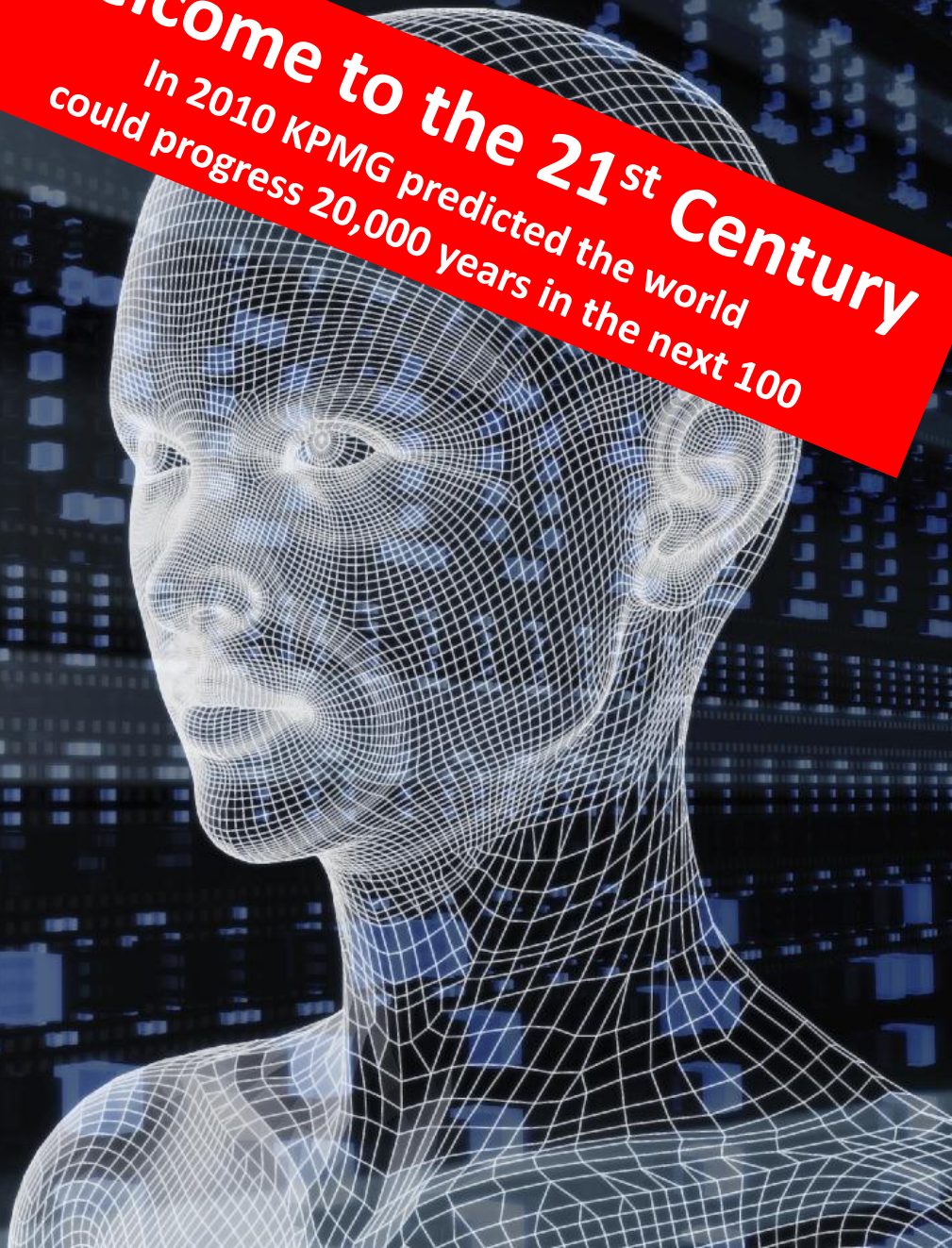




Welcome to the 21st Century

In 2010 KPMG predicted the world
could progress 20,000 years in the next 100

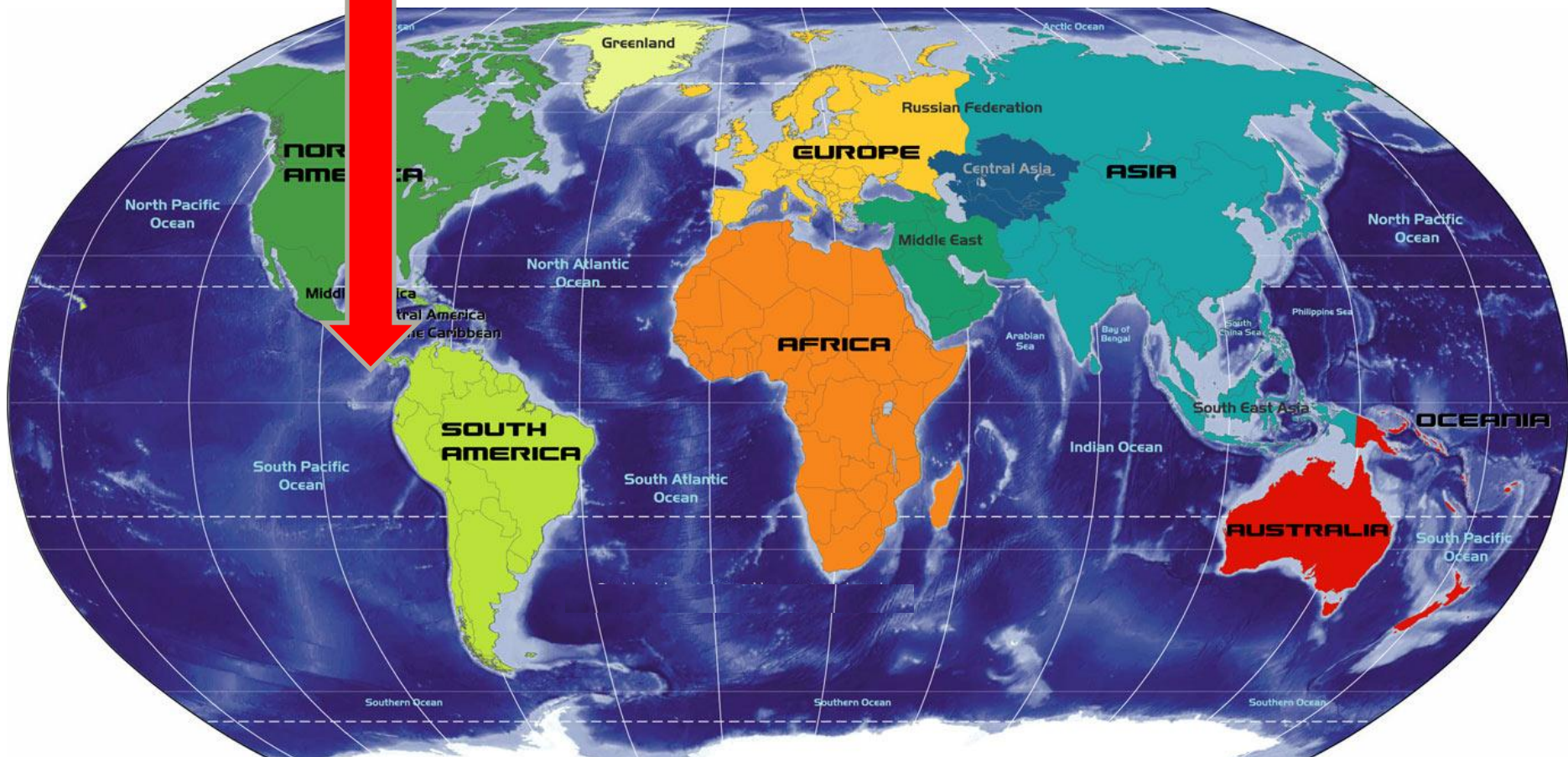


**Demographically
Sociologically
Technologically
Economically...**



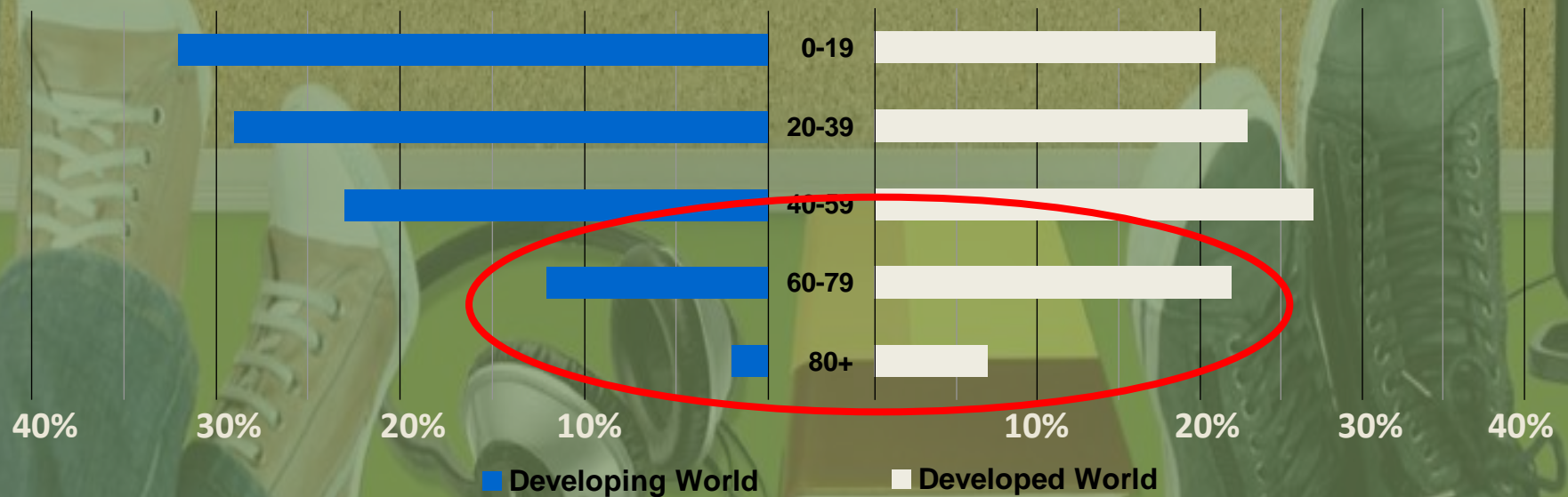
We have entered a Social & Business Revolution

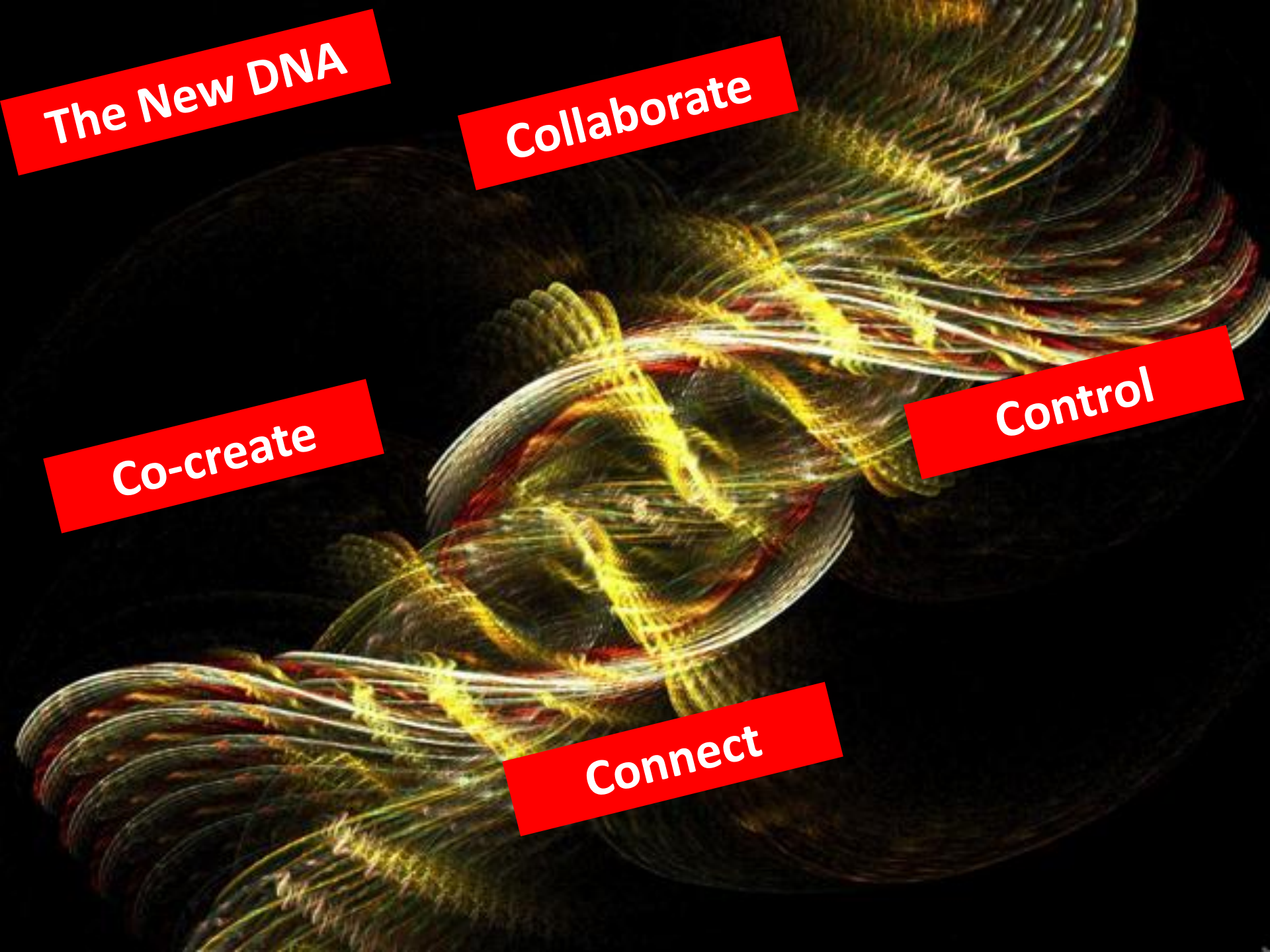
It isn't just financial capital that is
heading east  and
south 



Generational Shifts Across the World

Contrasts in Age Distribution in 2030





The New DNA

Collaborate

Co-create

Control

Connect



Introducing the TalentSumer

**I want to
renegotiate
my social
contract.**

**“We are about to see
America unleashed in a
way that our capitalism
model has never
experienced and we
have never witnessed”**

Rank	Drivers	Driver score	
		10=High	1=Low
1	Talent - driven innovation	9.22	
2	Cost of labor and materials	7.67	
3	Energy cost and policies	7.31	
4	Economic, trade, financial and tax systems	7.26	
5	Quality of physical infrastructure	7.15	
6	Government investments in manufacturing and innovation	6.62	
7	Legal and regulatory system	6.48	
8	Supplier network	5.91	
9	Local business dynamics	4.01	
10	Quality and availability of healthcare	1.81	

United States and Canada

Drivers

Talent-driven innovation

Cost of labor and materials

Economic, trade, financial and tax

Energy cost and policies

Legal and regulatory system

Quality of physical infrastructure

Government's investments in manufactu

Supplier network

Local business dynamics

Quality and availability of healthca

Europe

Drivers

Talent-driven innovation

Energy cost and policies

Quality of physical Infrastructure

Cost of labor and materials

Legal and regulatory system

Economic, trade, financial and tax sy

Supplier network

Government's investments for manufacturin

Local business dynamics

Quality and availability of healthcare

Asia

Drivers

Talent-driven innovation

Government's investments in manufacturing and innovation

Cost of labor and materials

Economic, trade, financial and tax systems

Energy cost and policies

Quality of physical infrastructure

Legal and regulatory system

Supplier network

Local business dynamics

Quality and availability of healthcare

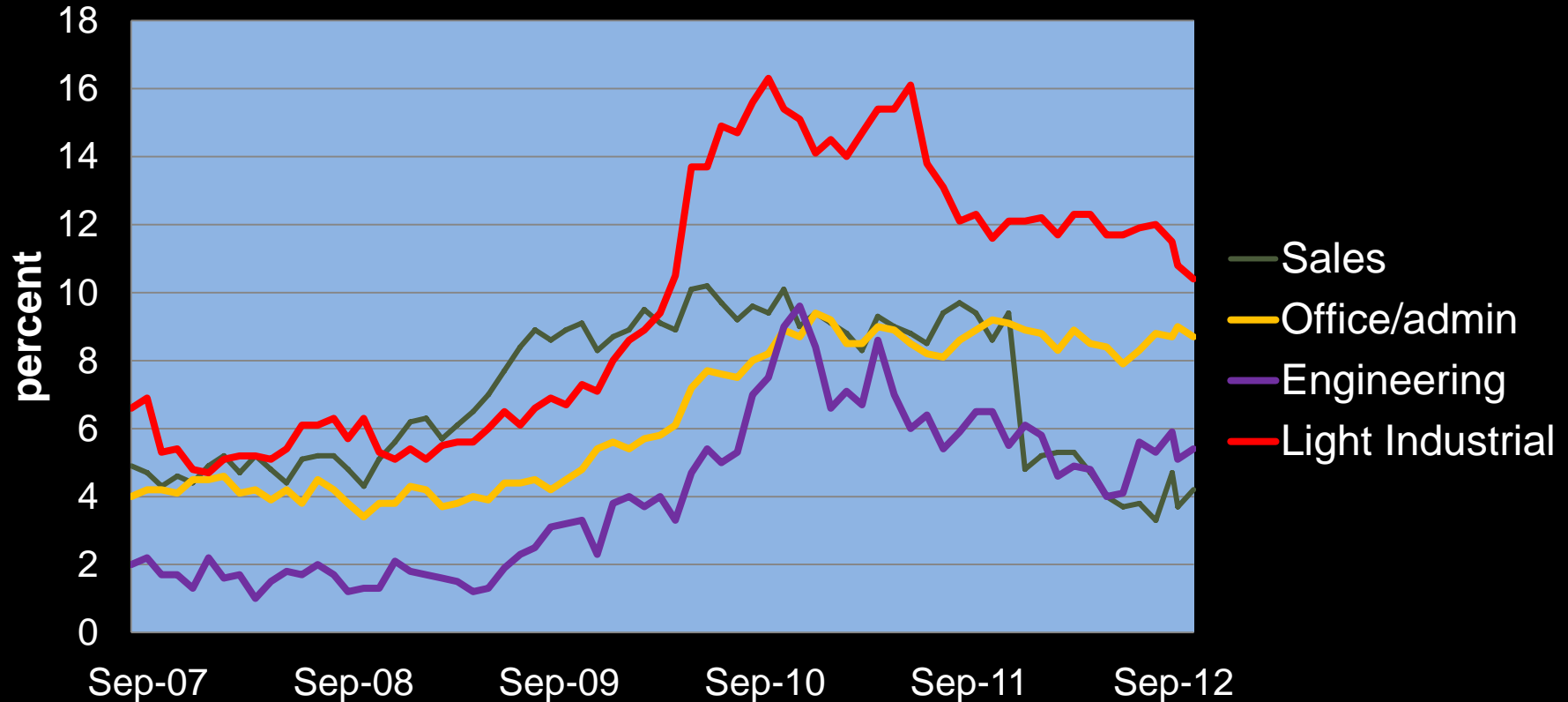
The US Landscape

- From the peak of payroll employment in Dec. 2007 to the trough in Dec. 2009, the U.S. lost 8.4M jobs.

- This loss was equivalent to 10 months of the previous growth rate. Since the trough, the U.S. has added 1.8M jobs or 20%.

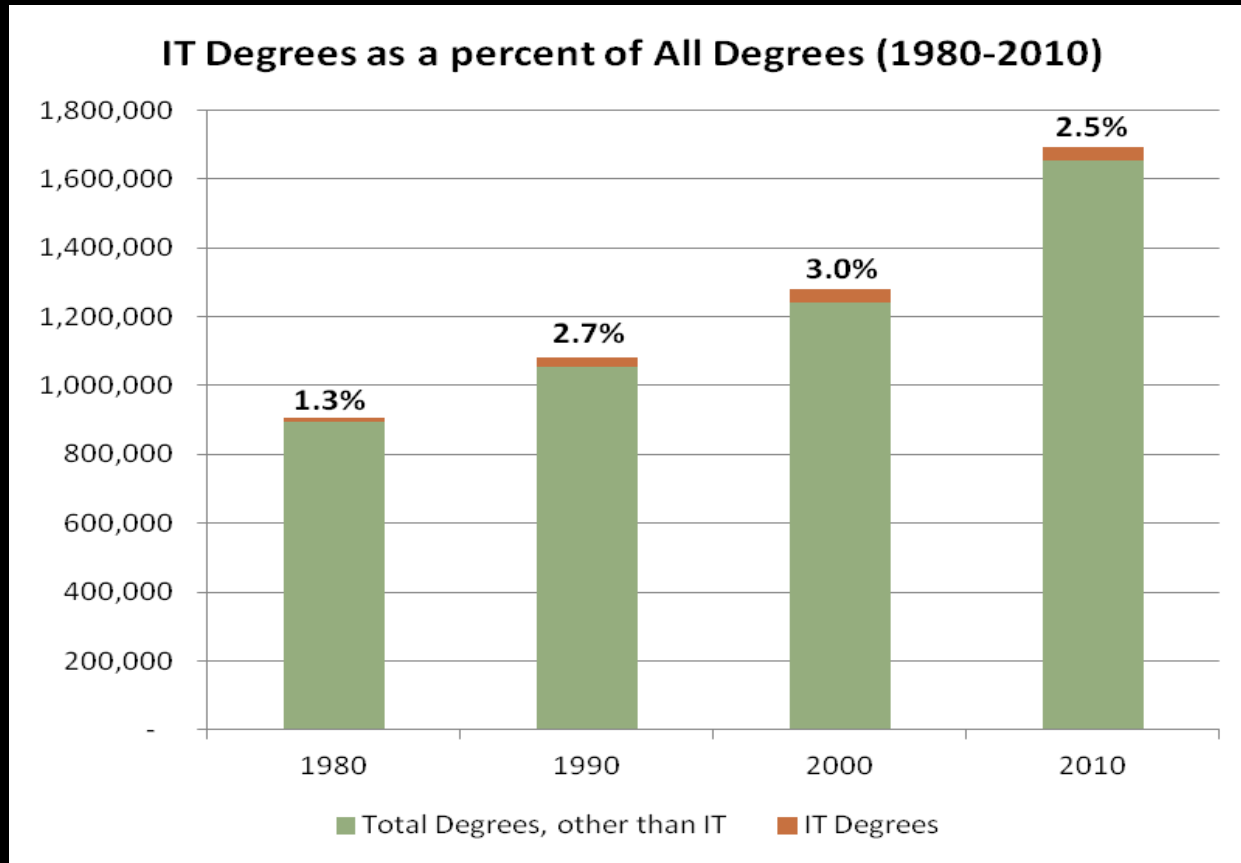
COMBINED.

Some Occupations Are Tighter Than Others



Source: BLS

The I.T. Dilemma: More Jobs Than People



- As a percentage of total degrees, there are fewer degrees conferred in Comp. Science now than in 1990.
- In 1990, associates degrees made up 31% of all degrees and **24%** of IT degrees. In 2010, associates are 33% of all degrees but **45%** of I.T. degrees.
- BLS expects 144K new I.T. jobs to be created or backfilled annually through 2018. If every I.T. graduate took an I.T. job, that would only account for half of the fills.

Massachusetts Industries with the Largest Job Growth Since 2011

Industry	Massachusetts		Nationally		Percent of National Industry in Mass.	Percentage of National Job Growth Accounted for in MA.
	June 2012 (Thousands)	Over the Year Change (Thousands)	June 2012 (Thousands)	Over the Year Change (Thousands)		
Retail trade	352.9	9.2	14759.8	103.6	2.39%	8.88%
Employment services	67.7	8.5	3210.9	264.8	2.11%	3.21%
Health care and social assistance	518.4	7.3	16982.1	348.1	3.05%	2.10%
Computer systems design and related services	65.3	6.7	1597.4	68.8	4.09%	9.74%
Architectural and engineering services	36.5	1.0	1338.8	32.0	2.73%	3.13%
Accounting and bookkeeping services	20.2	0.9	884.1	14.2	2.28%	6.34%
Insurance Carriers and related activities	63.9	0.4	2291.7	2.9	2.79%	13.79%

With the exception of Retail Trade, most of Massachusetts growing industries are employers of high skilled workers. Computer Systems Design job growth is exploding and has been gaining since 2010. Since last year, 1 out of every 10 new IT jobs created nationally are in Massachusetts. Employment Services, a leading market indicator for future hiring, is the second fastest growing industry locally with 8,500 jobs since last year keeping Mass. on par with national trends.

Massachusetts Industries Declining Since 2011

Industry	Massachusetts		Nationally		Percent of National Industry in Mass.	Percentage of National Job Growth Accounted for in MA.
	June 2012 (Thousands)	Over the Year Change (Thousands)	June 2012 (Thousands)	Over the Year Change (Thousands)		
Real estate and rental and leasing	40.1	-1.0	1995.5	37.5	2.01%	-2.67%
Securities	41.7	-1.9	804.9	-6.5	5.18%	-29.23%
Government	432.5	-3.8	21907.0	-202.0	1.97%	-1.88%
Construction	110.3	-5.4	5718.0	14.0	1.93%	-38.57%

Massachusetts' declining industries have mixed skill levels. One with lower skill levels, Construction, had the largest variance from national trends with a notable decline despite national job growth. Real estate saw a similar pattern.

Remarkably, 1 out of every 3 jobs lost in securities nationally since last year was within Massachusetts. Government's issues locally reflect national trends as well.

The Perfect Storm

The changing social contract

The slow economic recovery

The demand for skills in emerging markets

The growing need for contingent workers

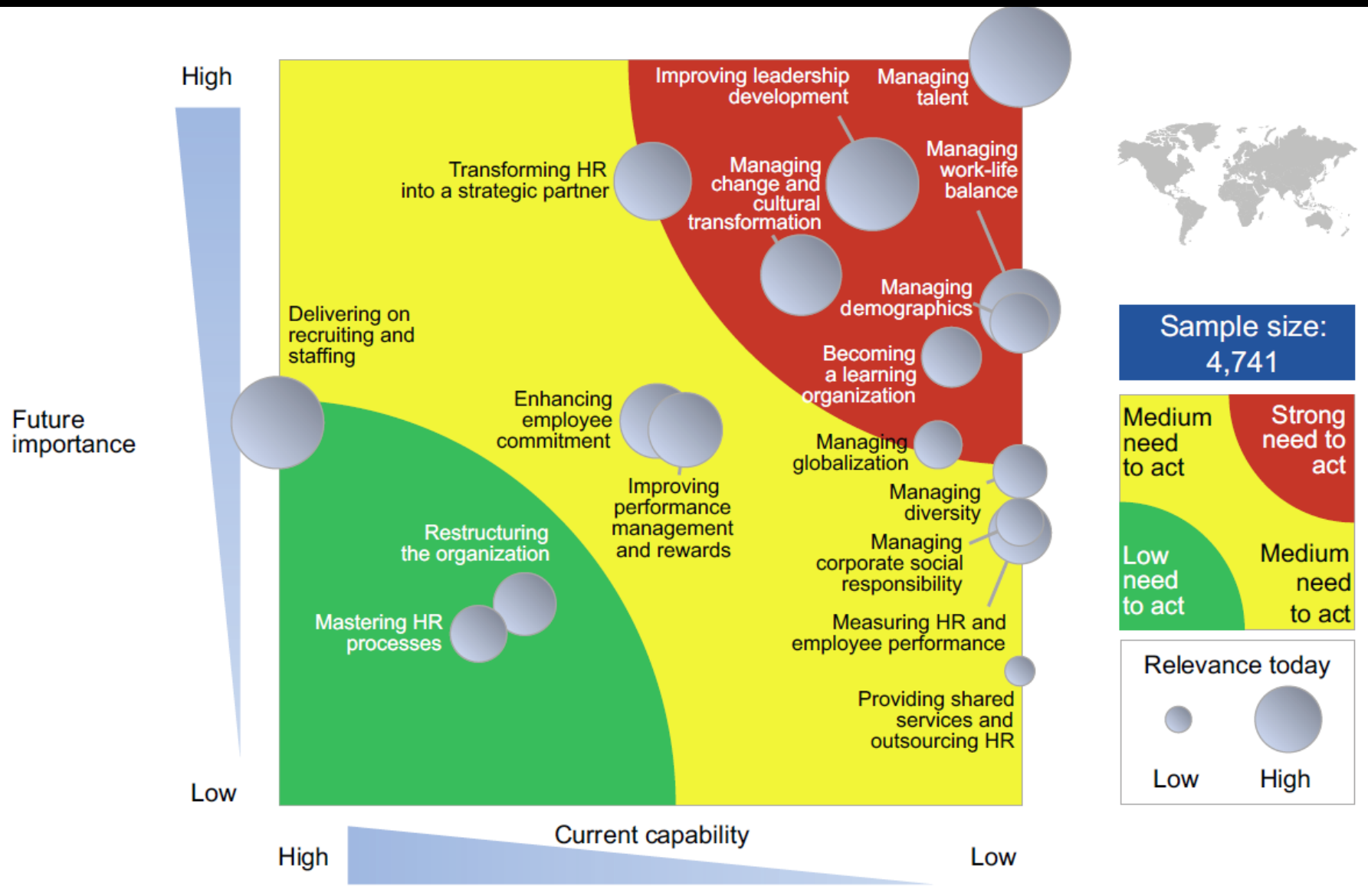
Talent driven innovation

The passage of national healthcare





So, what are we seeing companies doing to get ready?



A group of people are playing beach volleyball on a sandy beach. The ocean waves are breaking in the background. A volleyball is in the air. The scene is captured in a wide shot, showing the players and the beach environment.

Make Work Social

Take a Holistic View
One World One Workforce



Where do we believe the talent acquisition industry is headed?

ONE WORD

Integration





Thank You

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