

Randstad summary

People to jobs, jobs to people



global mobility and labor migration

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Preface

Significant talent challenges are looming over the next decade. In many countries and sectors shortages of available talent are already being felt. Economic growth expectations coinciding with projected waves of retirements will force employers to find, attract and retain scarce talent. Part of the solution to these skill shortages could be well-managed talent mobility of those who have the right skills.

The changes we are experiencing in this digital age raise profound issues on how to adapt labor market policy and institutions, including global mobility, decent flexible work arrangements and social security, in order to provide adequate security for workers while exploiting the potential of the new ways of working to enhance opportunities.

Labor migration issues in particular, raise complex and sensitive political, human rights, economic and social concerns, as well as an array of legal and regulatory challenges. Migration accordingly occupies a prominent place on both national and multilateral policy agendas, and in public discourse and debate.

Randstad is pleased to attribute to the public discourse with the 'People to jobs, jobs to people' research. Commissioned by Randstad, the IZA Institute of Labor Economics in Bonn has studied the determinants of worker migration, highlight expected changes in labor supply of targeted migration flows and offer a comprehensive discussion of firms' (re)location choices to investigate the potential of job flows in response to skills shortages.

Our aim in presenting this accompanying paper is a summary of the research and put it in context to help organizations and policymakers to better understand the shifts currently taking place in the global labor market and how talent mobility can help us address some of the challenges ahead.

Jacques van den Broek
CEO, Randstad nv





I. Introduction

The Information Age is affecting the workforce in several ways. The balance among employment sectors – and the kinds of skills they require – has been shifting. As a result, a mismatch has arisen between the skills that are in demand on the labor markets and those that are available.

Training or managed migration

Traditionally, one way of solving such mismatches between the supply and demand of skills has been to train people at the desired location to acquire the missing skills and then supply them. Of course, such reskilling can play an important part in solving the problem, but, realistically, it is not enough. A complementary solution to the mismatch could be the managed migration of those who have the right skills. Viewed in this light, the real problem for the world

economy is not a global shortage of skills (mostly in STEM: Science, Technology, Engineering and Mathematics) but a location mismatch between employers and employees. Talented people are often not in a position to move to where the jobs are. The global labor market is already here, but we need to manage it better to make it work effectively.

Profound impact

Of course, labor migration is by no means a new phenomenon. ▣



The movement of labor locally, regionally and globally has always been an important dynamic in every economy. Without it, there would be huge skills mismatches everywhere. Certainly, in many developed markets, the demographics are clear: without a steady inflow of workers and skills from elsewhere, they face an impending talent crisis as their population becomes older. Now, as global attention turns to controlling migration, there has never been a more important time for us all to make sure we clearly understand how policy-making can have a profound

impact on the well-being of a labor market.

'People to jobs, jobs to people'

In 'People to jobs, jobs to people', a research project carried out by IZA Institute of Labor Economics and Randstad, it is suggested that one effective way of offsetting impending skills shortages could be this careful management of skilled migrants. Facilitating labor migration may help to ease potential labor shortages substantially, and contribute to a competitive economy, with growth and jobs. Coherent

migration policies, especially policies that systematically deal with skill-specific demands on the part of the national economy, will provide substantial benefits. Already, for many companies, access to qualified personnel is a key determinant in deciding where to locate their activities. Given the expected demographic developments in Western societies, paired with the technological progress being made in many non-Western countries, this trend can only be expected to increase over the coming years.

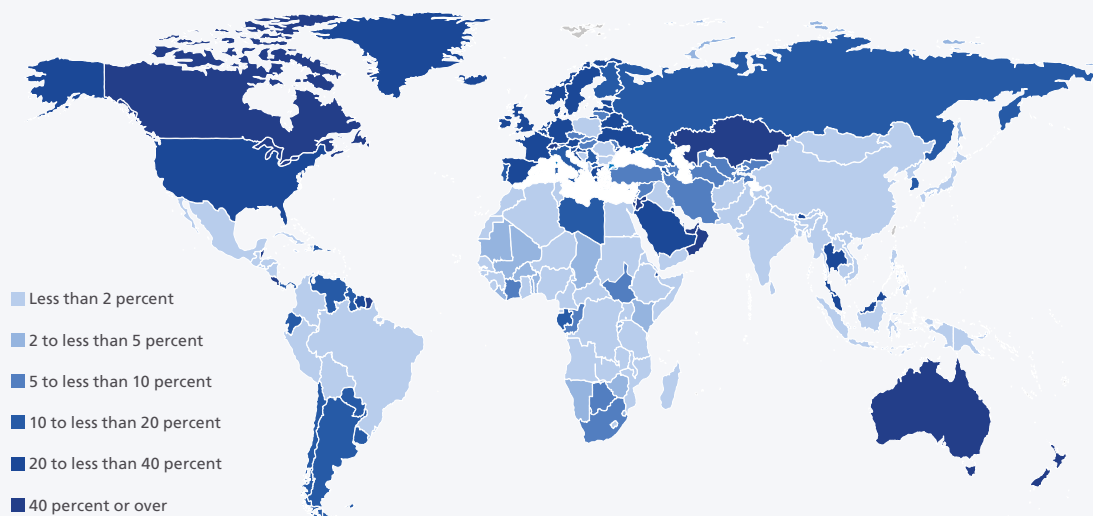
Categories of migrants

In this paper, we are concerned with skilled migrants who enter a given country legally and have the necessary documents to enable them to work. They should not be confused with other types of migrants, such as refugees or asylum seekers fleeing conflict and persecution, or with those who enter and try to stay in the country illegally, for whatever reason. However, that does not mean that businesses or employers have no responsibility with respect to these groups who appear on the labor market of the country in which they find themselves. We believe that companies should undertake activities to support those who are legal migrants to find their way on to the job market in an appropriate way. ■



II. Background

Share of migrants in total population (2015)



Source: UNDESA, International migrant stock: The 2015 revision

2.1. PATTERNS OF MIGRATION

In 2015, approximately 244 million people were living in a country other than the country they were born in.¹ Most of them had gravitated to places where they believed they would find jobs and opportunities. Approximately 65 percent of them were residing in developed economies. In fact, about half of all migrants globally had moved from developing to developed countries, making this the fastest-growing type of migration flow.

Origins and destination

Where did these people come from? Roughly 80 percent of the world's migrants originally hail from developing regions. The top three regions of origin are developing Latin America, developing Eastern Europe, and Central Asia. The leading countries of origin, for their part, are the Middle East and North Africa, India, Mexico, and China. Although migrants come from all corners of the globe, their destinations are more

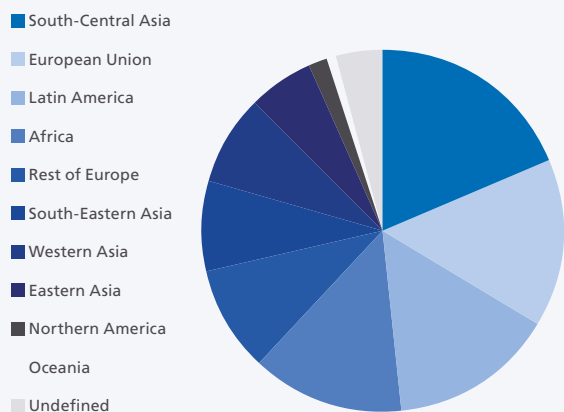
concentrated. Just five regions – Western Europe, North America, the Gulf States, Oceania, and developed East and Southeast Asia – have collectively attracted 87 percent of the 160 million migrants who reside in developed destinations. In sheer numbers, the United States tops the list of destinations. In 2015, it was home to some 47 million immigrants.²

2.2 THE DEMOGRAPHIC CHALLENGE

Many advanced countries around

Origin and destination countries of migrants

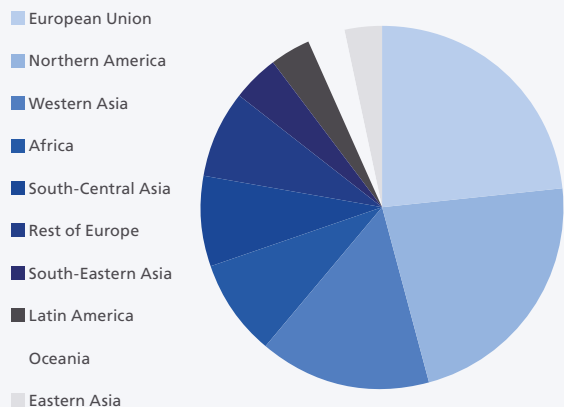
Origin of migrants (millions)



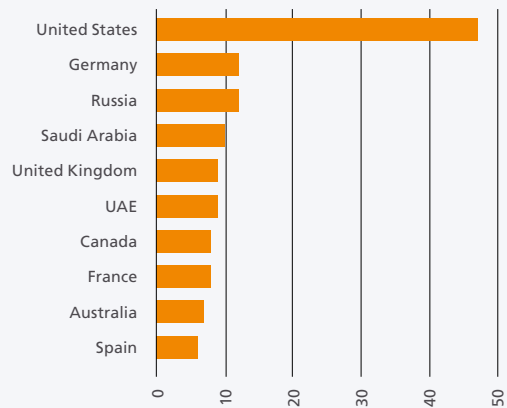
Top 10 origin countries



Destination of migrants (millions)

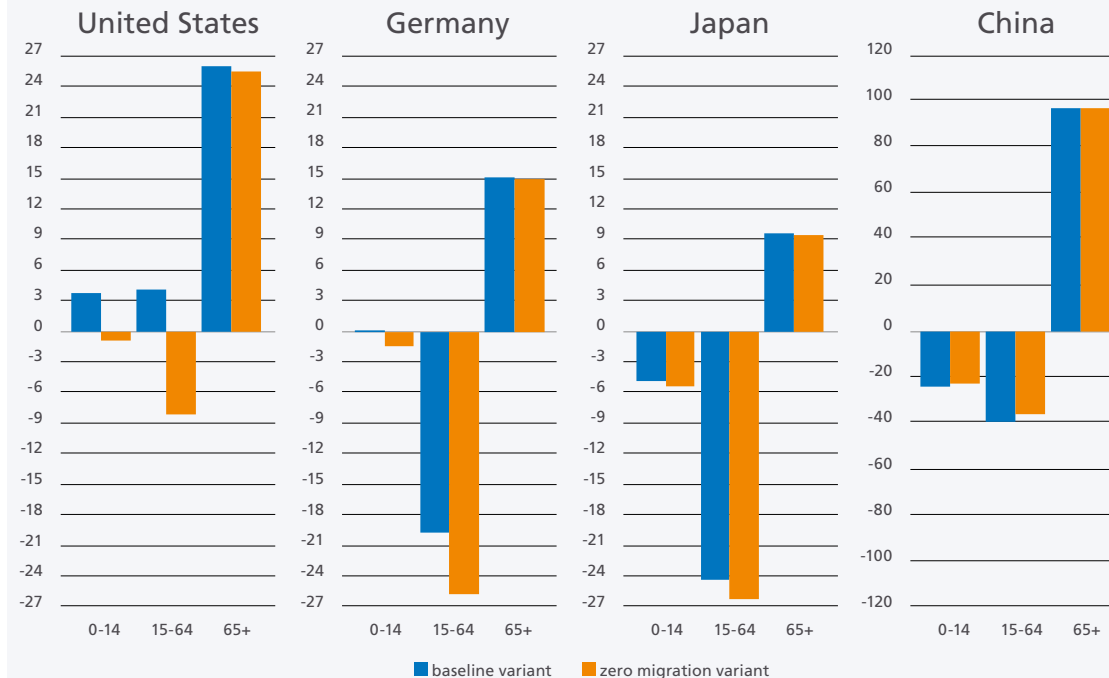


Top 10 destination countries



Source: UNDESA, International migrant stock: The 2015 revision

Change in population 2015-2030 by age group (in millions)



Source: UN population division, World population prospects 2015

the world are facing what has been called a “demographic time-bomb”. Large numbers of workers are beginning to retire as the post-World War 2 generation turns 65. At the same time, birth rates are falling. On top of this, the workforces in these countries are experiencing severe skills shortages. Naturally, governments and businesses are concerned about how this situation will affect their own economies. In the Northern hemisphere, the expected talent gaps will be caused

mainly by demographic shifts – notably, the retirement of baby boomers. For example in the United States, Germany, Canada and the United Kingdom, but also in Japan and China expected birth rates will not balance the workforce losses caused by aging populations.

Funding pensions and healthcare

An aging population will pose a challenge for public budgets and pension systems and also for healthcare systems. Improving

the old-age-dependency ratio is of critical importance to countries like Germany, Spain, Canada, and the United Kingdom, where most public pensions have a pay-as-you-go structure, and worsening dependency ratios threaten to make many pension plans unsustainable. The falling share of the population at what are traditionally productive ages means that relatively fewer people will pay taxes and social contributions at a time when the rising proportion of elderly people implies that more people will be receiving pensions and need costly health services. In response, many countries have implemented reforms, such as a rise in the retirement age, designed to slow down the rate at which pension costs rise. More

serious concerns relate to public healthcare expenditures, which, in most countries, are rising faster than pension expenditures.

Skilled migrants as driver of labor market growth

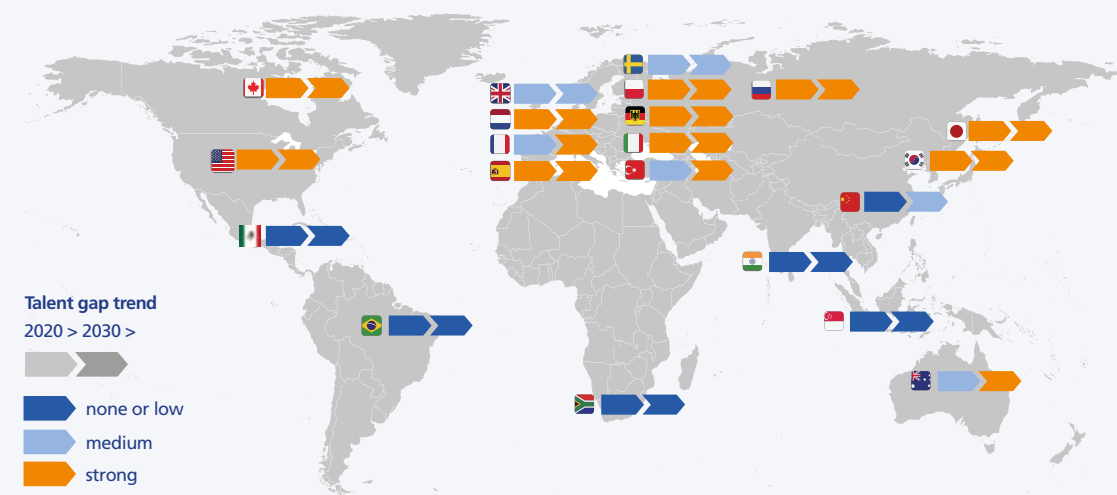
For many countries facing dire demographic changes, there is little they can do about the aging of their population. While some countries have started encouraging their younger citizens to have more children, these efforts are unlikely to make much difference in growing their indigenous workforce. Government incentives, such as tax credits and free childcare services, are often unable to overcome shifting societal attitudes and economic conditions. A more effective approach to ensuring a sufficient workforce is to develop a sound migration policy that attracts the talent the country needs. The presence of both first- and second-generation migrants can help combat such unfavorable demographic trends, particularly because migrant groups tend to be young and have higher fertility rates than native-born populations in these countries.

2.3 GLOBAL SKILLS MISMATCH

The growing skills gap around the world is spurring leaders in many sectors to sit up and take action. Companies are expending more effort to acquire talent and retrain employees. Governments

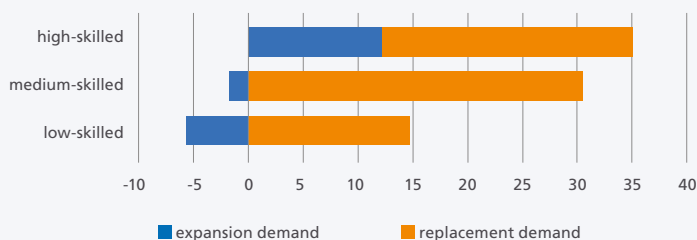
Global location mismatch of skills

The skills are available, just not on the right location.



European Union: job demand towards 2025 (in millions)

In the European Union 35 million new high-skilled workers are needed in the coming years as a result of expansion and aging.



Source: Own calculations based on CEDEFOP, forecasting skill demand and supply

are boosting spending on similar programs. Academic institutions are actively steering students into future-safe careers. Never before have the private and public sectors been more collaborative in addressing a looming workforce challenge.

CLOSING THE SKILLS GAP

Nevertheless, the skills gap continues to grow. **Consider the following:**

- Randstad Sourceright's Q4 2016 Talent Intelligence Outlook survey of more than 400 human

capital leaders found that 44 percent plan to increase spending on reskilling workers. ■ In its 2017 global survey of CEOs, PwC reported that 77 percent are concerned about the availability of skills, second only behind economic uncertainty and over-regulation.

- A recent Deloitte survey found that 39 percent of executives at large companies were barely able or unable to find the talent they required. What does the inability to close

the skills gap mean for markets around the world? In the United States, billions of dollars are lost each year in productivity because companies can't fill vacancies. Last year, the U.K. Science and Technology Committee within the House of Commons found that a digital skills gap cost the country's economy £63 billion. Retention is a growing problem in Asia as talent mobility rises, leading to pressures on companies in the region. As the gap grows, repercussions can be expected to grow louder. ■

The speed of change

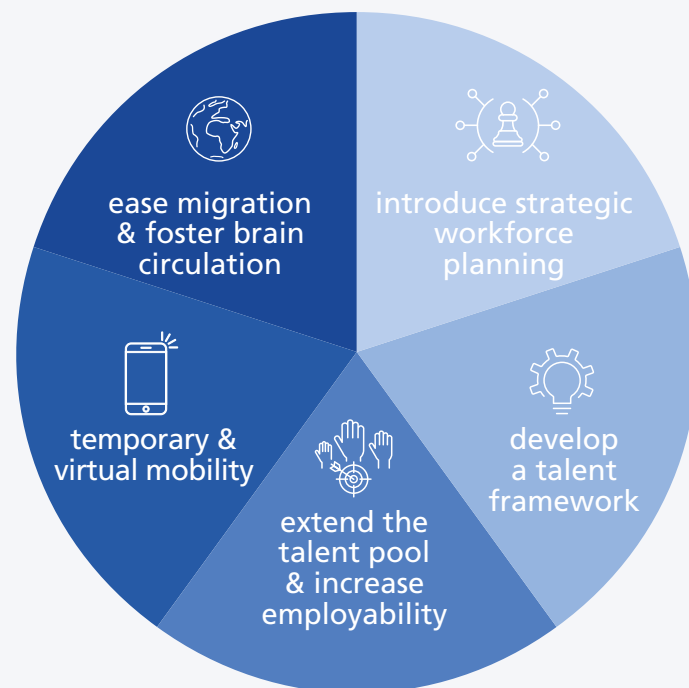
The problem is being exacerbated by the fast-moving, global, post-digital economy, which seems to transform so often and so quickly that the skills of today's university graduates are already obsolete by the time they join the workforce. Today, huge gaps exist in some of the most dynamic sectors, such as IT, engineering and healthcare. At the same time, large portions of the population in industrialized nations are facing unemployment and underemployment due to factors such as offshoring and automation. So while in some industries the skills gap is rising, in others it is negligible.

Reskilling – or something more?

So what is the answer to resolving the skills-gap dilemma? The future of the global economy rests on the efficacy of a number of solutions. These include retraining existing workers, encouraging students to pursue new-economy careers, enticing older workers to remain active in the workforce, utilizing more contingent workers and turning to robotics and automation. Businesses and governments are engaged in multiple partnerships to close this skills gap to ensure that all those who are willing to work

Responding to skill shortages.

Global mobility and labor migration is one part of the total strategy to attract and retain the skills needed in the Future of Work.



will have opportunities to do so. Such efforts include educational reform, apprenticeships, diversity and inclusion programs, and reforms to labor market policies. Reskilling is, of course, an important element in this whole, but realistically, on its own, it is not enough. Mobility of talent across borders is a small but important piece of maximizing global economic opportunity.

The effect of migration on economic growth

When workers move to higher-productivity settings, global GDP is boosted. McKinsey Global Institute for instance, estimates that migrants contributed roughly \$6.7 trillion, or 9.4 percent, to global GDP in 2015. Both high- and low-skilled immigrants contribute to productivity and labor force growth in destination countries. Migrants of all skill levels have a positive impact on productivity. In fact, according to these estimates, the contribution to global GDP output made by low- and medium-skilled migrants together is about the same as that of high-skilled migrants.

2.4 DIVERSITY

In the increasingly global marketplace, organizations have many choices when it comes to talent. Aided by labor mobility and migration, dissolving borders and the proliferation of virtual workplaces, many companies no longer feel bound by geography when seeking out the critical skills they need. With an ever-expanding talent pool, they can source the best from anywhere around the world.

The benefits of a diverse workforce

This newly found freedom often comes with an overlooked

What does talent want?

The global talent of tomorrow believes in inspiration, mobility and diversity.



benefit: greater workforce diversity. As companies seek out talent around the world, they will inevitably gain from a more diverse group of workers, whose varying race, gender, ethnic background, age, and sexual orientation give their employers interesting new viewpoints. With a more diverse workforce, companies become more representative of their customer base, tend to be more

innovative in their thinking and produce stronger business outcomes as a result. Despite the obvious benefits of diversity, many organizations are still finding it difficult to attract more talent from among minority groups. It is, however, encouraging that they are trying, and as they increasingly look around the globe for talent, they are increasingly likely to be more inclusive in their hiring practices. ■



III. 'People to jobs, jobs to people'

Migration has recently become political tinder. It is therefore high time for organizations and policymakers to make sure that they fully understand the dynamics of talent mobility and the impact it has on developing and mature economies. This has become an issue for markets worldwide, because the way immigration is viewed and controlled could have significant reverberations on markets for generations to come.

Randstad attributes to the public discourse

However, migration in the wider sense has recently become a polarizing issue, as many markets have expressed concerns about opening their borders to foreign nationals. But policymakers and indeed the general public need to clearly separate labor migration from migration due to political and economic factors. When authorities consider migration policies, they should develop sound regulations that attract the skilled workers and overseas students they need to

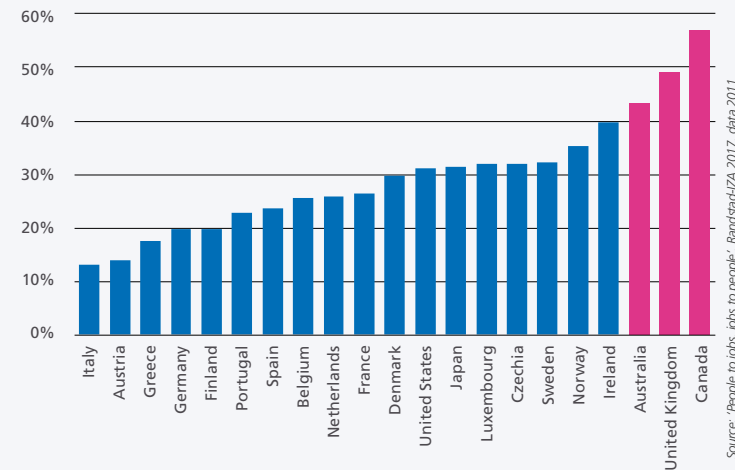
sustain local economic growth. In this context Randstad is pleased to attribute to the public discourse with the 'People to jobs, jobs to people' research. Commissioned by Randstad, the IZA Institute of Labor Economics in Bonn has studied the determinants of talent migration, highlight expected changes in labor supply of targeted migration flows and offer a comprehensive discussion of firms' (re)location choices to investigate the potential of job flows in response to skill shortages.

3.1 WHAT MOVES TALENT?

Political implications aside, there are many economic facets to talent migration requiring examination. The 'People to jobs, jobs to people' research shows that the movement of labor is a complex phenomenon, determined by an array of factors, some of which are as yet little understood. The result was a comprehensive examination of the factors that push and pull workers to seek employment outside their home countries. ■

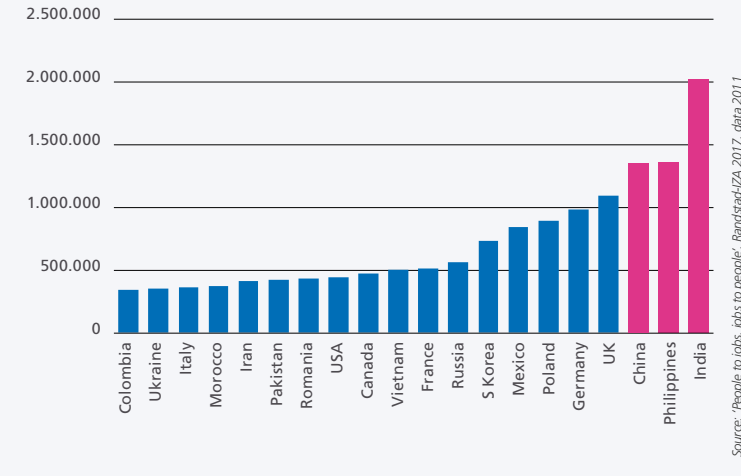
Share of high-skilled migrants in total migrant population

Canada, the United Kingdom and Australia have the highest share of high-skilled migrants in total migrant population



Number of high-skilled migrants by country of origin

Top source countries of high-skilled migrants are in Southern and Eastern Asia



Migration intentions

Overall, the extent of migration intentions and their determinants vary considerably across regions and skill groups. However, several unifying themes emerge. First, highly-educated individuals are most likely to express migration intentions, desires, and aspirations. Previous stays abroad or networks of family and friends in foreign countries are robust determinants of migration intentions.

About 58 percent of the variation in the stock of high-skilled migrants can be attributed to push

factors in the country of origin; correspondingly, only 42 percent of this variation is due to pull factors in the receiving country. Among the pull factors, economic variables – such as tax rates, average wages, unemployment rates, and GDP growth – largely account for differences in the magnitude and the composition of migration stocks across countries. In particular, high average wages and low tax-rates in the host country are positively correlated with the number of high-skilled immigrants as well as English being the native tongue. ▣

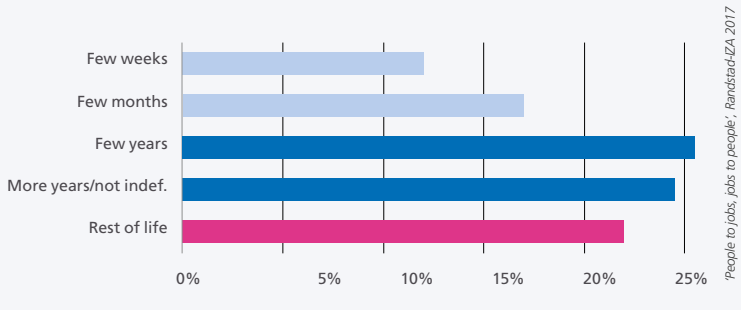
What makes a country attractive for high-skilled migrants?

Pull factors of country of destination	Impact
High average wage	++
English speaking	++
Low tax-rates	+
High unemployment benefits	=
High employment protection	-
High union density	-
High minimum wage	-

Source: 'people to jobs, jobs to people', Randstad-IZA 2017

Expected duration of stay among respondents with migration intentions

Labor migration is mostly circular. Less than 25% among respondents with migration intentions expect to stay abroad for the rest of their life.



These factors affect not only the amount of labor migration but some of these considerations also help determine how long an migrant remains in the host country. For example, the research showed that the majority of expatriates eventually return home (although they may later also return to the same or a different country).

3.2 PROJECTING DEVELOPMENTS IN LABOR SUPPLY AND DEMAND

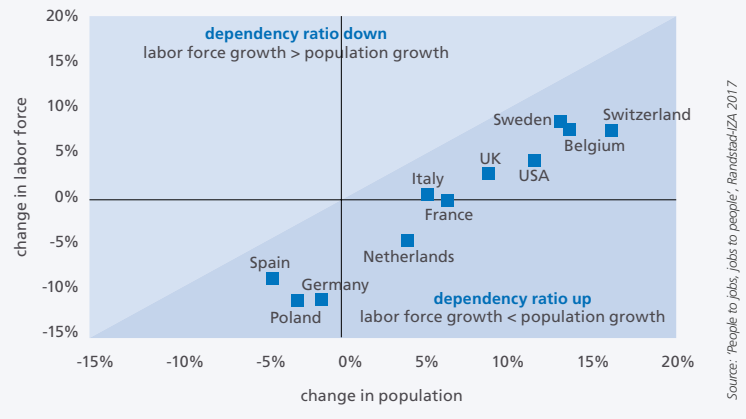
The projections indicate that the population as a whole is likely to increase in seven out of the ten countries investigated. Only in Germany, Poland and Spain is the population likely to decline. When we look at changes in the working population (as defined by the number of individuals aged 15 to 64), we see a gloomier picture. In

all countries the size of the labor force is predicted to increase more slowly or decrease more strongly than the overall population. This implies a general aging of these societies and increasing dependency ratios, as a smaller share of individuals in the overall population is working.

Migration policies play key role

However, the general trend in aging is accompanied by steadily increasing educational attainment. Over time, a greater share of the workforce is predicted to receive tertiary education. According to the projections, changes in hours worked will exceed expected changes in the size of the labor force. For countries whose labor force is decreasing, losses are thus partially mitigated by behavioral

Change in population and labor force 2015 to 2030



responses in labor supply. The main driver of this development is the increasing share of high-educated workers, who supply considerably more hours than medium- and low-educated workers. Both the baseline and constant-migration scenario lead to similar results, although negative developments are mitigated by more intensive migration. Targeted migration policies may hence play a key role for economies that are expected to face major demographic transitions.

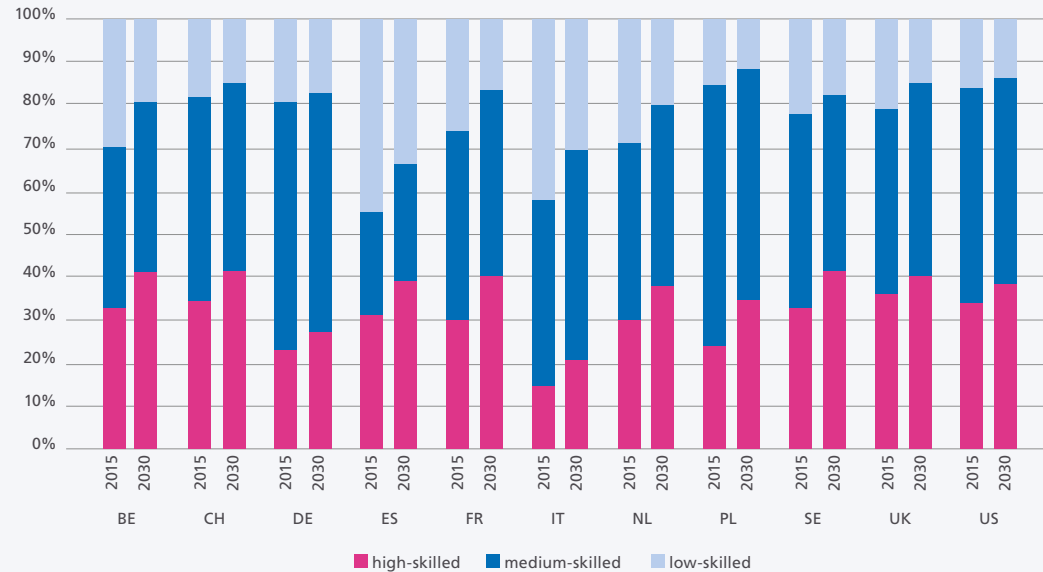
3.3 JOBS TO PEOPLE? – ASSESSING FIRM LOCATION CHOICE BEHAVIOR

The research shows that the reasons firms have for choosing a location are complex. From a vast amount of empirical

research, it emerges that one key determinant of location choice is market potential. A region's GDP or purchasing power, the presence of competitors/suppliers, and the quality of the infrastructure crucially affect firms' assessments of markets and their choice of location. In addition, they seem to like locations where similar firms have settled, creating industrial clusters. Not surprisingly, they also welcome the presence of suitable employees, a factor that has been shown to foster the extent of entrepreneurial activities. For example, the foundation of new, high-tech firms in the United States can be related to the close proximity of scientists and universities, which provide these new firms with valuable scientific knowledge and expertise. ■

Educational level of labor force

In the European Union 35 million new high-skilled workers are needed in the coming years as a result of expansion and aging.



Source: 'People to jobs, jobs to people', Randstad-EZA 2017

Given the complexity and variety of determinants affecting firms' choice of location, it appears unlikely that companies are inclined to relocate their entire production process to different regions in response to moderate changes in the availability of one factor in production. Relocation is generally due to external growth – and is rather infrequent. Increased offshoring rather than relocation may be a more common behavioral response to

skill shortages. Access to qualified personnel already serves as a key determinant of companies' decision to offshore activities. Jobs to people? Reasons for (re)location of firms.

3.4 KEY MESSAGES 'PEOPLE TO JOBS, JOBS TO PEOPLE'

The observed aging of populations, paired with ongoing technological change in favor of high-skilled and/or non-automatable labor in

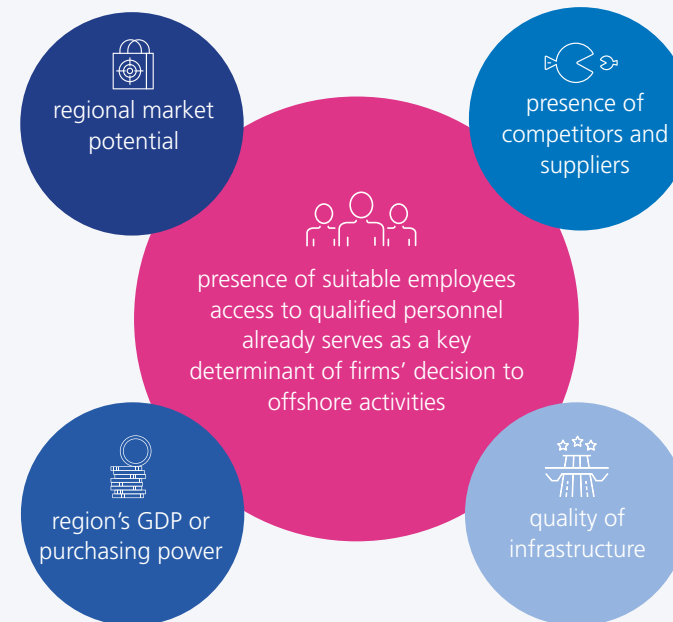
developed countries, has led to continuous discussions about suitable policies for counteracting potential shortages of skills. Although increasing educational attainment or changes in working arrangements may help to alleviate skill shortages, the researchers argue that migration should be seen as one of the key policy instruments to align skill-specific labor supply and demand in developed countries or regions and thus to ensure economic

progress and avoid companies relocating to skill-abundant countries.

■ GROWTH AND EMPLOYMENT

Facilitating labor migration helps to substantially ease potential labor shortages and contributes to growth and employment. Coherent migration policies, especially policies that systematically account for skill-specific demands by the national economy, lead to substantial benefits. ▣

Jobs to people? Reasons for (re)location of firms



Source: 'People to jobs, jobs to people', Randstad-EZA 2017

■ 'GOOD INSTITUTIONS'

National institutions in both destination and origin countries have important effects on the size and composition of the migrant population. Features such as unemployment benefits or employment protection influence different groups in the potential migration pool in different ways. Apart from explicit (skill-oriented) migration policies, national policymakers have strong incentives to create “good” institutions in order to attract or retain skilled and productive migrant workers in an increasingly global market.

■ TRANSNATIONAL NETWORKS

Transnational diaspora networks (linking migrants in the receiving countries with their families and friends “back home”) provide potential migrants with important information about what they can expect to find in terms of prospective working conditions and job opportunities in the “new country”. These networks give employers in these countries access to a reliable pool of migrant workers. In addition, it can be advantageous for the sending countries to understand these networks and engage with them (e.g., to encourage return migration and the circulation of talent), as well as with

destination societies (e.g., to reduce illegal migration). From the destination countries’ point of view, an influx of highly educated newcomers is key to addressing problems related to population aging, labor shortages, and skill mismatches.

■ OFFSHORING

The presence of suitable employees has been shown to guide firms’ location choices, and to foster the extent of entrepreneurial activities. Increased offshoring rather than relocation serves as firms’ more common behavioral response to skill shortages. Access to qualified personnel already serves as a key determinant of firms’ decision to offshore activities. Given the expected demographic developments in Western societies paired with the technological progress in many non-Western countries (in particular Asia), this trend can be expected to increase over the upcoming years. ■

IV. Conclusions

It is clear that the labor market has changed radically over the past decade or more. And more (and more fundamental) change lies ahead. The mobility and diversity of the future workforce will benefit business greatly, as it strives to remain agile, fast and responsive. Migration has already shown itself to be an effective way of combating mismatches of skills and location – more so than re-skilling or promoting a higher birthrate. However, for a new migration-based economy to take hold, the present, outdated infrastructure for managing migration will need to be totally re-designed. In this process, policymakers – before developing new or revised labor migration structures – will need to join with employers (and, indeed, workers themselves) to consider how the needs of modern business can be met in the new context.

A BALANCED SKILL-RELATED LABOR MIGRATION SYSTEM

What should a balanced migration system be like? It should include a robust and flexible framework, one that is accessible and transparent, with clearly defined migration categories and objective eligibility criteria. It should be efficient and coherent, with timely and predictable processes. A range of categories is needed to spur innovation, fill skills gaps and

promote development. These categories should reflect and adapt to the evolving workplace.

GOVERNMENTS NEED TO CONSULT WITH BUSINESS

Employers are in the best position to determine the skills and business models they need to effectively achieve their objectives, and governments therefore need to actively consult with them. They will need to administer immigration agencies, and the adjudicators of these agencies must be charged with the consistent application of the law and policy. This includes setting up and monitoring ethical standards to give those policies credibility. On a practical level, the use of ‘Trusted Employer’ programs would do much to both promote consistency and conserve resources.

BUSINESS ADVOCACY ON RESPONSIBLE LABOR MIGRATION

Businesses should play a prominent role in advocating fair and open migration policies, identifying policy challenges and emphasizing the benefits of well-managed skill-related migration. Businesses should counter common misconceptions about migration in society, by promoting the successes of migrants and highlighting their positive economic, social and cultural contributions. Businesses should also partner with policymakers and responsible recruitment agencies to help develop and promote fair recruitment initiatives. ■

Notes

Note 1: REFUGEES

More than 90 percent of the world's 244 million cross-border migrants moved voluntarily, usually for economic reasons. The remaining 10 percent are refugees and asylum seekers who have fled to another country to escape conflict and persecution. Roughly half of these 24 million refugees and asylum seekers are in the Middle East and North Africa, reflecting the dominant pattern of flight to a neighboring country. But the recent surge of arrivals in Europe has focused the developed world's attention on this issue.

WHOLE-OF-SOCIETY APPROACH

At Randstad, we believe that a comprehensive response to large movements of refugees should include a whole-of-society approach spanning all actors, including the private sector. The private sector is indispensable if we are to achieve a positive and sustainable result in providing employment opportunities to refugees and building human capital.

THE PROBLEM OF SKILLS AND AUTHORIZATION

Private organizations around the world are already engaged in a wide range of efforts to support refugees' entry into the local workforce. Direct employment of refugees is one of the clearest ways private organizations can help. However, employers face significant challenges in recruiting and hiring from this population. Although there are highly skilled among some refugee populations, it can be difficult to verify skills. Lack of skills and qualifications, as well as language barriers, are some of the other practical challenges. But the most difficult hurdle is the challenge of obtaining and maintaining work authorization for refugees. In addition to private-sector initiatives, governments should make significant efforts to lift the legal barriers to refugee access to work and to facilitate their ability to travel for employment opportunities, through legal, regulatory and systems improvements.

Note 2: FAIR RECRUITMENT AND DECENT WORK

Recruiters and other employment service providers play a significant role in matching labor supply and skills with international employment opportunities. Because recruiters are often the first entry point to international employment for many foreign nationals, it is imperative to promote the responsible and ethical agencies that ensure high-quality recruitment standards and provide decent work to protect migrant workers throughout the recruitment process.

Randstad strongly supports the promotion of fair and ethical recruitment practices to promote human rights, reduce abuse and avoid the negative consequences of migration at all levels. In this connection, it is vital that we support initiatives such as the ILO's Fair Recruitment Initiative and United Nations Sustainable Development Goal on decent work and economic growth.

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