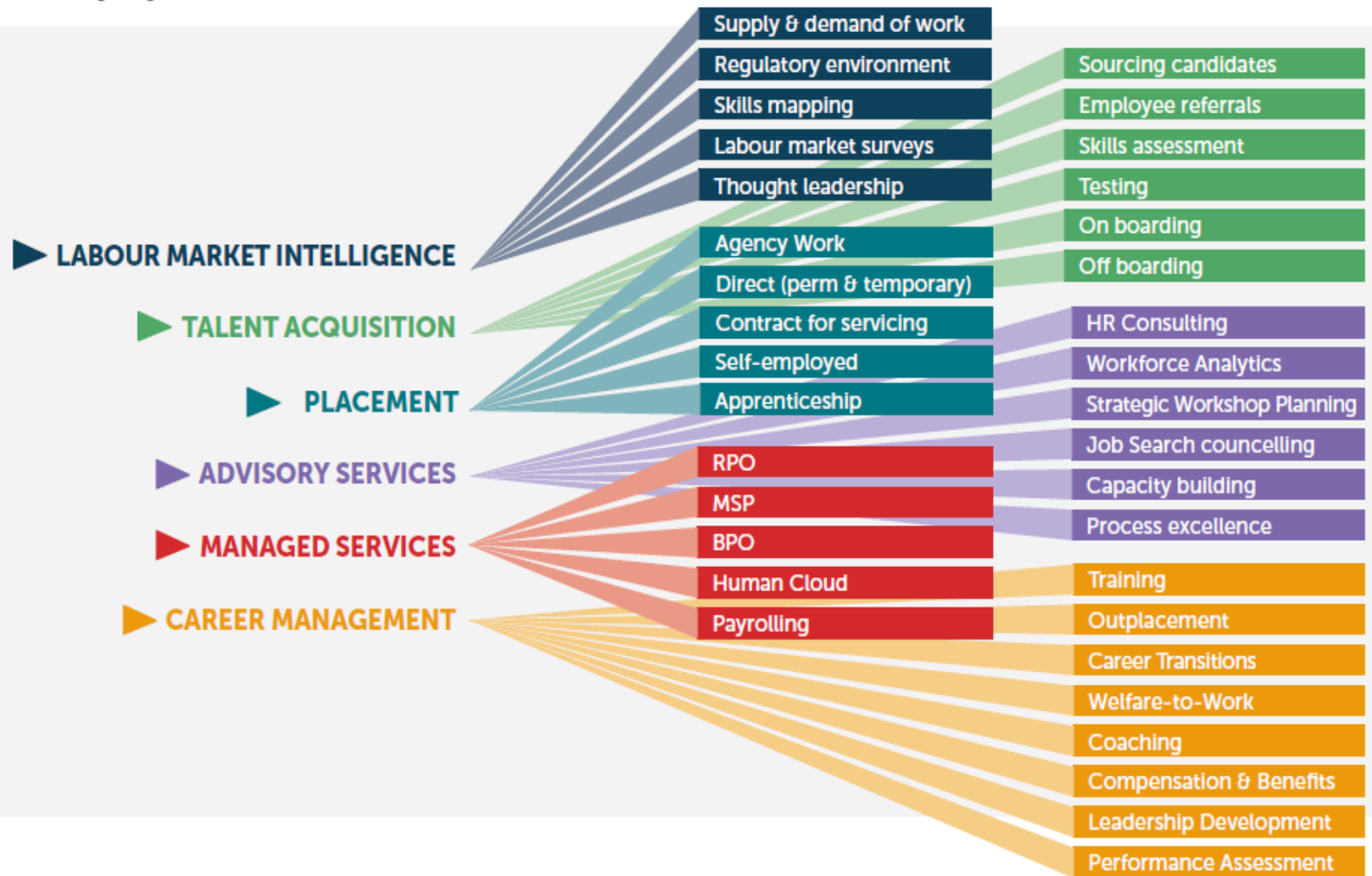
The Proof Points as labour market enablers

By enabling Work, Adaptation, Security & Prosperity, the employment industry:

- gives hope
- develops confidence
- builds trust
- delivers pride



Services delivered by the members of the World Employment Confederation-Europe





Section 01

Membership policy

30 national associations



Austria
Österreichs
Personaldienst-
leister



Finland
HPL



Lithuania
LIIA



Slovakia
APAS



Belgium
FEDERGON



France
Prism'Emploi



Luxembourg
ULEDI



Slovenia
ZAZ



Bulgaria
BG Staffing



Germany
BAP



Netherlands
ABU



Spain
Asembleo



Croatia
CPEA



Greece
ENIDEA



Norway
NHOSH Service



Sweden
SSA



Czech Rep
APPS



Hungary
SZTMSZ



Poland
Polskie HR
Forum



Switzerland
SwissStaffing



Denmark
Dansk Erhverv



Ireland
NRF



Portugal
APESPE HR



Turkey
OIBD



Estonia
EFPRA



Italy
ASSOLAVORO



Romania
ARAMT



UK
REC



Latvia
LASA



Russia
APEA

Corporate Members



THE ADECCO GROUP



ManpowerGroup™

randstad

KELLY
SERVICES



Group
YOUR JOB, OUR WORK

RECRUIT
Recruit Global Staffing



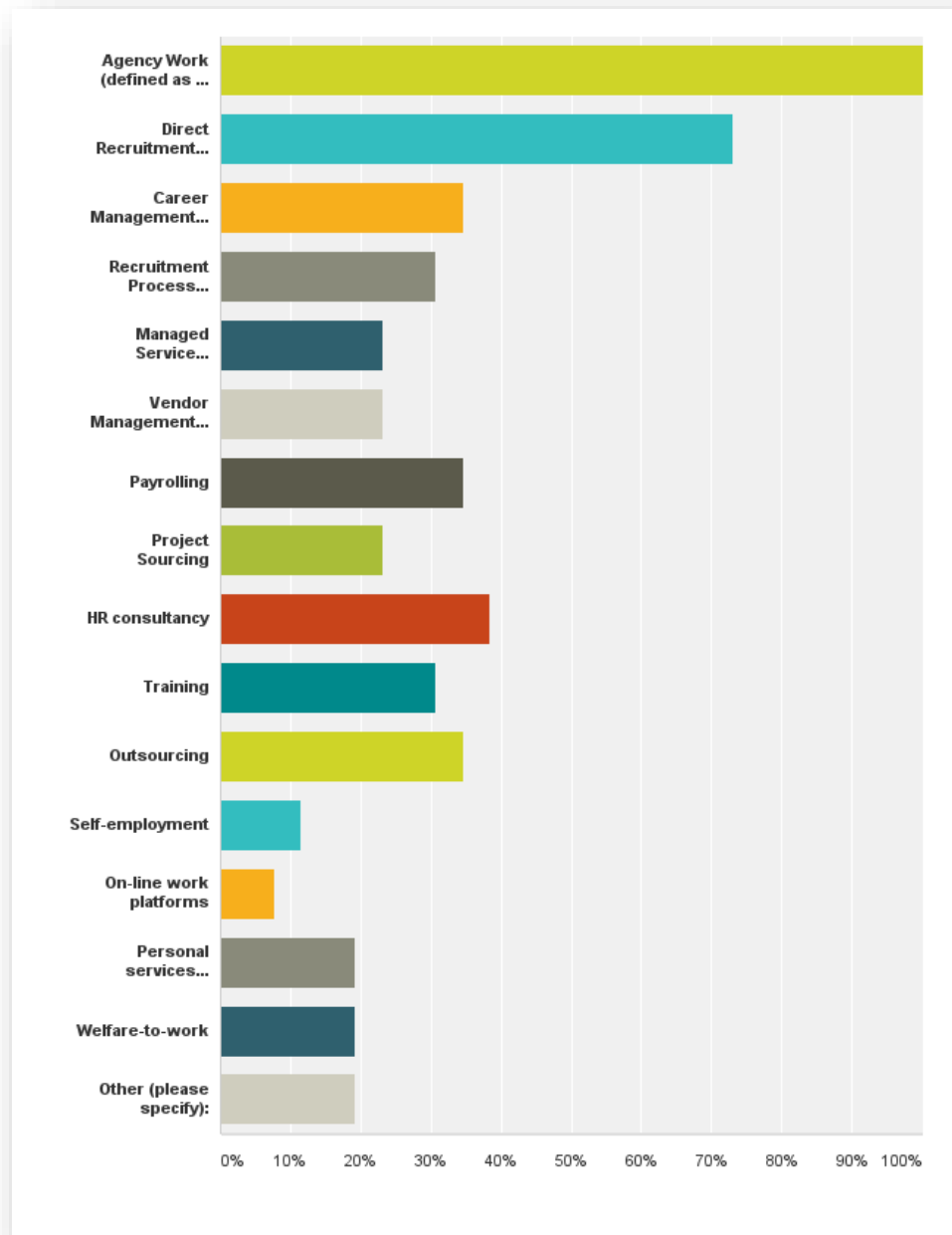
VON RUNDSTEDT

trenkwalder

HR services represented by Members

Members of the World Employment Confederation-Europe represent a large range of HR services

Agency Work being the common core one for all of them





WORLD
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CONFEDERATION

EUROPE

Section 02

Mission and Guiding Principles

What are our guiding principles



Work is an essential part of people's life and identity



Dynamic labour market need facilitating intermediaries and transitions agents



Freedom of choice in the labour market should be promoted to meet the variety of work expectations and increase labour market participation



Appropriate regulation on the employment industry is needed in order to reach a balance between workers' protection and well functioning labour markets

Our mission



Advocating (safeguarding interests)

- Lobbying
- Profiling the industry
- Dialogue with social partners



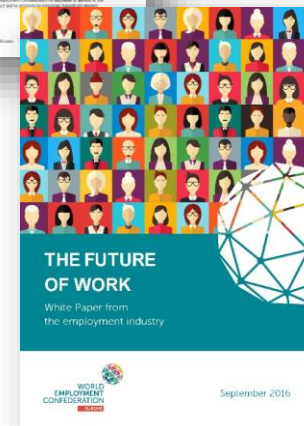
Market Development

- Membership expansion
- Capacity building
- Sharing practices
- Quality standards



Thought leadership

- Research & data collection
- Educating on changing world of work
- Conferencing
- Networking with opinion leaders

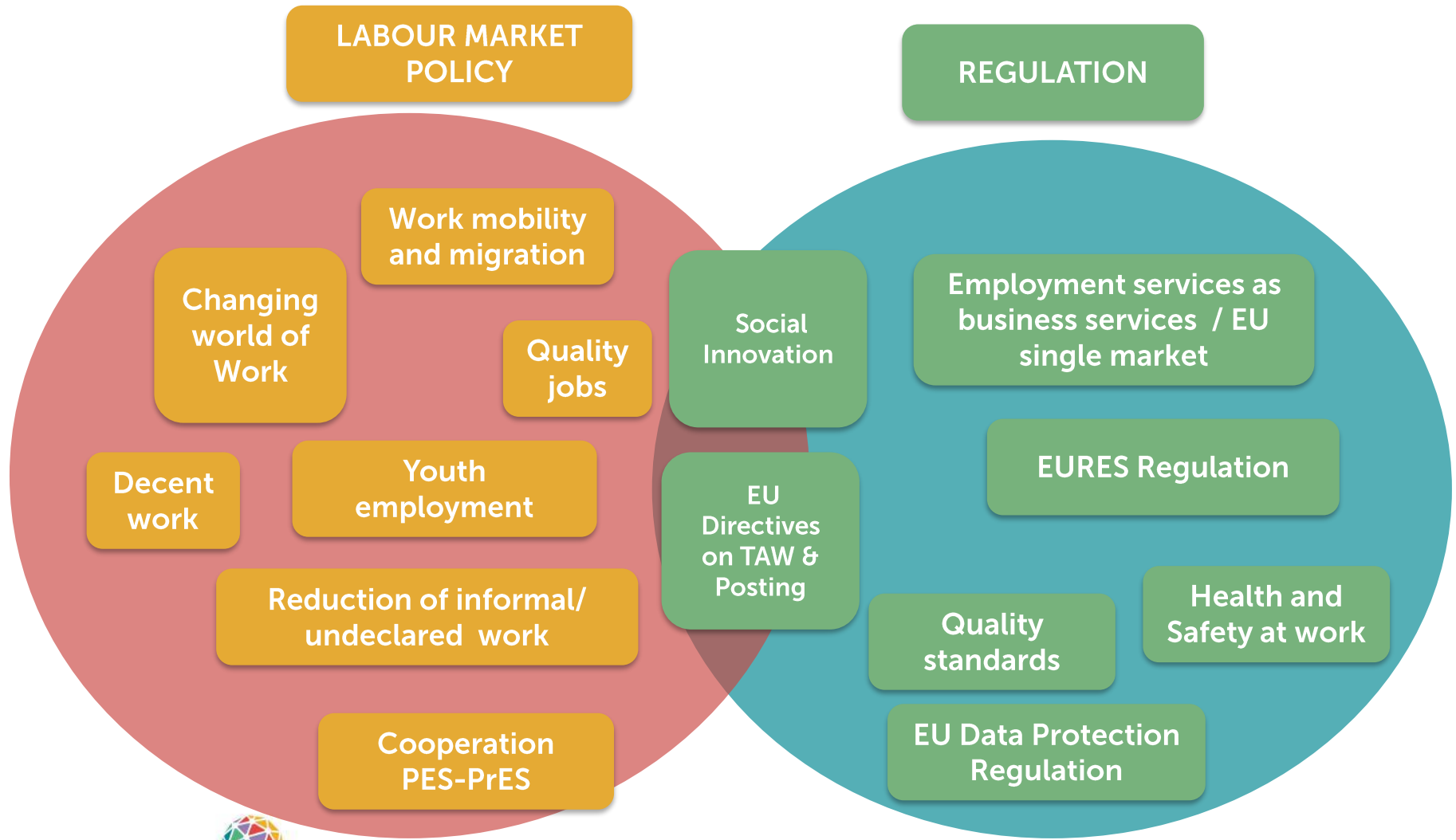


Key advocating messages

The World Employment Confederation-Europe...

- Bring together members who, as labour market enablers, facilitate access to work, adaptation, security and prosperity
- Sets the highest standards to ensure the industry is respected and reputable and seen as a critical contributor to economic health
- Supports the principle of equal pay/equal work (+ possibility of derogations) for agency workers and the free movement of workers within the EU
- Is convinced that the changing world of work require innovative workforce solutions in order to simplify the increasing complexity of the labour markets and that social innovation needs to be fostered
- Calls for appropriate regulation to be adopted on the employment industry in order to facilitate adaptation to a changing world of work
- Believes that social dialogue can play a key role in reaching appropriate regulation on the employment industry

Key advocating topics



Key European stakeholders








EU institutions










Employers Organisations







Think Tanks







Social NGOs







Trade unions









Academic world



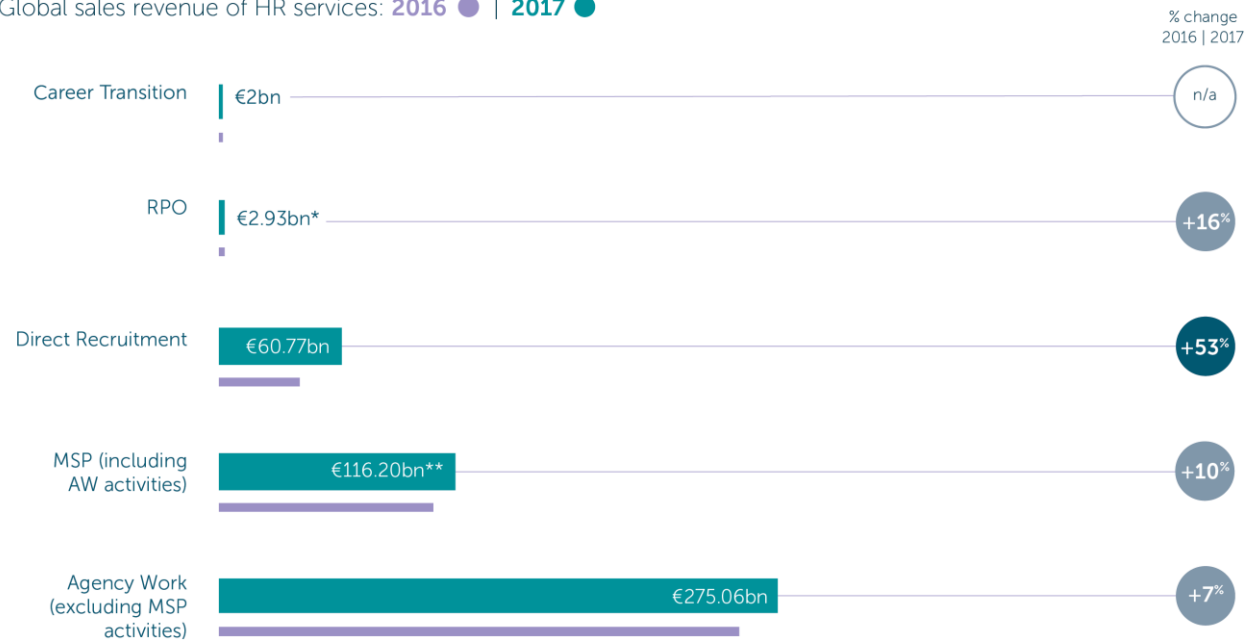
Section 03

The Voice of the Employment Industry

Private Employment Industry Global Market 2017

€457 billion revenue | 13% growth year-on-year

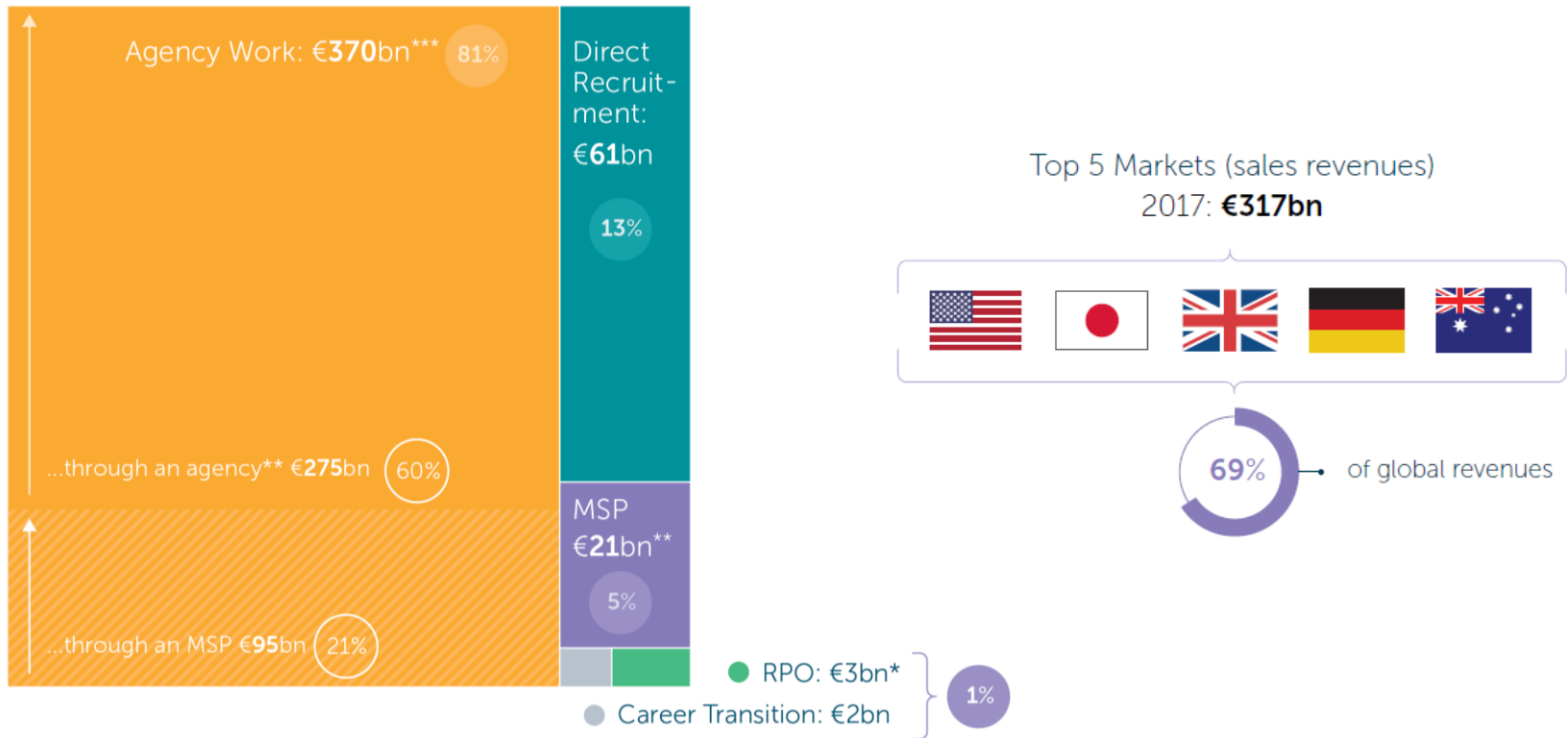
Global sales revenue of HR services: 2016 ● | 2017 ●



Private Employment Industry Global Market 2017

Agency work as core segment

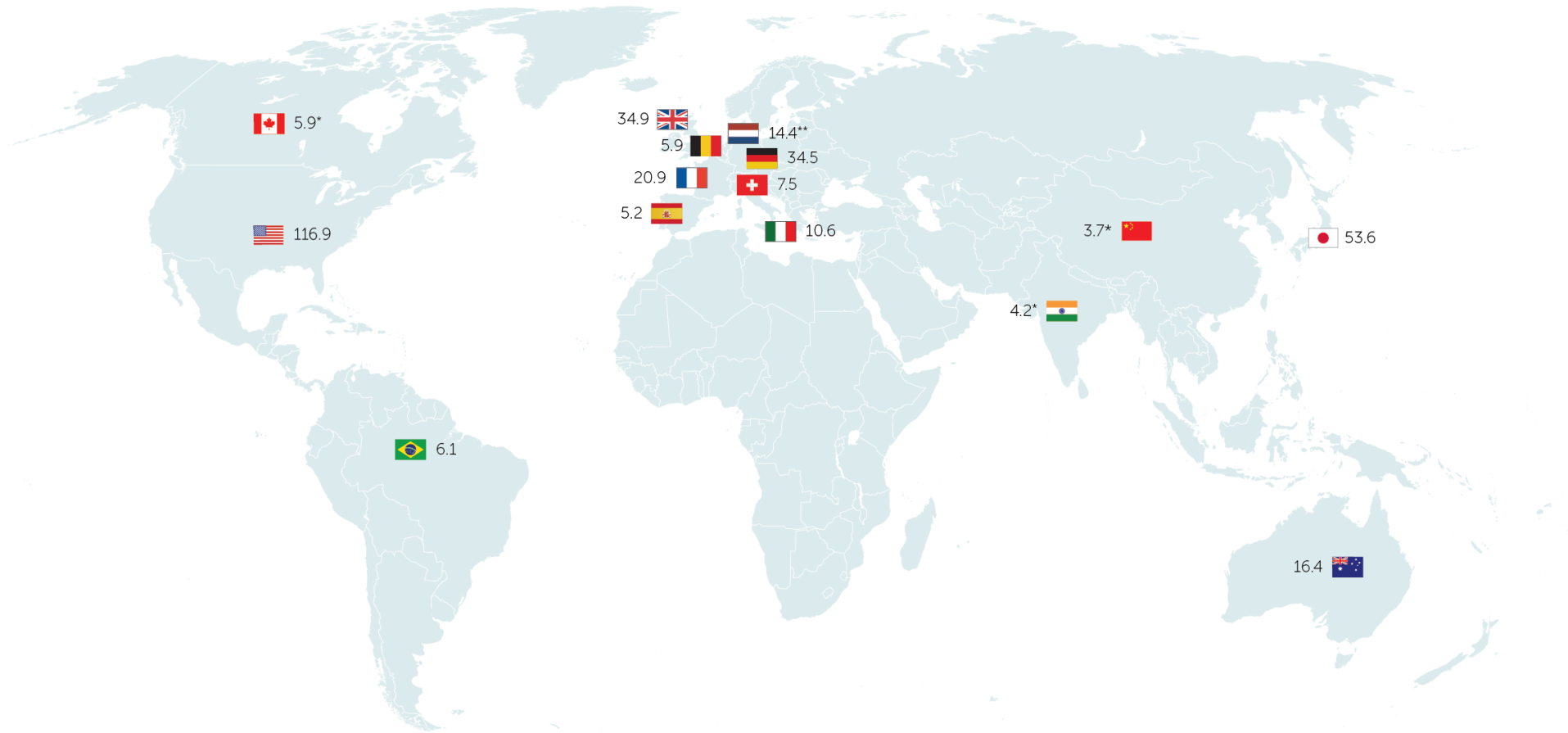
Private Employment Industry Global Market
2017: **€457bn**



53 million people were placed in labour market in 2017



15 largest markets for agency work

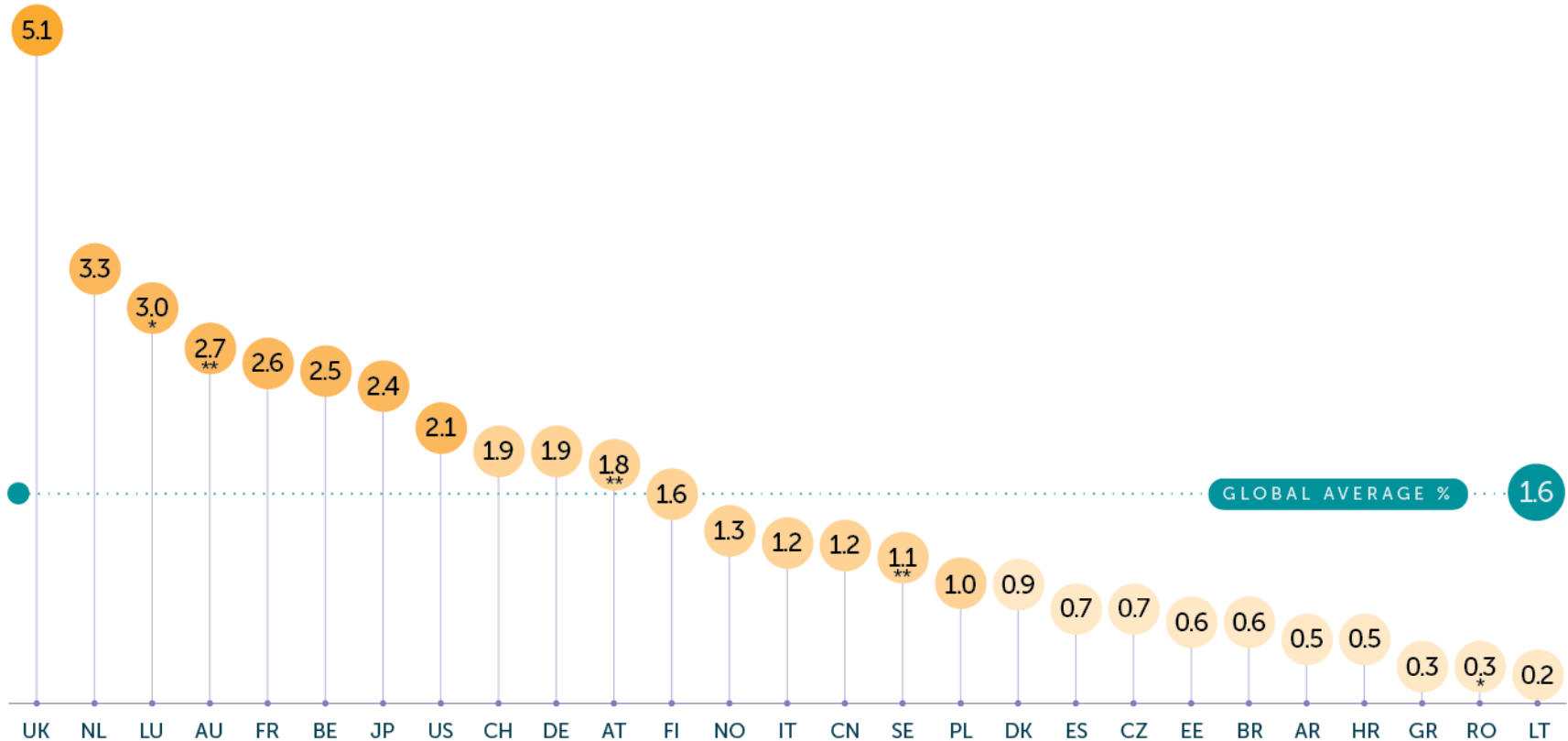


USA	Japan	UK	Germany	France	Australia	Netherlands	Italy	Switzerland	Brazil	Canada	Belgium	Spain	India	China
116.9	53.6	34.9	34.5	20.9	16.4	14.4	10.6	7.5	6.1	5.9	5.9	5.2	4.2	3.7

Agency work revenue (billion €), 2017

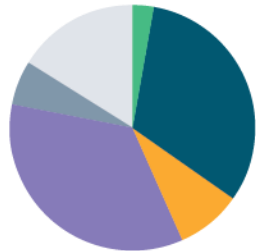
Penetration rate for agency work

Agency work penetration rate, 2017 %

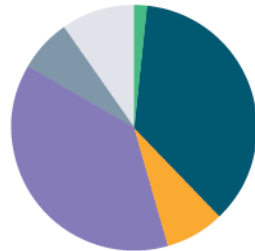


Majority of agency workers are employed in services industry

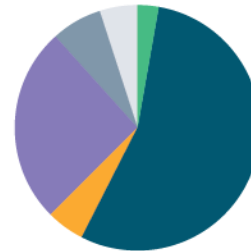
Sectoral distribution of agency workers across regions (2017)



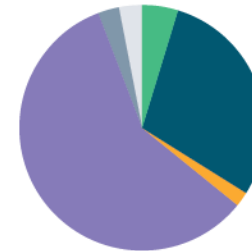
Global



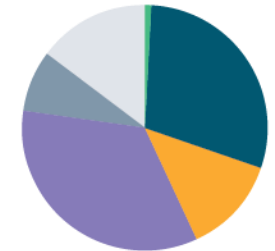
Europe



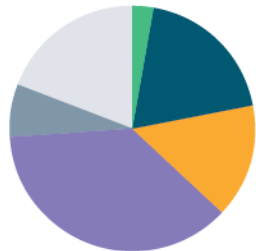
Eastern Europe*



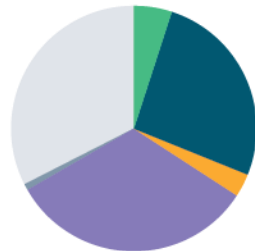
Southern Europe**



Central & Northern Europe***



Australia, New Zealand & Japan

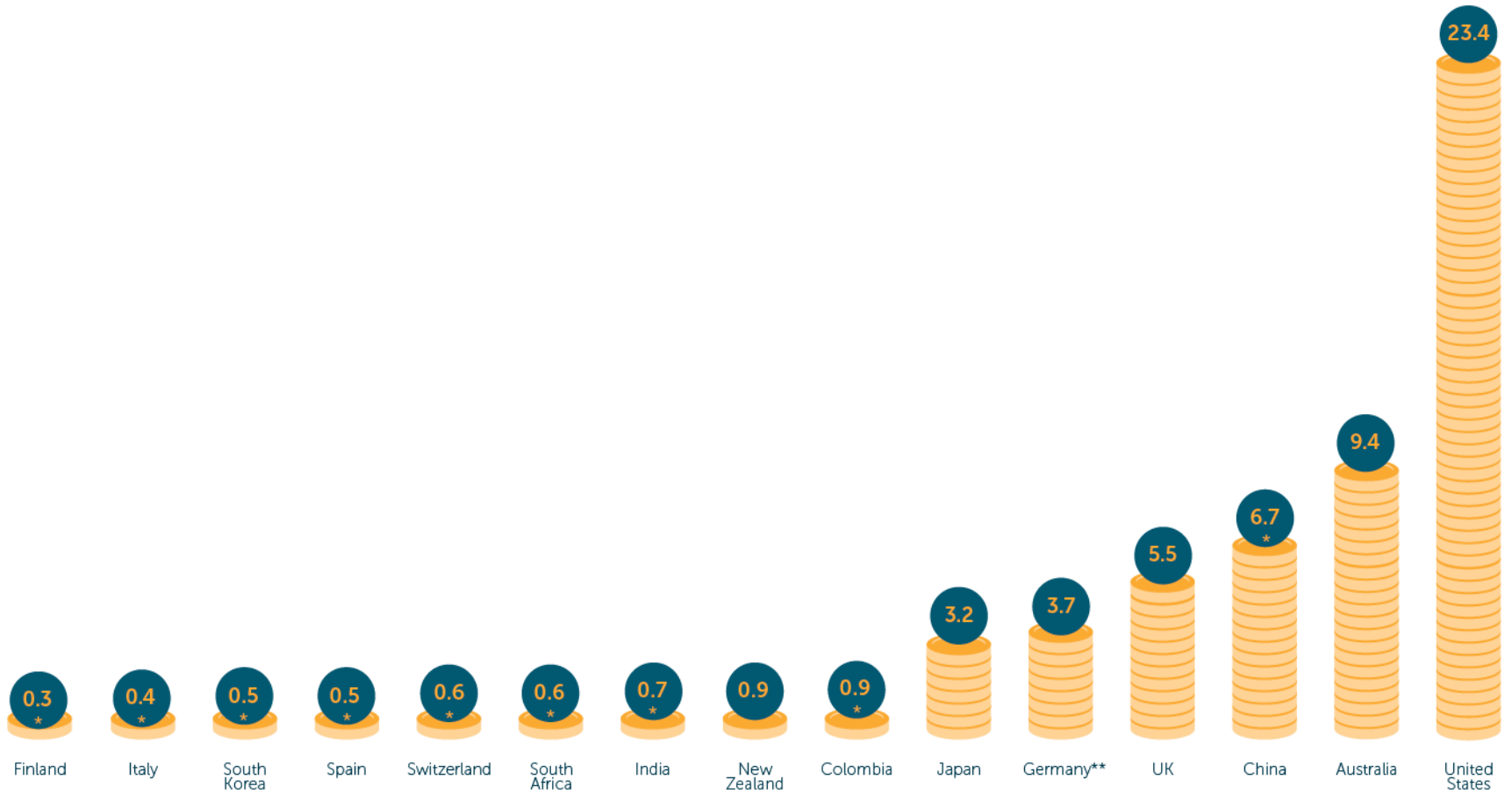


Latin & South America

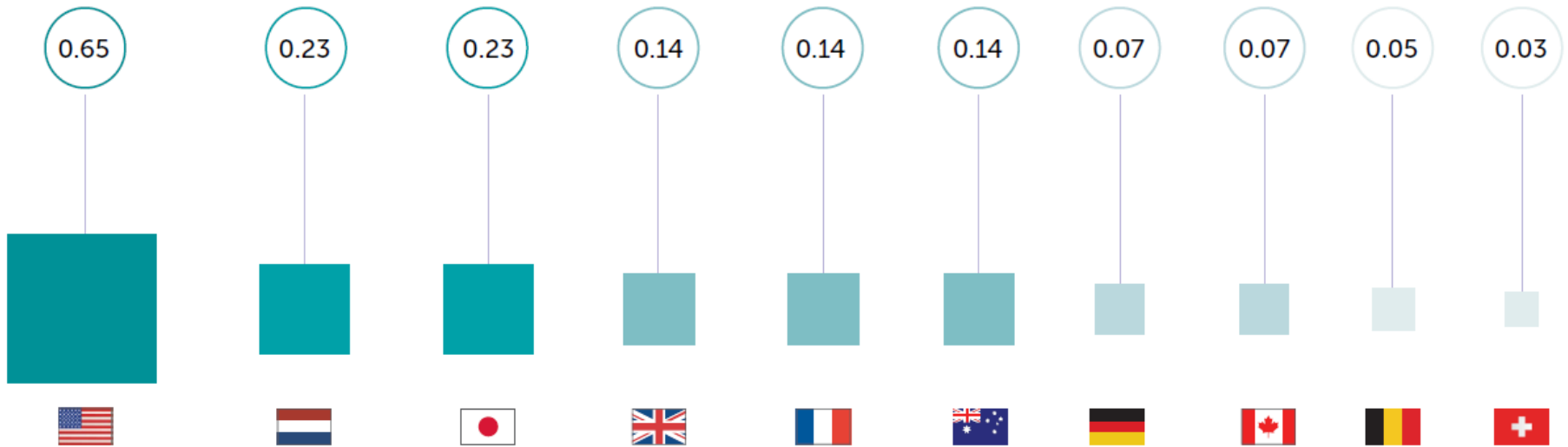
- Agriculture
- Manufacturing
- Construction
- Services
- Public Admin.
- Other

Direct recruitment

Direct recruitment turnover in the 15 largest markets (billions €), 2017

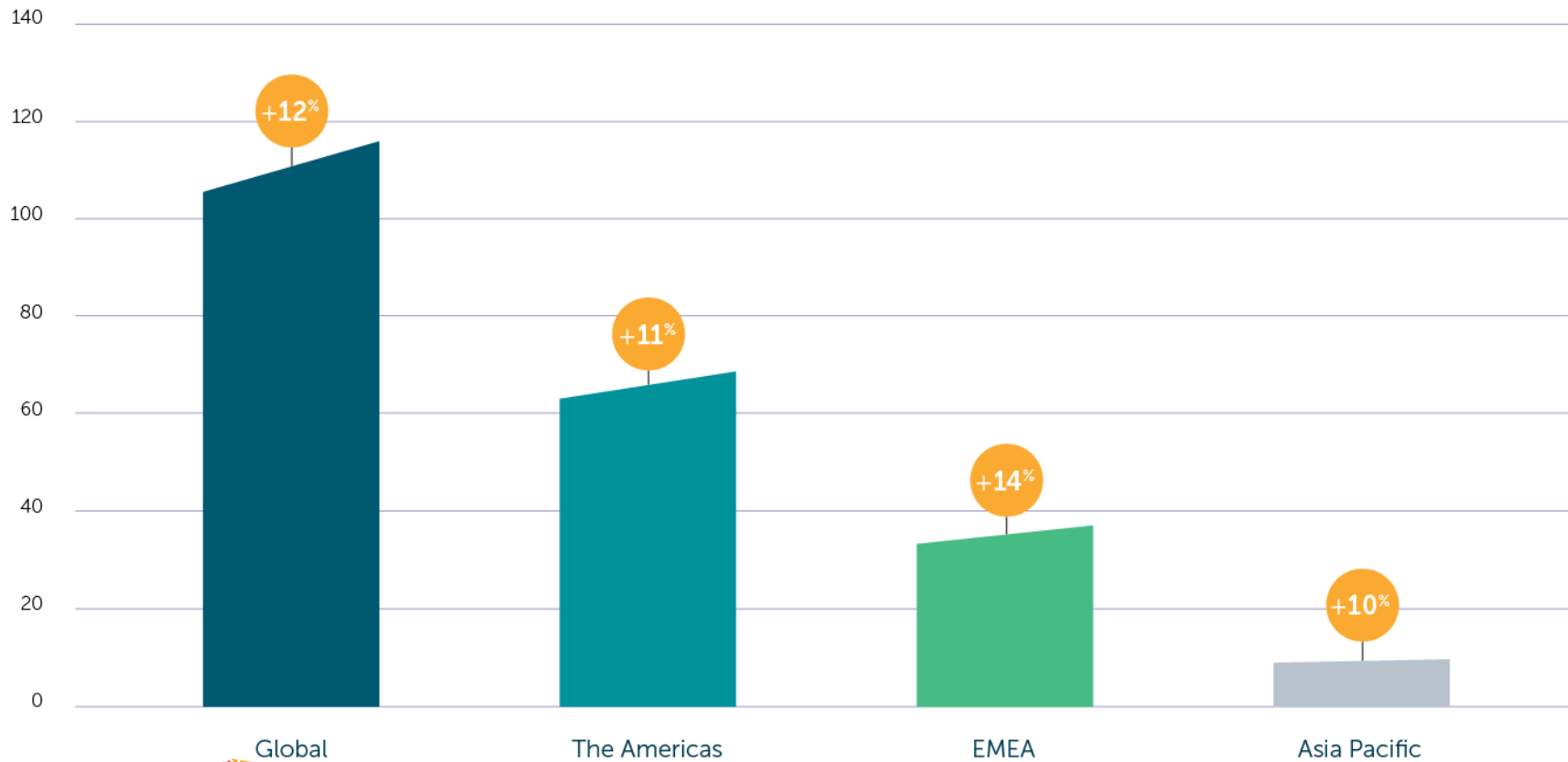


Career transition/Outplacement revenues in top 10 markets (billion €), 2017*



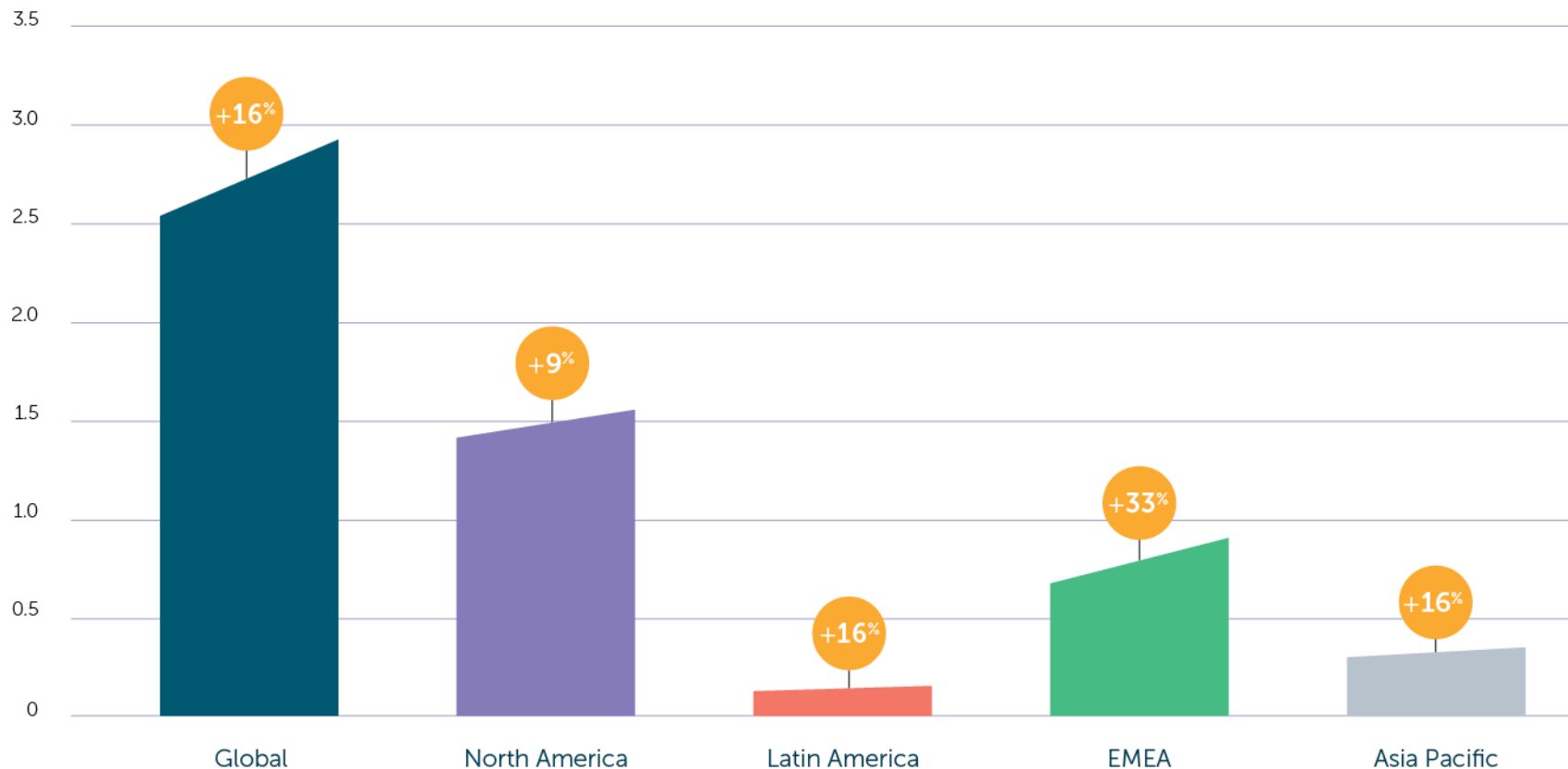
Managed Services Providers (MSP)

MSP market size, spend (billions €), 2017 - % y-o-y Change*



Recruitment Process Outsourcing (RPO)

RPO market size, net fee income (billions €), 2017 - % y-o-y Change*



North America



Countries included in figures:

 Canada






 Mexico

 US



South America

Countries included in figures:

-  Argentina
-  Brazil
-  Chile
-  Colombia
-  Peru



Europe



Countries included in figures:

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

Asia-Pacific (APAC)

Countries included in figures:

 Australia

 China

 India

 Japan

 New Zealand

 South Korea





Section 04

Governance

Decision making bodies

Governing Body
40+ members

Bring all members together
Highest-decision making body
Meet at least 2 times/year

Executive Committee
5 elected members

Balanced representation of 2 types of members)
Manage WEC-Europe
Meet at least 3 times/year

Executive bodies

Standing Committees

- European Public Affairs
- EU Sectoral Social Dialogue

Permanently established
Focus on specific activities

Taskforces

- PA issue focus
- Country focus
- Best practices sharing

Temporarily established
Focus on specific issues

Head Office

6 FTEs

Responsible for day-to-day operations, coordinating lobbying & work of committees



Governing Body

Chaired by WEC-Europe Pdt (with the support of 2 Vice-Presidents)

1 High level representative from each Member (National Federation Pdt/MD/Deputy MD & Corporate Member Executive)

Should aim at representing all HR services

Decides on medium/long term strategy

Meeting at least 2 times a year

Individual Members may be given specific tasks (budget, compliance etc.)



Executive Committee

1 President

2 Vice-Presidents (one from a National Federation & 1 from Corporate Member)

1 member (Chair of European PA Committee)

1 member (representative from a National Federation)

+ Managing Director of WEC-Europe with standing invitation to attend

Meet at least 3 times a year to ensure execution of strategy decided by Governing Body

WEC-Europe Executive Committee



Bettina Schaller
(The Addeco Group)

President



Maalfrid Brath
(Manpower Group)

Vice-President



Jurriën Koops
(ABU/
Netherlands)

Vice-President



Sonja van Lieshout
(Randstad)

Chair PA Committee



Agnieszka Zielinska

Executive Committee Member



+ Standing invitation for Managing Director of WEC-Europe



Standing Committees

Public Affairs + EU SSDC

Permanent bodies

Always chaired by a Member



Taskforces

Policy/topical experts from each Member who can/wants to contribute

Taskforce output always linked to Governing Body decision making.

Taskforces are driven by a mixture of Head Office and Members' input, and can be chaired by either

Taskforce composition depends on the topic: could be country, best practice sharing or PA issue focused

Taskforces should have by definition a limited duration

Meeting frequency depends on the topic and goals of the Taskforce

Standing Committees

Public Affairs

Coordination of EU Advocacy and European Public Affairs, exchange and best-practice sharing on national issues



Chair:
Sonja van Lieshout
20 Members

3 Meetings per year

EU Sectoral Social Dialogue

Dialogue with UNI-Europa
EU policies, regulation and joint research



Chair up for election:
Sebastien Delfosse
20 Members

3 Meetings per year

Coordination function for both committees with Michael Freyag (Head Office)

Issue Taskforces

Currently no country-specific Taskforces. These will only be set up on request of and in cooperation with National Federations concerned

Taskforce EU Data Protection Regulation

No formal chair
10 Members

Taskforce on EU Directive on transparent and predictable working conditions

Chair / coordinator:
Sonja van Lieshout
6 Members





Section 05

Services to Members

5 key Services to Members



WEC Head Office Responsibilities' split



Denis Pennel
Managing Director

Management
+ Thought Leadership
+ Governance & Financials



Jochem de Boer
*Global Public
Affairs Manager*

Global Public Affairs +
Quality Standards +
CMC & MSP Taskforce
coordination



Michael Freytag
*European Public
Affairs Manager*

European Public Affairs
+ EU Social Dialogue
Committee
coordination



Gabriella Coorey
*Events & Membership
Manager*

Events coordination &
Membership relations +
NFC Coordination



Aurélie Pattyn
*Communications
Manager*

Communications & PR +
Career Management
Taskforce coordination



Robin Lechtenfeld
*Labour Market
Intelligence Officer*

Data collection & Research
+ Economic Affairs Cttee
coordination

Our unique selling proposition



Advocating for fit regulation



Reaching out European stakeholders



Enabling business development (opening up new markets)



Accessing market data & research tools



Sharing practices and networking



Recognition & visibility



Thought leadership on changing world of work





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