

DECODING GLOBAL TALENT

INSIGHTS ON INTERNATIONAL MOBILITY OF THE GLOBAL LABOUR MARKET

14TH MAY 2015



DECODING GLOBAL TALENT

HOW TO BRIDGE THE SKILLS GAP OF THE GLOBAL LABOUR MARKET

14TH MAY 2015



INTRODUCTION

THE NETWORK STORY

BY MIKE BOOKER, MANAGING DIRECTOR, THE NETWORK

INTRODUCING OUR ORGANISATION



YEARS

> April 23rd to 24th 2015

skywalker.gr

THE NETWORK 
The world's local recruitment experts

A BRIEF HISTORY OF TIME

Network

6 members	15 members	34 members	48 members	56 members
18 countries	37 countries	70 countries	119 countries	132 countries

Global Talent Survey

Wave 1 Wave 2 Wave 3 Wave 4

Technology



twitter Rebranded from Twtrr



iPad



amazonkindle outsell paper books

Google! IPO

iPhone

Global internet penetration
40% (from 10% in 2002)



2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015

THE NETWORK IN NUMBERS

132 countries

203,000,000 Unique Visitors per month

317,000,000 CV's

1.2 Billion visits per month

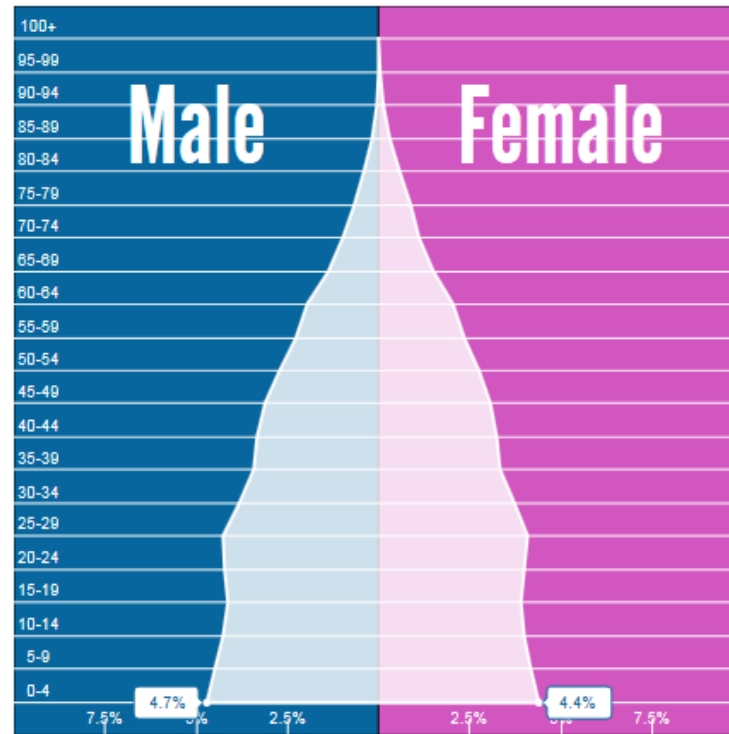


DECODING GLOBAL TALENT

THE SKILLS GAP

LABOUR MARKET LANDSCAPE

WORLD
2015 Population: **7.324.782.000**



LABOUR MARKET LANDSCAPE

**Greece
2015**

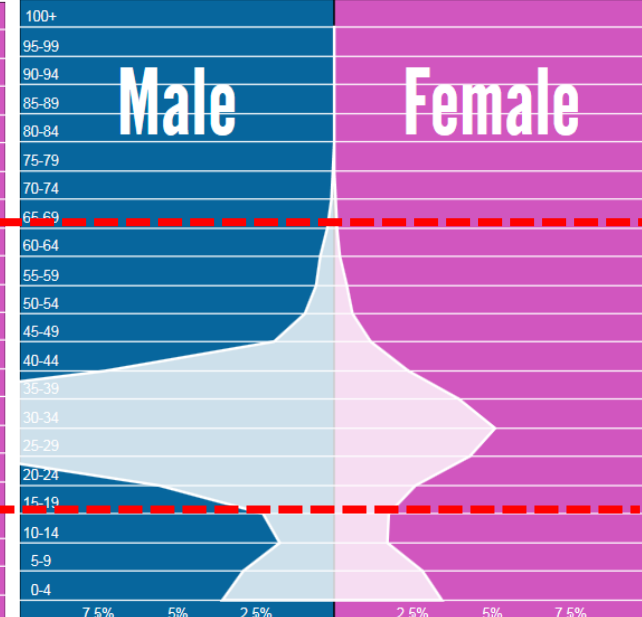
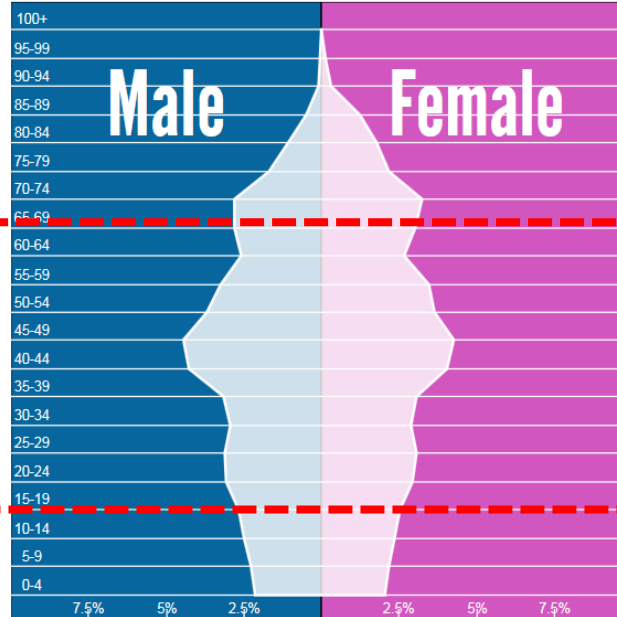
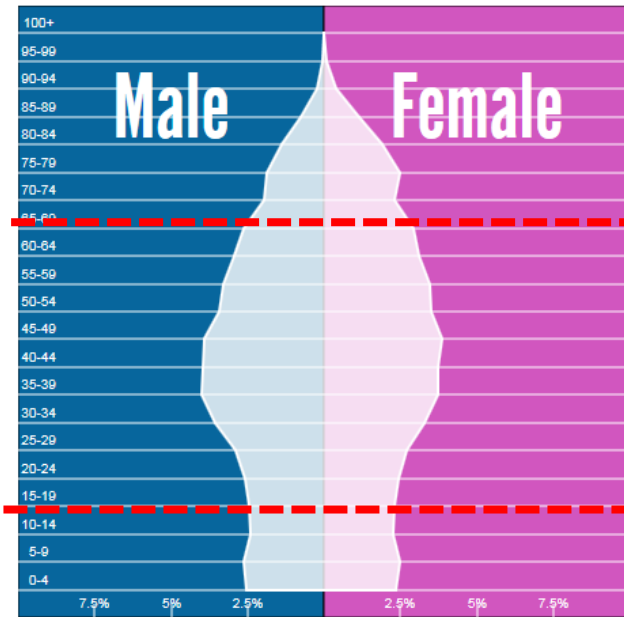
Population: **11.125.000**

**Germany
2010**

Population: **83.017.000**

**United Arab Emirates
2015**

Population: **9.577.000**



LABOUR MARKET LANDSCAPE

Japan
2015

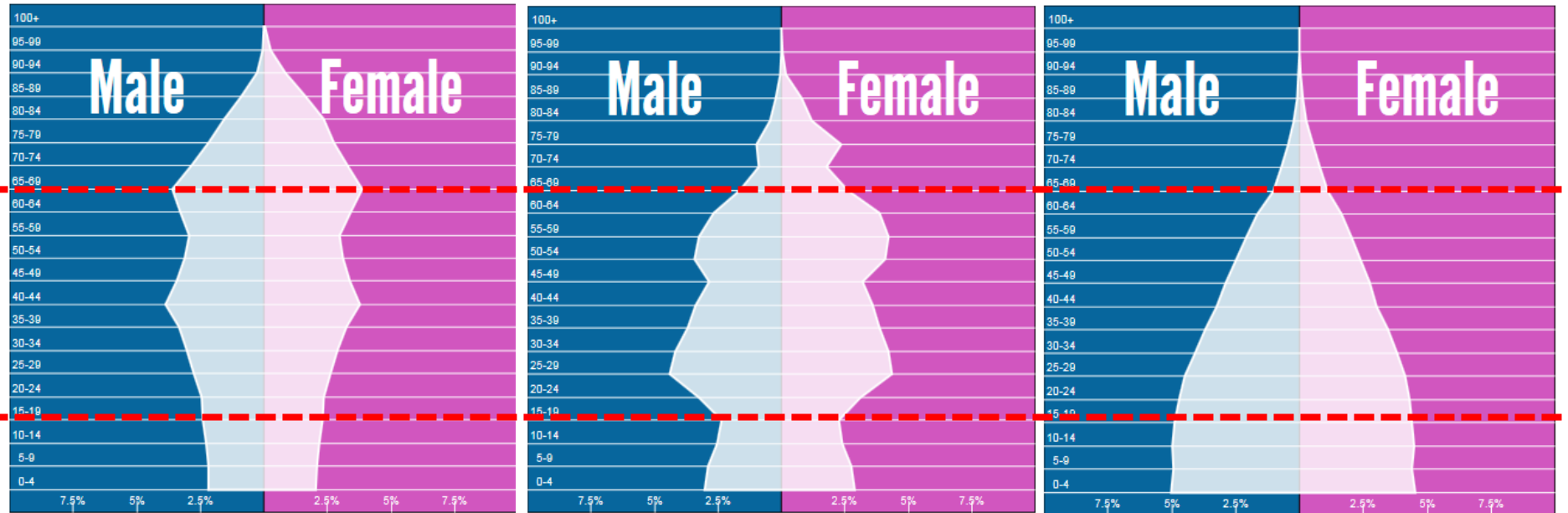
Population: 126.818.000

Russian Federation
2015

Population: 142.098.000

India
2015

Population: 1.282.390.000



MCKINSEY'S "WAR FOR TALENT"

McKinsey consultant Steven Hankin created the phrase "War for talent" in 1997...

The study was developed to explain the intensity of competition in attracting and retaining talent

Harvard Press's subsequent publication emphasized the importance of talent and its relation to the success of an organisation

There is hope though and Germany is a good example of a country starting to tackle these barriers. **Germany recently changed their immigration rules to make it easier for skilled workers from outside the EU to work in the country**, with the specific aim of easing chronic shortages in key industries. Our research shows that this has helped reduce their talent mismatch.

AMAZON'S UNIQUE RETENTION PROGRAMME



Called Pay To Quit, the programme is “pretty simple,” Bezos says. “Once a year, we offer to pay our associates to quit. The first year the offer is made, it’s for \$2,000. Then it goes up one thousand dollars a year until it reaches \$5,000.

WILL CODING BECOME THE NEW SECOND LANGUAGE?

Coding at school: a parent's guide to England's new computing curriculum

From the start of the new term, children as young as five will be learning programming skills in the classroom

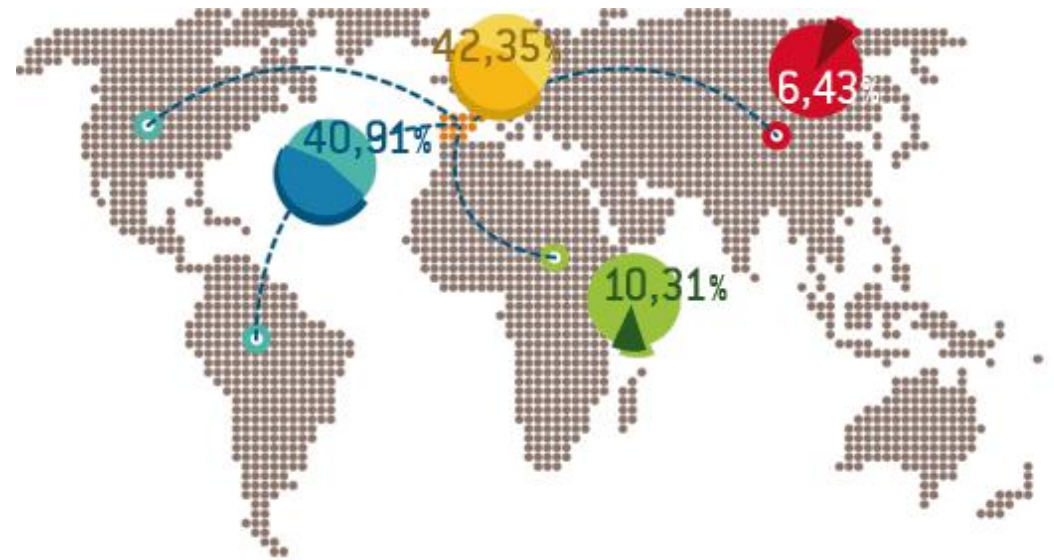


📷 Coding is on the curriculum for primary and secondary school pupils in the UK. Photograph: Alamy

DECODING GLOBAL TALENT

HOW TO SOLVE THE GLOBAL WORKFORCE CRISIS OF 2030

GLOBAL TALENT SURVEY WAVE 4



32 Questions

44 Languages

189 Countries

203,756 Responses

GROUND BREAKING GLOBAL STUDY

BCG

THE BOSTON CONSULTING GROUP

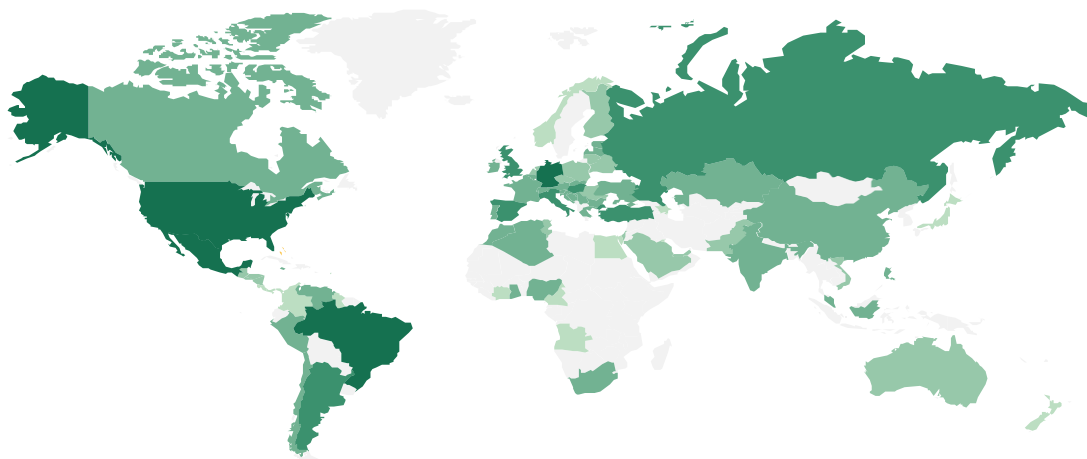


WITH THE LARGEST SURVEY SAMPLE OF ITS KIND

Sample size: 203,756

Americas

Mexico	14,758
United States	12,050
Brazil	11,282
Argentina	7,075
Venezuela	3,675
Canada	3,595
Peru	3,419
Trinidad and Tobago	2,806
Chile	1,792
Jamaica	1,755
Nicaragua	384
El Salvador	272
Barbados	263
Guatemala	225
Honduras	125



Middle East and Africa

Algeria	2,505
Nigeria	2,433
South Africa	2,047
Morocco	1,886
Ghana	1,073
United Arab Emirates	327
Israel	289
Tunisia	275
Saudi Arabia	224
Qatar	167

Asia and Pacific

India	4,947
Kazakhstan	4,892
Indonesia	4,610
Malaysia	4,127
China	3,618
Philippines	2,587
Taiwan	1,687
Vietnam	607
Singapore	394
Australia	365
Pakistan	150

Europe

Germany	16,220
Turkey	8,627
United Kingdom	6,363
Italy	5,546
Spain	5,293
Hungary	5,144
Russia	5,085
Switzerland	4,414
Bulgaria	3,769
Ukraine	3,641
Sweden	3,474
France	3,214
Slovenia	2,940
Estonia	2,698
Austria	2,105
Ireland	1,984
Latvia	1,870
Greece	1,658
Belgium	1,282
Greece	1,235
Bosnia and Herzegovina	1,216
Portugal	1,168
Serbia	1,159
Slovakia	1,120
Romania	729
Finland	681
Luxembourg	441
Belarus	427
Czech Republic	400
Malta	287
Croatia	284
Lithuania	209
Poland	183
Netherlands	162

Lightest green	Fewer than 50
Light green	50–100
Medium light green	101–1,000
Medium green	1,001–5,000
Dark green	5,001–10,000
Darkest green	10,001 or more

Source: 2014 BCG/The Network proprietary web survey and analysis.

Note: Responses to question "Which country do you live in?". Listed are the 70 countries with > 100 responses. 3,418 respondents did not specify a country.

TOP LEVEL FINDINGS OF THE RESEARCH



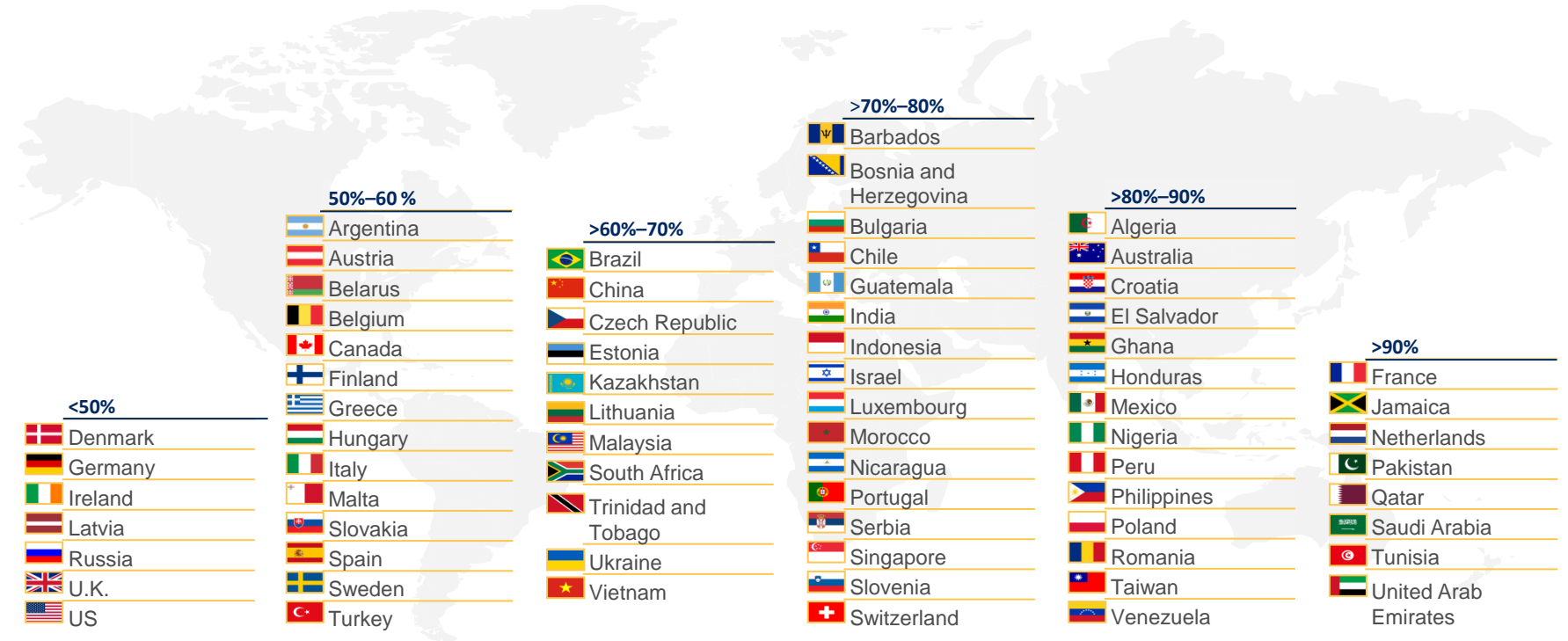
WHAT MOTIVATES THE WORLD'S WORKFORCE?

- 1 Workers' mobility** > 64% of survey participants worldwide say they would move abroad for work
- 2 Most appealing countries** > USA most popular destination, UK second; London the most attractive city
- 3 Reasons to work abroad** > Broadening one's personal experience as top reason to go to foreign country for a job
- 4 Job preferences** > Growing importance of "softer" factors like appreciation and relationships at the workplace
- 5 Implications** > Decoding implications for economies, companies and individuals

INCREASING WILLINGNESS TO WORK ABROAD

Percentage of participants from each country who are already living abroad or are willing to move to a foreign country for work

Global average = 63.8%

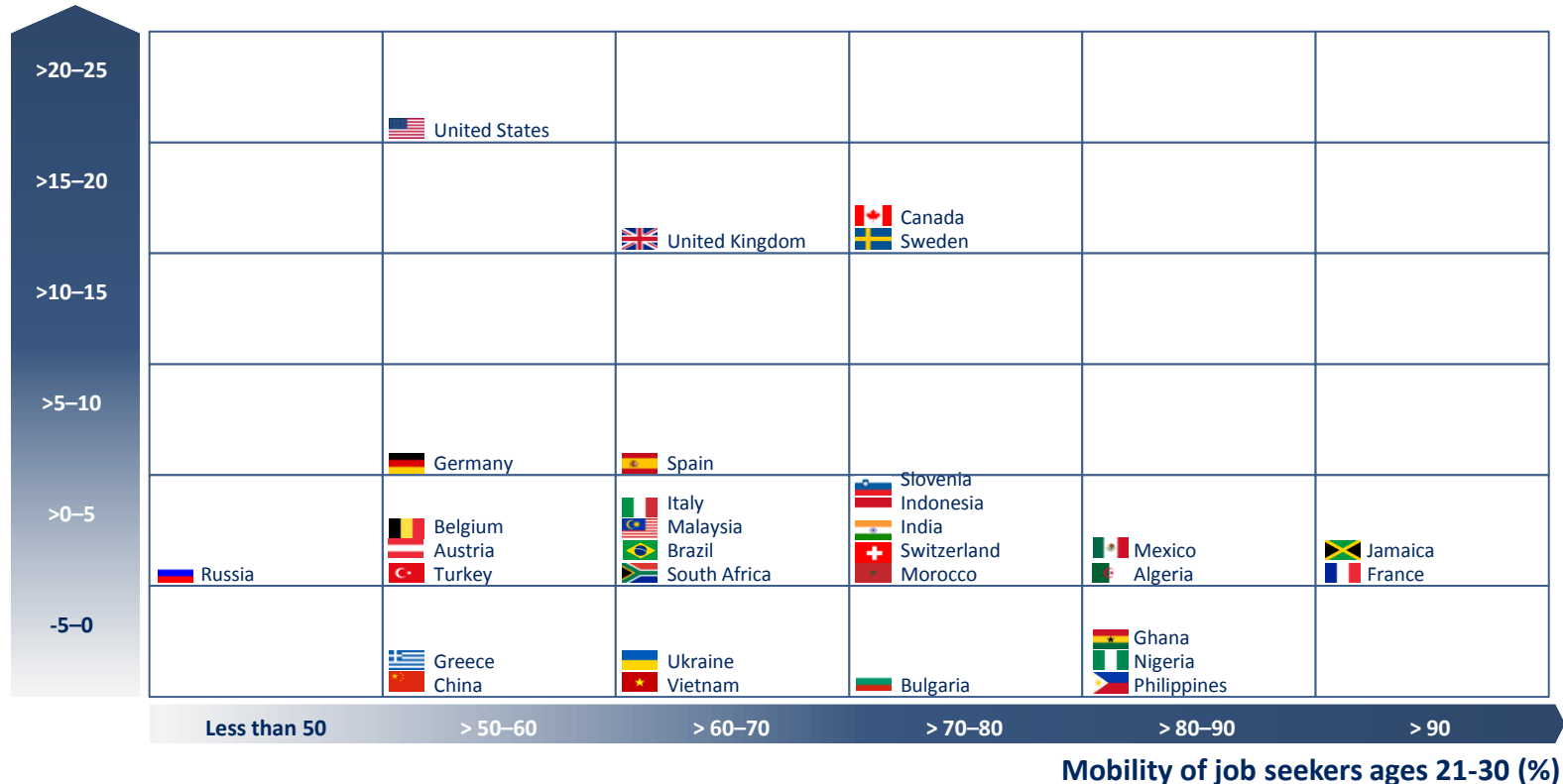


Source: 2014 BCG/The Network proprietary web survey and analysis.

Note: Total sample size was 203,756; listed are the countries from which there were more than 100 responses.

WHERE YOUNG WORKERS ARE MORE/LESS ADVENTUROUS (COMPARED TO THEIR COUNTRY AVERAGE)

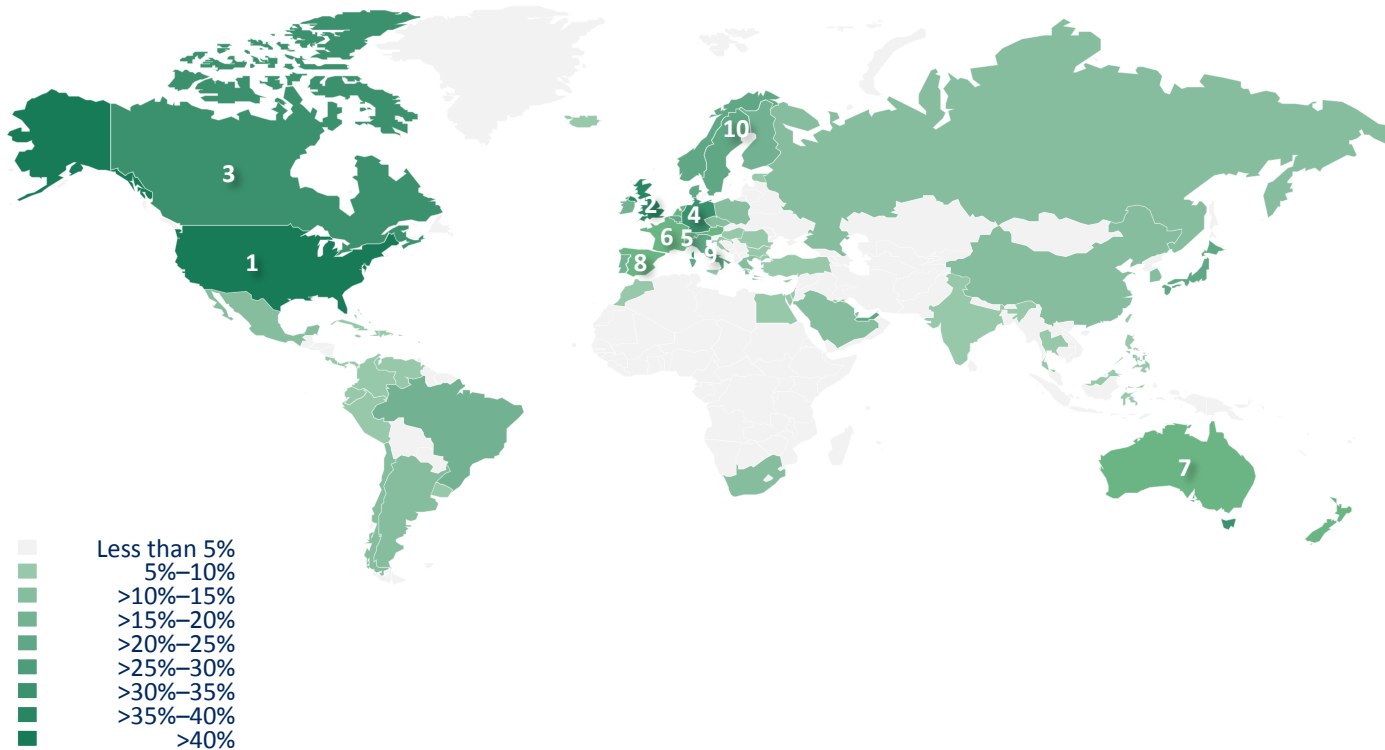
21-30 year olds' mobility above or below country average (in percentage points)



Source: 2014 BCG/The Network proprietary web survey and analysis.

Note: Only includes countries from which more than 250 people ages 21 to 30 responded.

TOP DESTINATION COUNTRIES



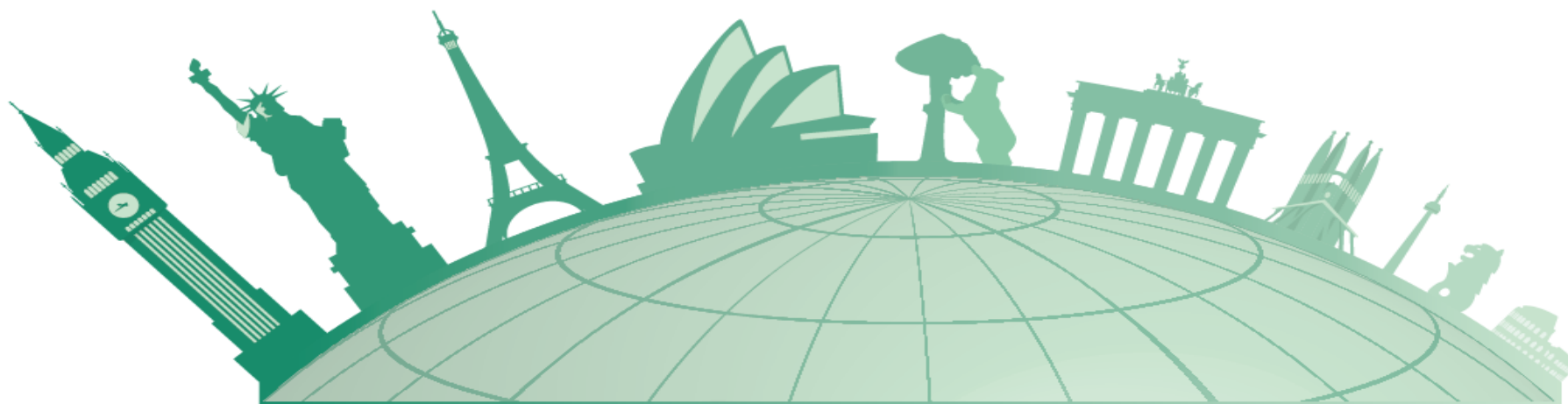
Country's rank as a potential work destination
(% of respondents willing to move there)

- 1 US (42%)
- 2 U.K. (37%)
- 3 Canada (35%)
- 4 Germany (33%)
- 5 Switzerland (29%)
- 6 France (29%)
- 7 Australia (28%)
- 8 Spain (26%)
- 9 Italy (25%)
- 10 Sweden (23%)

Source: 2014 BCG/The Network proprietary web survey and analysis.

Note: Total sample size was 203,756.

MOST DESIRABLE CITIES FOR RELOCATION

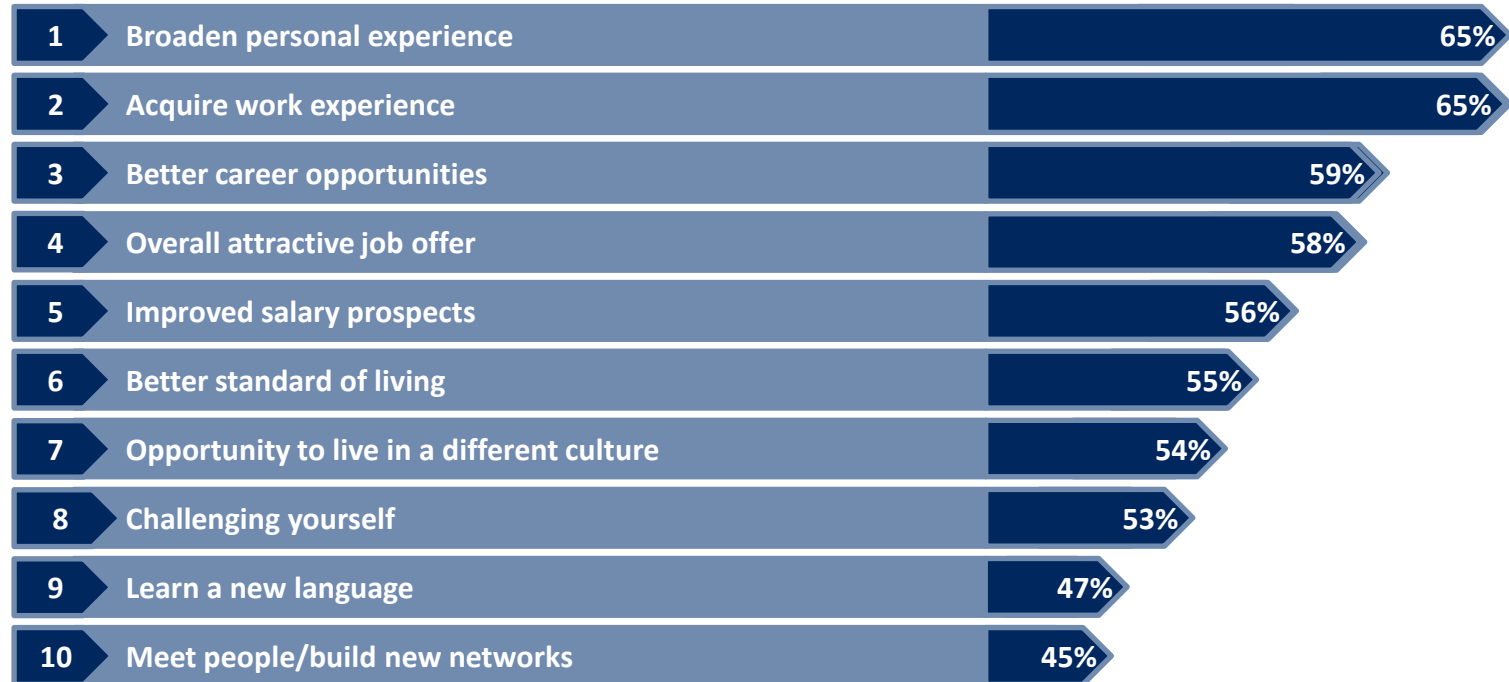


1	London	16.0%	2	New York	12.2%	3	Paris	8.9%	4	Sydney	5.2%	5	Madrid	5.0%	6	Berlin	4.6%	7	Barcelona	4.4%	8	Toronto	4.2%	9	Singapore	3.9%	10	Rome	3.5%
11	Dubai	3.4%	16	Amsterdam	2.5%	21	Montréal	2.1%	26	Santiago de Chile	1.7%																		
12	Los Angeles	3.2%	17	Vienna	2.5%	22	Oslo	2.1%	27	Melbourne	1.7%																		
13	Tokyo	2.8%	18	San Francisco	2.4%	23	Vancouver	2.1%	28	Copenhagen	1.6%																		
14	Munich	2.8%	19	Stockholm	2.4%	24	Dublin	1.9%	29	Lisbon	1.5%																		
15	Miami	2.6%	20	Zurich	2.2%	25	Brussels	1.7%	30	Geneva	1.5%																		

Source: 2014 BCG/The Network proprietary web survey and analysis.

Note: The question asked was "Which cities would you consider working in abroad? Please indicate up to five answers."

MAIN CONSIDERATIONS FOR WORKING ABROAD



Source: 2014 BCG/The Network proprietary web survey and analysis.

Note: Total sample size was 203,756; multiple answers were allowed.

HAPPINESS @ WORK

MOST AND LEAST IMPORTANT FACTORS



Source: 2014 BCG/The Network proprietary web survey and analysis.

Note: Based on responses from all survey participants; total sample size was 203,756.

DECODING TALENT FOR GREECE

THE GLOBAL WORKFORCE CRISIS OF 2030

WHO MOST WISHES TO RELOCATE TO GREECE?

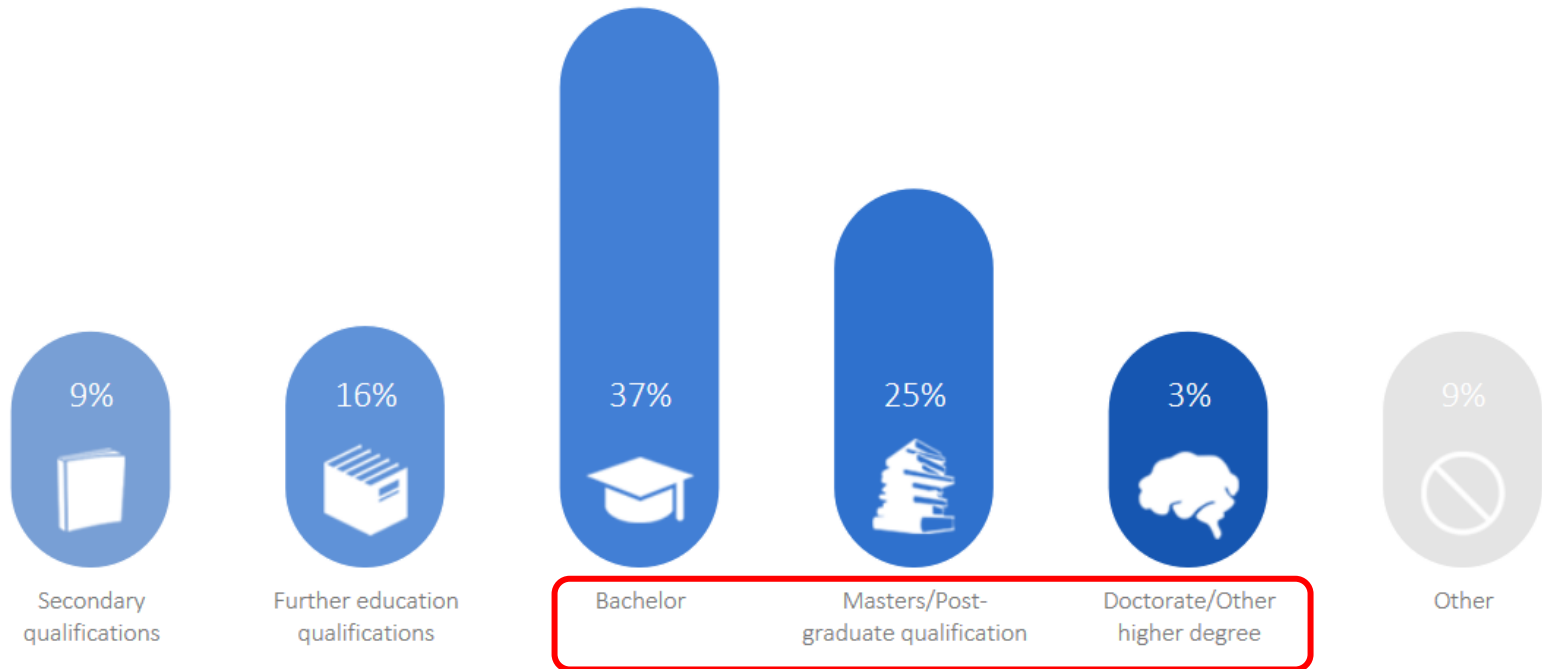
Countries in which the largest number of people would move to Greece for work

1	Serbia	22%
2	Tunisia	18%
3	Finland	17%
4	Pakistan	17%
5	France	16%
6	Israel	16%
7	Netherlands	15%
8	Mexico	15%
9	Philippines	14%
10	Ukraine	13%



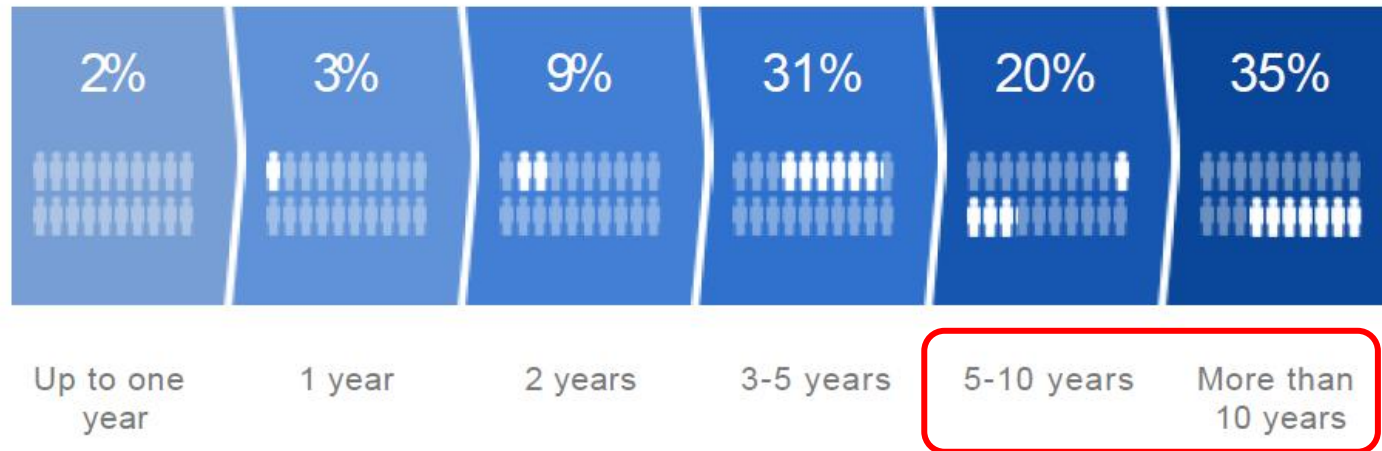
INWARD MIGRATION BY EDUCATION LEVEL

Level of education completed (excluding students)



INWARD MIGRATION BY DURATION OF STAY

Desired length of stay



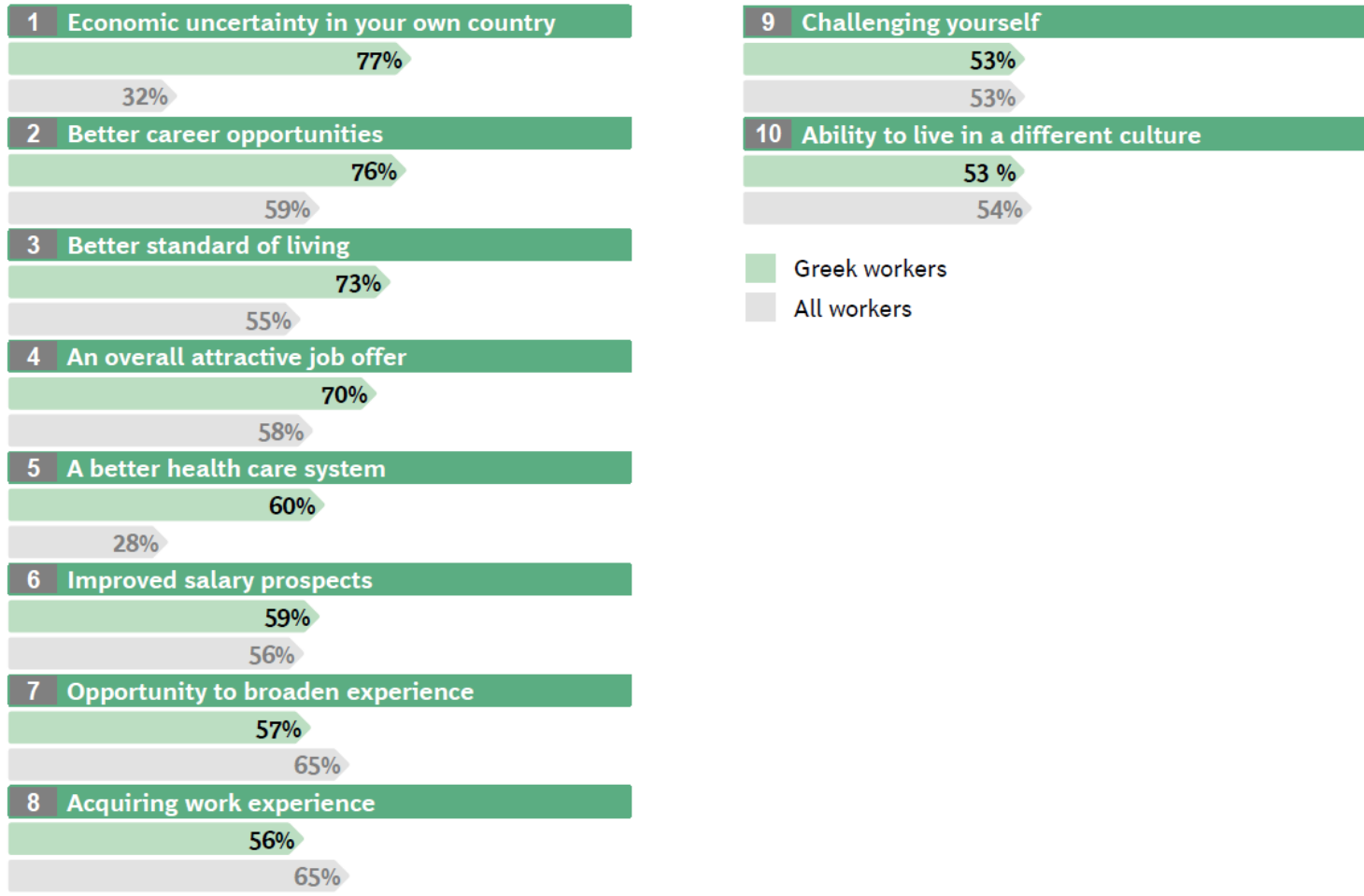
WHERE WOULD MOST GREEK PEOPLE RELOCATE TO?



Countries to which the largest number of Greeks would move for work

1	United Kingdom	18%
2	Switzerland	13%
3	United States	12%
4	Germany	12%
5	France	10%
6	Sweden	10%
7	Italy	10%
8	Canada	9%
9	Cyprus	9%
10	Mexico	9%

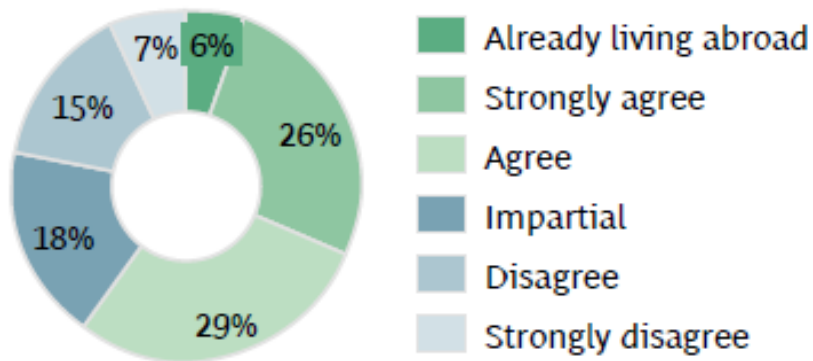
REASONS GREEK PEOPLE WOULD MIGRATE ABROAD



WHICH FACTORS MATTER MOST TO GREEK PEOPLE?



Willingness to work abroad



	Rank in Greece	Rank worldwide
Appreciation for your work	1	1
Financial stability	2	5
Interesting job content	3	9
Learning career development possibilities	4	6
Good relationship with your colleagues	5	2
Good relationship with your superior	6	4
Good work/life balance	7	3
Creative and innovative work environment	8	13
Job security	9	7
Attractive fixed salary	10	8

- Compensation package
- Work environment
- Job content and opportunities
- Company reputation and image

DECODING GLOBAL TALENT

SURVEY OUTPUTS

RESOURCES AVAILABLE TO YOU

BCG
THE BOSTON CONSULTING GROUP

THE NETWORK
The world's local recruitment experts

DECODING GLOBAL TALENT

200,000 SURVEY RESPONSES ON GLOBAL MOBILITY AND EMPLOYMENT PREFERENCES

THE NETWORK
The world's local recruitment experts

Global Talent Survey

BCG
THE BOSTON CONSULTING GROUP

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What is the Global Talent Survey?

The Global Talent Survey addresses a need for businesses across the world to better understand how - and where - to source talented professionals.

[GET STARTED](#)

Latest Updates

- Global Talent Survey 2014 Report**
Vix ne insolens tractatos, duo no quod soluta euripidis, scripta tibi que his no. Nusquam ancillae qui ad.
[Download report \(350kb\)](#)
- Sample Country Profile**
Find here information based on a specific country and the comparison between different variables.
[Download report \(350kb\)](#)
- Quick Reports**
Vix ne insolens tractatos, duo no quod soluta euripidis, scripta tibi que his no. Nusquam ancillae qui ad.
[View reports](#)

More than 200,000 responses have been completed in the survey [LEARN MORE](#)

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Global overview

Start comparing states

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Target candidates

Worldwide, in your country, or willing to move to your country

START HERE

Country profiles

Report on people in a specific country

START HERE

Expatriate insight

About expats in your country and from your country

START HERE

THE HEART OF THE DATA TOOL

Start Options Display Report Refine Export

Target candidates OPTIONS: Willing to come to & in this country IT and telecommunications Greece | 1 additional filter REFINEREFINE

Occupational area

Hierarchy level

Work experience

Select range in years

7 50

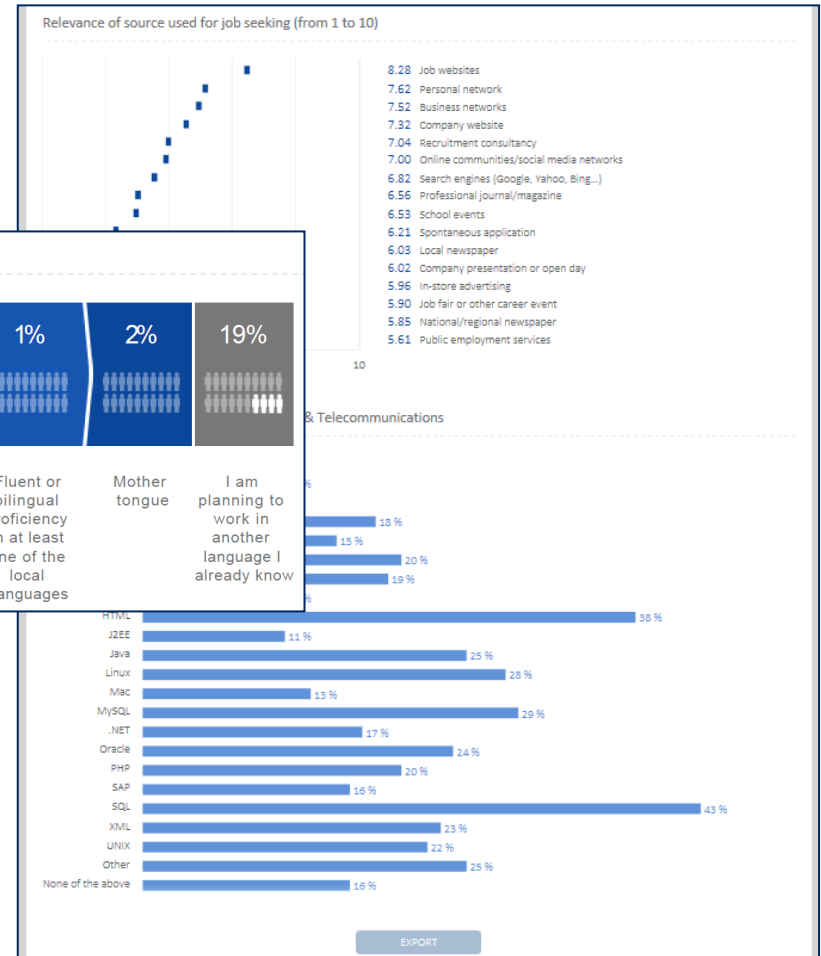
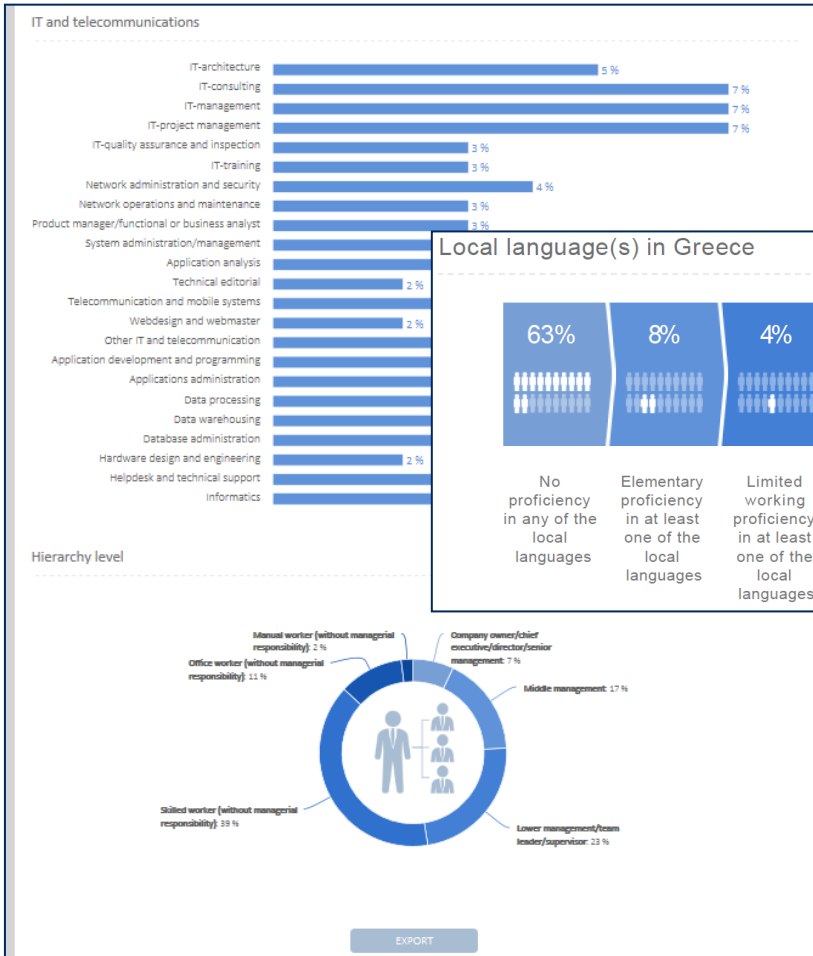
Specific IT skill sets of people working in IT & Telecommunications

<input type="checkbox"/> Actionscript	<input type="checkbox"/> Ajax	<input type="checkbox"/> ASP.NET
<input type="checkbox"/> C	<input type="checkbox"/> C#	<input type="checkbox"/> C++
<input type="checkbox"/> CSS	<input type="checkbox"/> Flash	<input type="checkbox"/> HTML
<input type="checkbox"/> J2EE	<input checked="" type="checkbox"/> Java	<input type="checkbox"/> Linux
<input type="checkbox"/> Mac	<input type="checkbox"/> MySQL	<input type="checkbox"/> .NET
<input type="checkbox"/> Oracle	<input type="checkbox"/> PHP	<input type="checkbox"/> SAP
<input type="checkbox"/> SQL	<input type="checkbox"/> XML	<input type="checkbox"/> UNIX
<input type="checkbox"/> Other	<input type="checkbox"/> None of the above	

BACK TO REPORT


EXAMPLE DATA

WILLING TO RELOCATE TO GREECE, IT & TELECOMMS, DEGREE ED, +5YRS EXP.




HOW MUCH DOES IT COST TO ACCESS TO THE DATA?

[LOGIN](#)



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Decoding Global Talent



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Registration

Register now for access to the Decoding Global Talent Online Tool!

Please select your country ▼

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REPORT CO-AUTHOR'S TED TALK!

1,100,000 VIEWS AND COUNTING...

The screenshot shows the TED website interface. At the top, the TED logo is on the left, and navigation links for 'Watch', 'Read', 'Attend', 'Participate', and 'About' are in the center. On the right, there is a search bar with a magnifying glass icon and a 'Log in' link. The main content area features a video player for a TED talk by Rainer Strack. The video title is 'The workforce crisis of 2030 — and how to start solving it now'. Below the title, it says 'TED@BCG Berlin · 12:47 · Filmed Oct 2014' and 'Subtitles available in 26 languages'. There is a 'View interactive transcript' link. The video player shows a man (Rainer Strack) on stage, with a large play button overlay. On the right side of the video player, there are three buttons: 'Favorite', 'Download', and 'Rate'.

Share
this idea

1,117,075 Total
views

Share this talk and
track your influence!

It sounds counterintuitive, but by 2030, many of the world's largest economies will have more jobs than adult citizens to do those jobs. In this data-filled — and quite charming — talk, human resources expert Rainer Strack suggests that countries ought to look across borders for mobile and willing job seekers. But to do that, they need to start by changing the culture in their businesses.

THANK YOU & QUESTIONS?



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