



The Future of Work and Skills



ManpowerGroup Overview

70 Years of Global Workforce Solutions Expertise



Revenues of
\$21 billion



87% of revenues
generated outside of U.S.



**80 Countries
& Territories**



**29,000
Employees**



**2,700
Offices**

World-Leading IT Professional resourcing firm
A World-Leading Outplacement Firm
LARGEST GLOBAL VENDOR-NEUTRAL MSP PROVIDER

- Providing meaningful work for **600,000+** people every day
- Connecting **millions** of job seekers with work every year, globally
- Finding talent for clients from small/medium to Fortune 100 companies



Most Trusted Brand in the Industry

2019
WORLD'S MOST
**ETHICAL
COMPANIES**[™]
WWW.ETHISPHERE.COM

FORTUNE
WORLD'S MOST
**ADMIRABLE
COMPANIES**[™] 2018



Strong and Connected Brands



ManpowerGroup[®]



ManpowerGroup[®]
Solutions



Experis[®]
ManpowerGroup



Manpower[®]



Right
Management[®]
ManpowerGroup

ManpowerGroup Italia Overview

Over than 20 years of experience



Permanent Placement
since **1994**



Staffing
since **1997**



20 Regions



1.800
Employees



230
Offices

- Providing meaningful work for **110.000+** people in a year.
- Contracts signed every year: **350.000**
- Finding talent for **15.000** clients from small/medium to Fortune



Most Trusted Brand in the Industry

2019 **WORLD'S MOST ETHICAL COMPANIES**[™]
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FORTUNE
WORLD'S MOST
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Strong and Connected Brands



ManpowerGroup[®]


ManpowerGroup[®]
Solutions


Experis[®]
ManpowerGroup


Manpower[®]
Professional


Manpower[®]


FuturSkill[®]
ManpowerGroup


Right
Management[®]
ManpowerGroup

The Future of Work: The Human Age 2.0

Technological Revolution

The impact of Digitization on People and Skills

Rise of Client Sophistication

The Power is Shifting

Greater Individual Choice

From Job for Life to Career for Me

Shifting Demographics

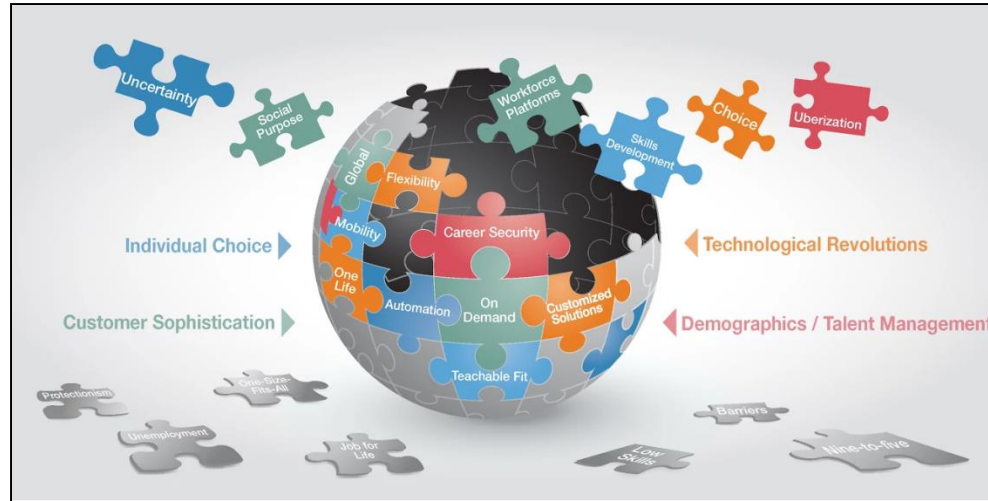
Bridging the Divide



The New Normal

Changes to processes, structure, & business models

Leading through increased complexity, speed & ambiguity



Continuous customer experiences vs. interactions = redefining life cycles

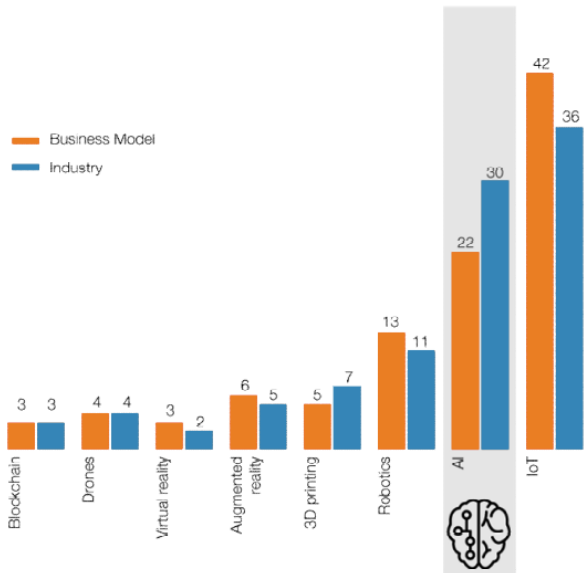
Ongoing transformation & change

Digital Disruption is driving a reset of your business...

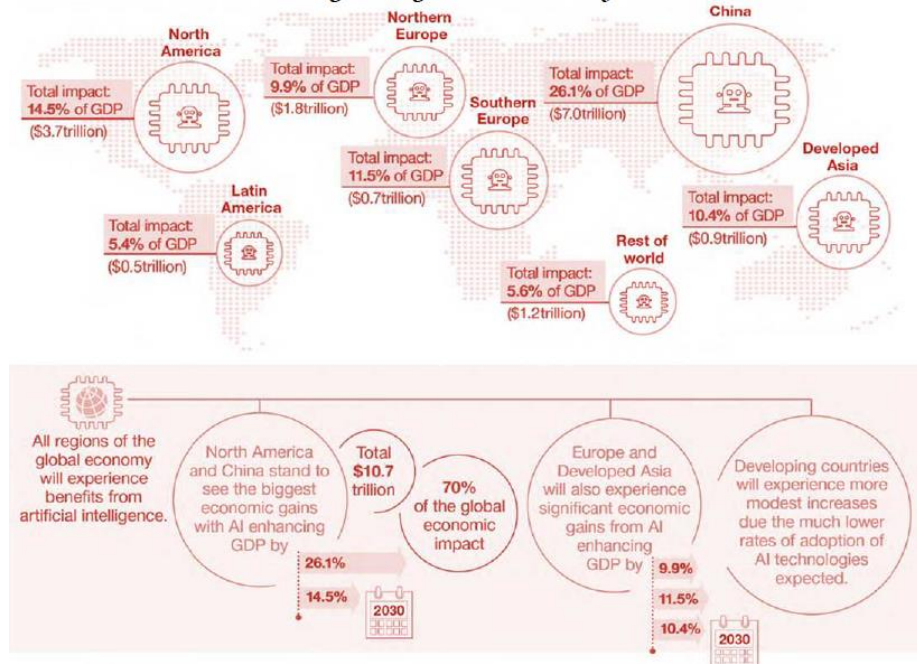
Global vs. Organisational Growth

AI could contribute up to \$15,7 trillion to the global economy by 2030

In next five years, which technology will be more disruptive to your company?

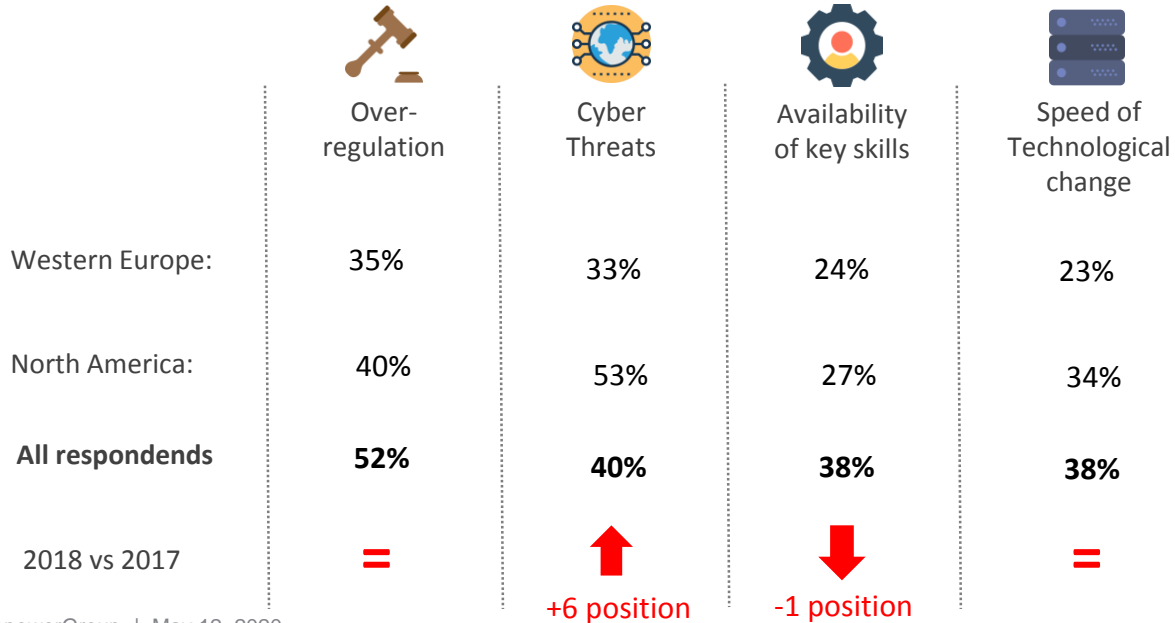


Which regions gain the most from AI?



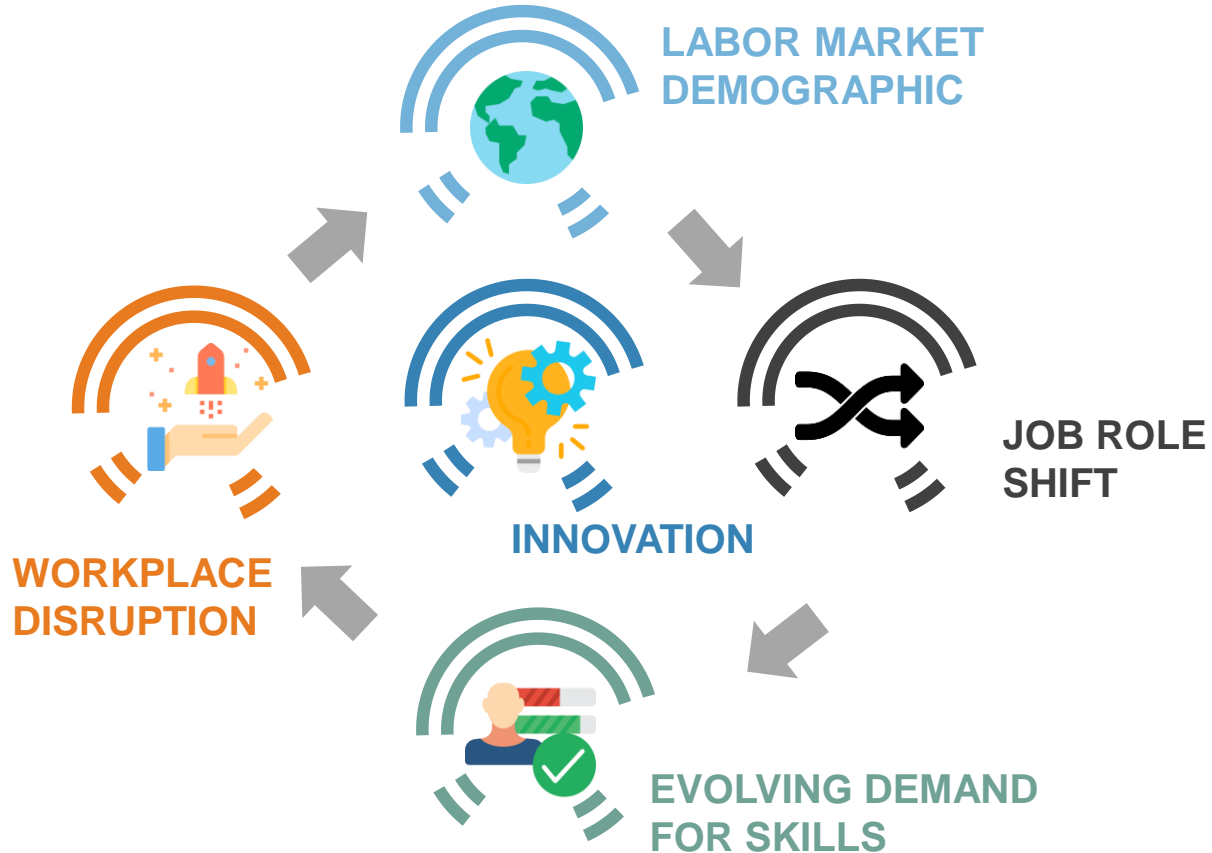
Threats

Technology related risks gain relevance



Companies are more troubled by larger **societal and geopolitical shifts** than by the dynamics in their own market. The one exception is **technology-related developments**, where we see anxiety about the impending promise and perils of artificial intelligence (AI) taking hold. That boon to the overall economy, however, will come at great cost to those who cannot rise to its challenges in time.

Global Interconnections Shaping The Future of Work



- **Migration**
- **Ageing**
- **Youth Perspective**



Job Role Shift and Skills Revolution

- AI and Robotics
- **Social Innovation**
- Fourth Industrial Revolution



- Lifelong learning
- Relevant Specialized Education
- 21° Century Curricula



- **Mobility**
- **Smart Working**
- **Digital Economy**



Today's Global Economy Challenges

- **Two years ago**, the global economy was in an **upswing**: measured by GDP, nearly 75 percent of the world was accelerating
- **Today growth is decelerating**: in 2019, we expect slower growth in nearly 90 percent of the world
- Despite this overall deceleration, **close to 40 emerging market and developing economies are forecast to have real GDP growth rates above 5 percent**
- In the **United States and Germany, unemployment is at historic lows**. Yet across advanced economies, including in the **U.S., Japan**, and especially the **euro area**, there is a **softening of economic activity**. In **China** also growth is gradually coming down from the rapid pace it saw for many years.



Today's European Economy Challenges

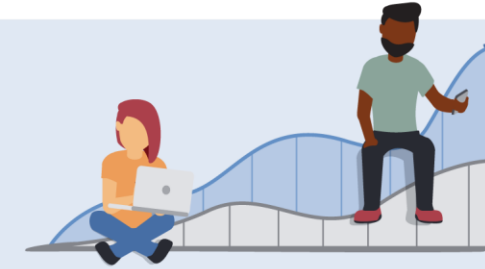
- In Europe, **growth shifted into a lower gear** in the second quarter of 2019
- Headwinds from **slowing global growth, trade war uncertainties** and **issues in the manufacturing sector** are the main reasons
- Growth is seen at **1.1% in 2019** and **1.1% again in 2020**, which is down 0.1 percentage points from last month's forecast
- **UK post Brexit: what's going to happen?**



Sept 25, 2019 www.focus-economics.com/

Today's Workforce Challenges

Determining the right workforce strategy



Upskilling workforces



Finding the right talent

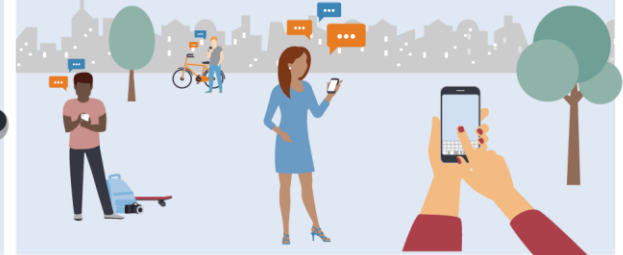
Competing in the digital age



Attracting and retaining talent



Preventing business disruptions



The Skills Revolution is in Full Force

Automation is Creating Jobs



More employers than ever – **87%** – plan to maintain or **increase** headcount as a result of **automation**



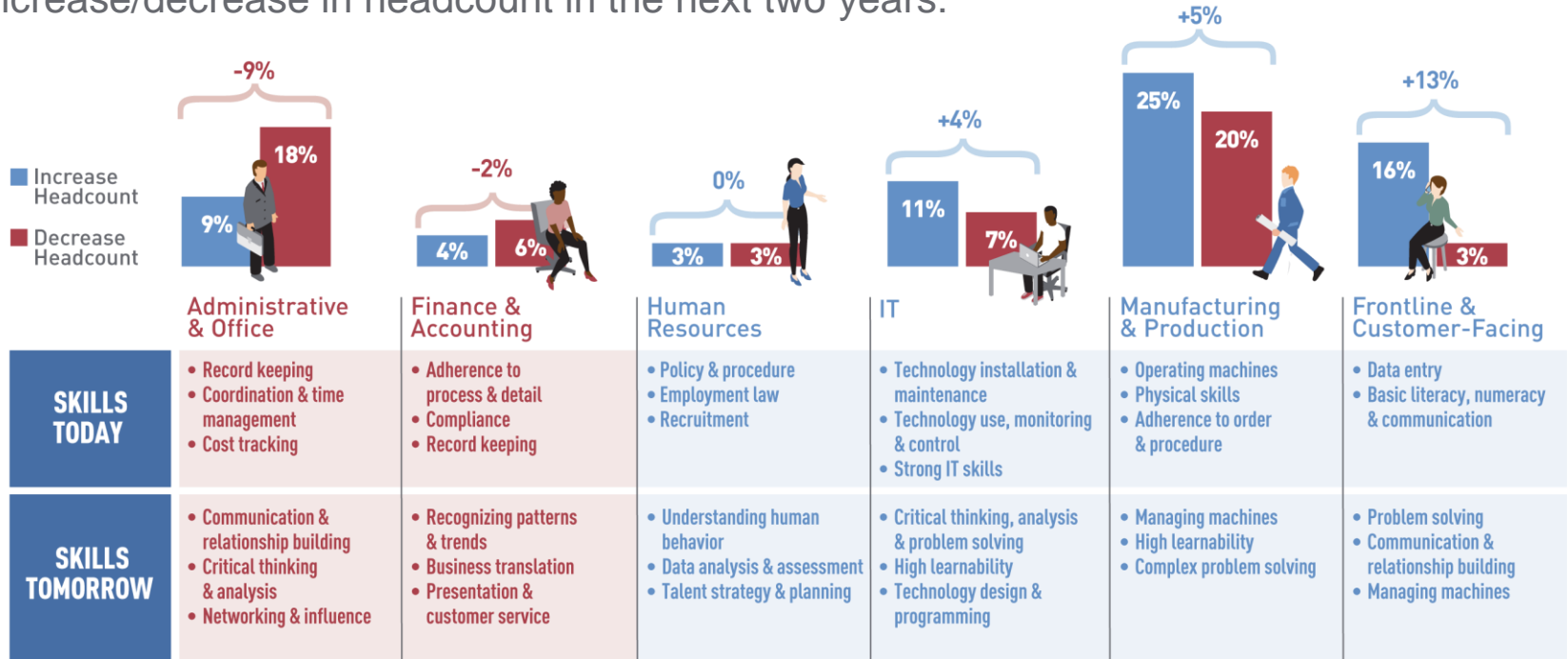
Organizations That Are Automating Most Are Creating The Most Jobs

Of the **41%** of companies that will automate tasks over the next 2 years, **24%** will create more jobs



Human Skills Trending

Demand for tech and digital skills is growing across all functions, yet employers place increasing value on human skills. Functions likely to see the largest increase/decrease in headcount in the next two years:



Human Skills: Hard to Find, Even Harder to Teach

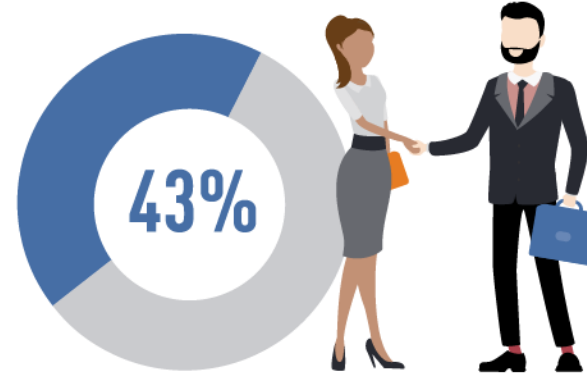
Technical Skills



38% of organizations say it is difficult to train in-demand technical skills

VS

Soft Skills



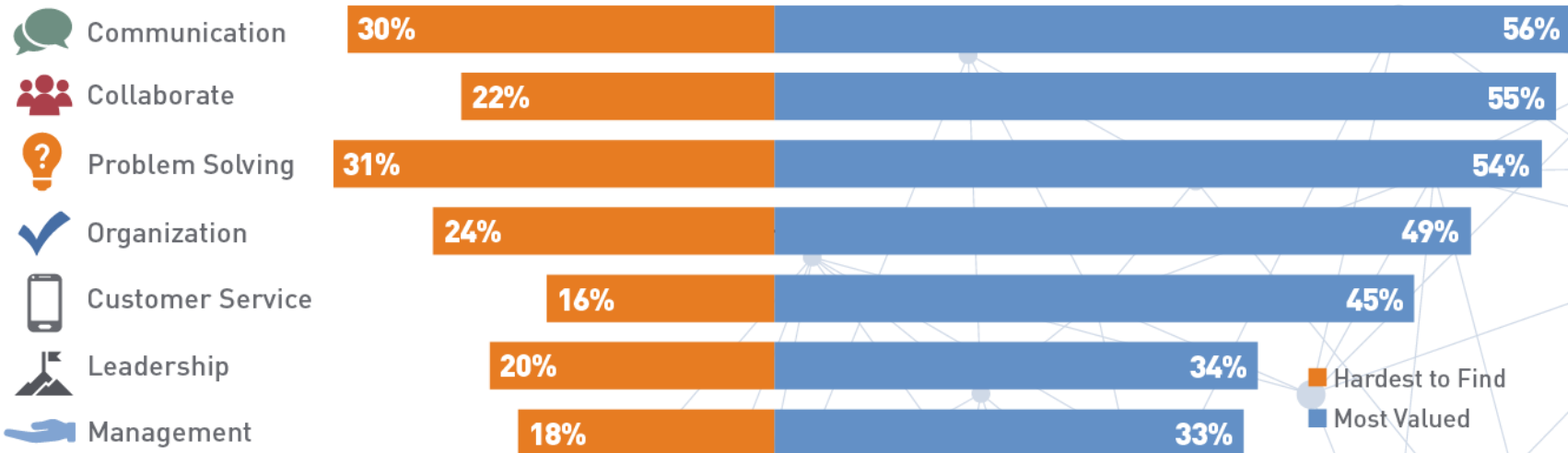
43% of organizations say it is hard to teach the soft skills



65% of companies planning to increase headcount in IT roles say **communication** is the most valued soft skill

Human Strengths Stand Out in the Digital Age

Most Valued Soft Skills Are Hard to Find



How do we stay employable in this scenario? Solutions to the Skills Revolution

1

HIRE FOR LEARNABILITY



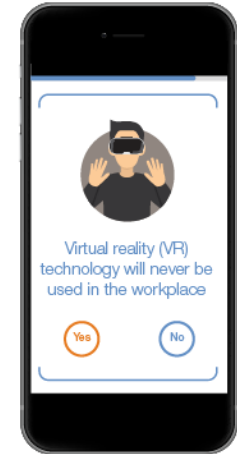
2

IDENTIFY SKILLS ADJACENCIES



3

DEVELOP DIGITAL LEADERS

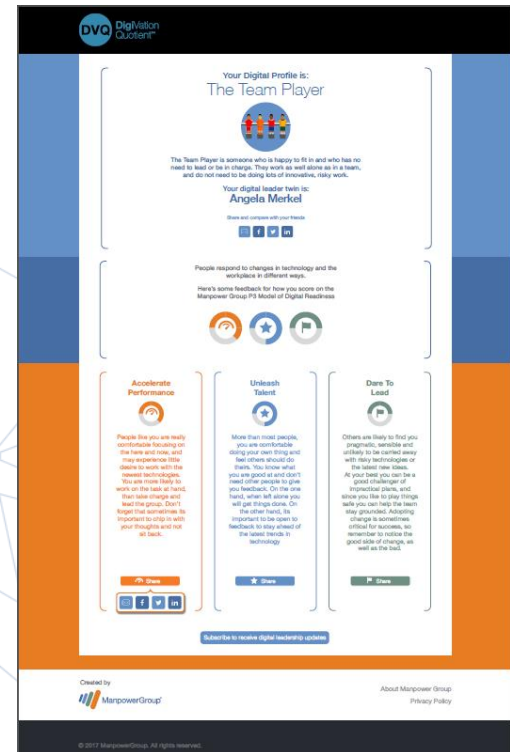


How to assess Learnability skills?

DigiQuotient

- The DigiQuotient is a short (34-question) B2C mobile assessment which provides an indication of a leader's readiness to lead through a digital workforce transformation. Upon completing the assessment, the user receives:
- An indication of their Digital Profile (1 of 8 personas)
- A “Digital Twin” based on a survey of global business leaders that embodies their persona
- Guidance related to three major categories of coachable capabilities: dare to lead, accelerate performance and unleash talent
- The DigiQuotient provides users guidance on how to leverage their strengths, and what possible derailing behaviors to recognize and mitigate.

digiquotient.io



manpowergroup.com/futureofworkandskills

