2027 OUTLOOK

AgileOne

WORK SOLUTIONS
MARKET OVERVIEW

2027

CONTROL IN A COMPLEX WORKFORCE:

Rethinking Talent Strategy in an Era of Regulation and Change





TABLE OF CONTENTS

About This Report . . . 3

About AgileOne . . . 4

Executive Introduction . . . 5

Global Trends . . . 6

- 1. Economic and geopolitical volatility . . . 7
- 2. Skills scarcity . . . 9
- 3. Work is fragmenting across more channels . . . 9
- 4. Regulation and transparency . . . 10
- 5. AI and automation . . . 11
- 6. Data and ecosystem integration . . . 12

United States Overview . . . 13

Europe Overview . . . 16

- UK and Ireland . . . 17
- The Netherlands . . . 20
- DACH Region . . . 22

India Overview . . . 26

Latin America Overview . . . 31

Top Solutions . . . 35

Endnotes . . . 38

ABOUT THIS REPORT

AgileOne's 2027 workforce outlook examines the global labor market at a moment of growing economic, technological, and regulatory complexity. Hiring has cooled in many markets without becoming simple. Critical skills remain scarce, cost pressures have not fully subsided, and most organizations now run a workforce that spans permanent employees, contingent labor, independent contractors, statement-of-work teams, outsourced service providers, and, increasingly, AI-enabled workflows. At the same time, economic and geopolitical volatility, new technologies, and evolving regulation are changing both how work gets done and how organizations access and manage talent. This report brings those forces together, examining what labor markets are doing, how workforce models are evolving, and why effective workforce strategy increasingly depends on orchestrating the right mix of talent, suppliers, technologies, and engagement models.

It is written for HR, procurement, and workforce leaders who must act on that picture, deciding where to hire, what to outsource, how to structure external labor, and where to direct workforce investments in 2027. The report opens with the global forces reshaping workforce strategy, then moves through the markets where our clients concentrate their operations, with energy and utilities, technology, manufacturing, and life sciences as recurring lenses. Each regional overview closes with our own read on what the conditions mean in practice. The final section sets out recommended solutions for building a workforce model that can shift with demand and regulation without losing cost visibility, compliance, or access to talent. Readers should come away with a clearer understanding of where their workforce model needs to adapt — and which talent, sourcing, technology, and governance decisions deserve attention now.





ABOUT AGILEONE

In an increasingly complex workforce environment, organizations need the flexibility to respond to changing talent demands while maintaining visibility, control, and compliance across how work gets done. AgileOne serves as a single, trusted partner, bringing together workforce solutions, technology, consulting expertise, and experienced delivery teams to help organizations navigate change and build a more integrated workforce strategy.

We help companies manage the unexpected through a comprehensive suite of work solutions:

- **Managed Service Provider (MSP):** Our MSP programs help organizations optimize their external workforce strategies through technology, supplier management, workforce visibility, and governance, supporting greater efficiency, cost control, and compliance.
- **Services Procurement:** We streamline the procurement and management of service-based engagements, including consulting, creative, and IT projects, improving cost transparency, compliance, and alignment between spend, deliverables, and business objectives.
- **Contingent Work Solutions:** We help organizations access and manage flexible talent pools, giving them the ability to scale workforce capacity and respond more quickly to changing business and skill demands.
- **Statement of Work (SOW) Management:** We provide greater visibility and control over project-based work, helping organizations manage spend, supplier performance, deliverables, and workforce risk more effectively.
- **Recruitment Process Outsourcing (RPO):** Our RPO services provide scalable hiring support that helps organizations attract and secure the talent they need while improving recruiting efficiency, consistency, and cost effectiveness.
- **Direct Sourcing:** We enable clients to build and manage curated talent communities using their employer brand and technology to attract, engage, and redeploy high-quality contingent talent more efficiently.

EXECUTIVE INTRODUCTION

As organizations look toward 2027, the labor market is moving into a new phase: growth is resilient but uneven, talent remains scarce in critical occupations and locations, technology is changing how work gets done, and organizations have more ways than ever to access and deploy talent. At the same time, the rules governing those choices are becoming more consequential and landing earlier in workforce planning than they used to.

The global economy has held up better than many expected, but the operating environment is not becoming simpler. The International Monetary Fund (IMF) projects global growth of 3.1 percent in 2026 and 3.4 percent in 2027, with technology investment supporting some economies even as energy and geopolitical shocks weigh on others. Global headline inflation has also proved sticky, leaving employers to manage continued cost pressure while demand varies sharply by market and industry.[1]

Across the OECD, employment reached a record 670 million in May 2026, while the unemployment rate stood at 5.0 percent in September.[2]

Labor markets tell a similarly mixed story. The International Labour Organization (ILO) expects the global unemployment rate to remain at 4.9 percent in 2026 — or roughly 186 million people — but warns that stable headline unemployment masks persistent deficits in job quality, informality, and access to social protection. Across the Organisation for Economic Co-operation and Development (OECD), employment reached a record 670 million in May 2026, while the unemployment rate stood at 5.0 percent in September. Employment growth is projected at only 0.3 percent in 2026 and 0.6 percent in 2027.[2,3] The broad market, in other words, is not short of workers everywhere. It is short of the right skills, in the right places, under the right employment conditions.

That distinction matters because the workforce itself is becoming more distributed. Organizations routinely blend employees, agency workers, independent contractors, outsourced service providers, statement-of-work teams, platform labor, and increasingly AI-enabled workflows. Globalization is now table stakes. The harder question is how to coordinate this mix without losing control of classification, pay, tax, data, worker protections, supplier accountability, or the quality of the work itself. Increasingly, those questions have to be settled when work is scoped and sourced, not discovered later.

Compliance is moving upstream.

What was once checked after the fact — a supplier audit, a classification review, a pay report filed at year-end — is becoming part of the decision itself.

Across the markets examined in this report, regulation is converging around a common set of concerns: pay transparency and equity, the treatment of flexible and platform workers, accountability inside labor supply chains, the use of AI in employment decisions, and the boundaries between employees and non-employees. The specific rules differ dramatically, but the direction is consistent: organizations are being asked to know more about how workers are sourced, paid, classified, evaluated, and managed, including work delivered through third parties.

For workforce leaders, this creates an important shift in emphasis. The goal is no longer simply to fill requisitions or reduce rates. It is to build a workforce architecture that can absorb demand swings, reach constrained skills, and change its mix as regulation and economics move. AgileOne's role in that environment is increasingly that of an orchestrator: helping clients determine where permanent hiring, contingent labor, an MSP, direct sourcing, services procurement, or another model is most appropriate, and then building the visibility and controls into that model from the outset rather than layering them on afterward.


GLOBAL
TRENDS

GLOBAL TRENDS

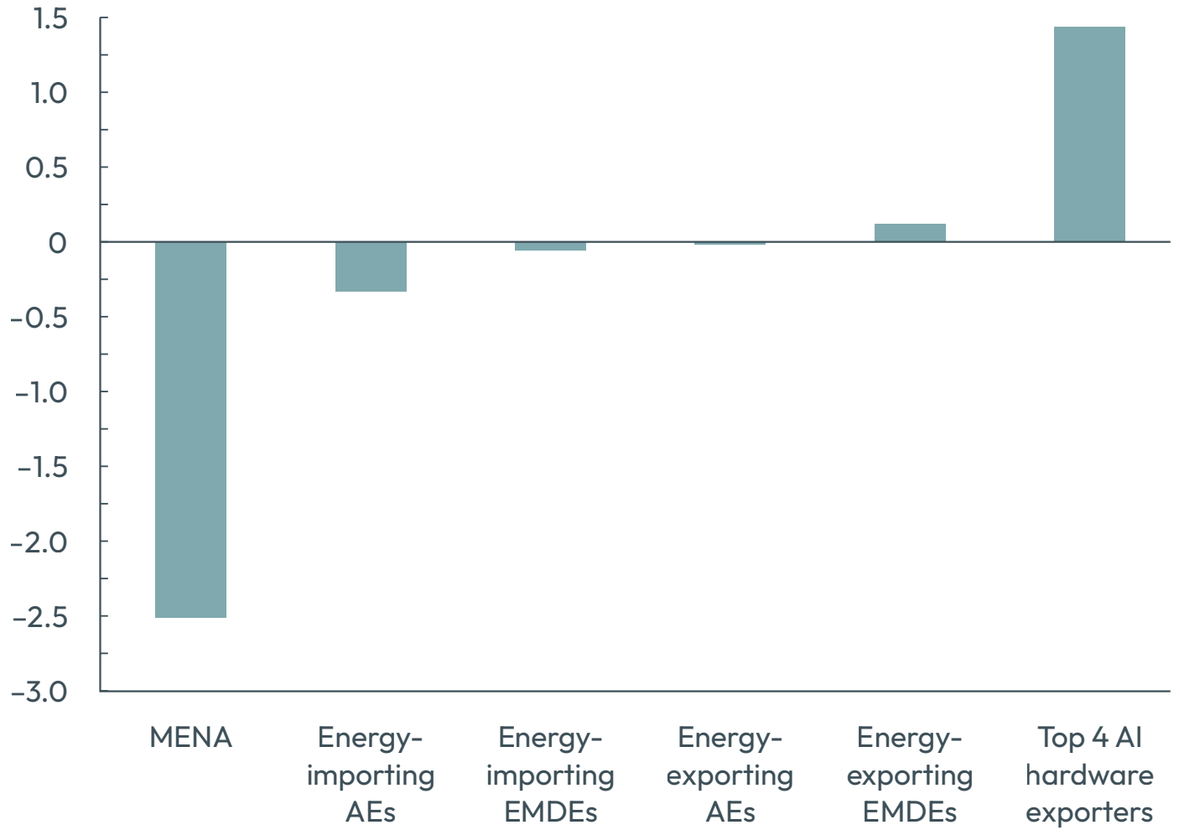
Six forces are reshaping workforce strategy across the markets in this report. Economic and geopolitical volatility is making flexibility more valuable even as critical skills remain difficult to access in particular occupations and locations. At the same time, work is being distributed across a wider mix of employees, contingent workers, service providers, independent talent, and AI-enabled workflows. Regulation and transparency requirements are making those choices more consequential, while AI is changing both how work gets done and how workforce programs operate. As complexity increases, the ability to orchestrate workforce data, technologies, suppliers, and engagement models is becoming the foundation for visibility and control.

1. ECONOMIC AND GEOPOLITICAL VOLATILITY IS INCREASING THE VALUE OF WORKFORCE FLEXIBILITY

Energy and geopolitical volatility have re-entered workforce planning. The IMF's July outlook describes a global economy caught between an energy shock and a technology-driven investment cycle, with global headline inflation revised upward and risks still tilted to the downside.[5] The workforce implication is less about predicting the next shock than maintaining options. Employers exposed to energy, trade, or supply chain volatility need access to project talent, temporary capacity, redeployment pathways, and market intelligence that can move with operating demand.

Impact of geopolitical conditions on growth revisions, according to the IMF[4]

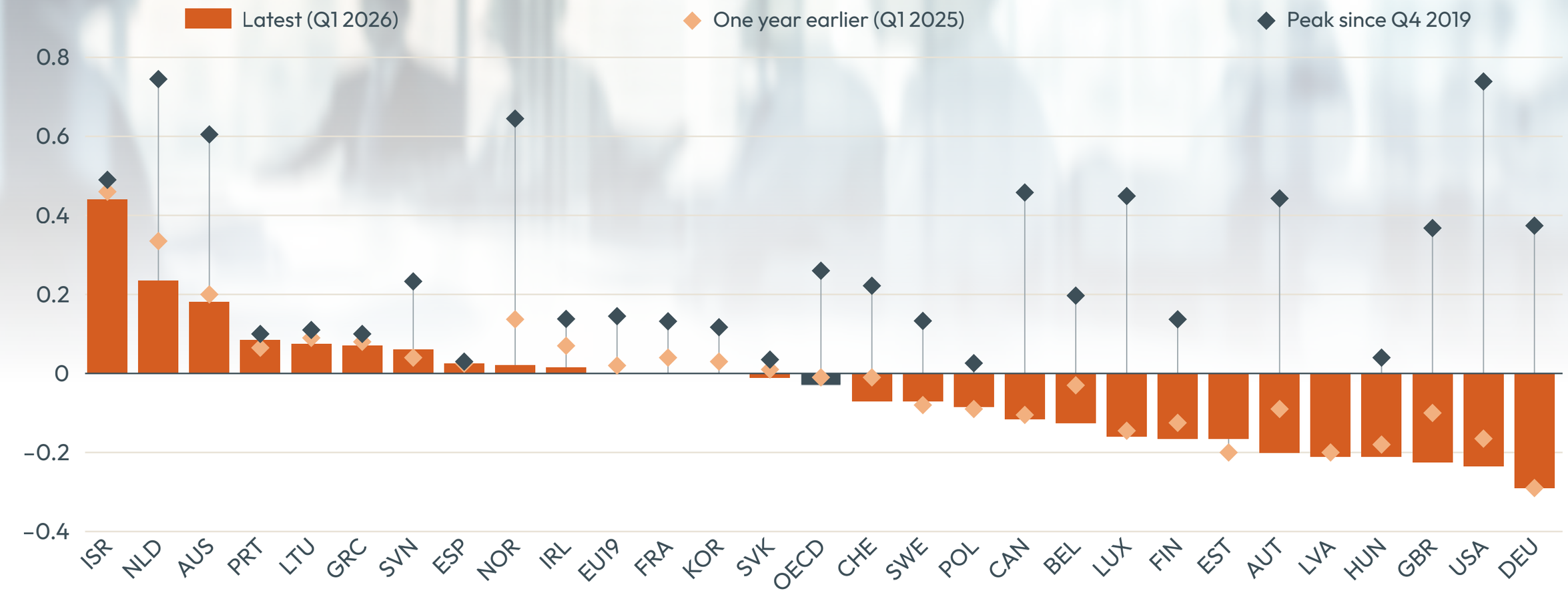
Percentage points; revision to cumulative 2026–27 growth forecast, July 2026 WEO Update minus January 2026 WEO Update



Note: The bars denote purchasing-power-parity-weighted group means of each country's cumulative-growth revision. Bahrain, Iran, Iraq, Kuwait, Qatar, Saudi Arabia, and the United Arab Emirates are included in "MENA" (Middle East and North Africa) but excluded from "Energy-exporting EMDEs." Energy exporters and importers are classified using 2024 oil, natural gas, and coal trade data. Top 4 AI hardware exporters are Korea, Malaysia, Taiwan Province of China, and Thailand. AI hardware exports include those classified under Harmonized System codes 847150, 847170, 847180, 847330, 848610, 848620, 848630, 848640, 848690, 854231, and 854232. AEs = advanced economies; AI = artificial intelligence; EMDEs = emerging market and developing economies; WEO = World Economic Outlook.

Labor market tightness is close to or below pre-COVID-19 levels in most countries[6]

Difference in the vacancies-to-unemployed ratio relative to its Q4 2019 level



AgileOne

2. SKILLS SCARCITY IS BECOMING MORE SPECIFIC AND LOCATION-DEPENDENT

The “labor shortage” narrative is too broad for 2026. In many markets, hiring has cooled, vacancies have fallen, and unemployment remains manageable. Yet shortages persist in occupations connected to health, engineering, energy, digital infrastructure, cybersecurity, advanced manufacturing, and specialized life sciences. OECD analysis also shows that trade and technology shocks affect local labor markets differently depending on industry mix and mobility. This makes geographic and skills-level intelligence more useful than national headline unemployment alone.[7]

For energy and utilities, the constraint is often skilled trades, engineering, project management, and grid and data infrastructure talent. Technology employers face a paradox of softer general hiring alongside continued competition for AI, cloud, cyber, and data skills. Manufacturing needs technicians, maintenance, engineering, automation, and supply chain expertise even where production employment is flat. Life sciences combines specialized scientific and regulatory talent with highly location-specific clusters. In all four industries, the most effective sourcing strategy may involve a wider geography, a different worker type, or a skills-based rather than credential-based search.

3. WORK IS FRAGMENTING ACROSS MORE CHANNELS

Organizations increasingly distribute work across permanent employees, agency workers, independent contractors, statement-of-work teams, outsourced service providers, platform labor, and AI-enabled workflows. Volatile demand, project-based transformation, and scarce skills make that flexibility more valuable. But as the number of available channels expands, the choice of how work gets done becomes more consequential. Regulators are drawing clearer lines around platform work, independent contracting, agency work, umbrella arrangements, and subcontracting chains. The EU Platform Work Directive, for example, must be transposed by member states by December 2026 and combines employment status questions with transparency and human oversight rules for algorithmic management.[8] In the U.S., federal policy on independent contractor and joint employer standards continues to evolve, while state tests add another layer of variation.

This does not mean organizations should retreat from non-employee labor. It means worker-type choice has to be deliberate and backed by factually accurate working practices that support the engagement method. When the work is ongoing, closely supervised, and central to a team’s day-to-day operations, an employee or agency-worker model may be more defensible. When the buyer is purchasing a defined outcome, and the provider controls delivery, SOW may be more appropriate. The strategic discipline is to start with the work: duration, supervision, deliverables, skills, location, and risk, before choosing the contractual label.

What This Means for Procurement

Supplier due diligence is becoming workforce due diligence. Procurement leaders increasingly need visibility not only into Tier 1 vendors, but also into subcontractors, pay practices, worker classification, AI tools, and financial resilience deeper in the labor supply chain.

4. REGULATION AND TRANSPARENCY ARE BECOMING WORKFORCE DESIGN VARIABLES

Worker protections and transparency requirements are expanding across both mature and emerging labor markets, but not through a single regulatory model. Europe is moving through broad, rights-based frameworks covering pay transparency, platform work, AI, and flexible employment. The United States is adding complexity through state and local pay-transparency and automated-hiring rules layered onto federal wage-and-hour and classification requirements. India has replaced a fragmented set of 29 central labor laws with four consolidated labor codes, and Brazil has enacted a phased reduction in the standard workweek while expanding family leave protections. The implication is that compliance is not the product, but it is increasingly the lens through which workforce choices must be tested.

Regulatory intensity across the four regional markets[9]

Internal analysis, based on the themes in this report

Theme	U.S.	Europe	India	Brazil
Pay transparency	High	High	Med	Med
AI / automated hiring	High	High	Emerging	Emerging
Worker classification	High	High	High	High
Supplier / chain liability	Med	High	High	Med
Flexible / platform work	Med	High	High	High
Migration / mobility	High	Med	Med	Med

Methodology: Regulatory intensity reflects a qualitative comparative assessment of current laws, enforcement requirements, and emerging policy trends across six workforce-related themes. Ratings are relative across the four markets and indicate the degree of regulatory maturity, complexity, and employer/supplier compliance exposure rather than a standardized quantitative score.



Pay transparency illustrates how these requirements are moving directly into workforce design. The EU Pay Transparency Directive, with its June 7, 2026, transposition deadline, expands employer obligations around pay information, reporting, and enforcement.[10] In the United States, a growing patchwork of state laws requires salary ranges or other compensation information in job postings and restricts salary-history practices. The rules differ, but the strategic direction is the same: compensation architecture that once could remain informal or locally improvised is becoming visible to candidates, employees, regulators, and often investors. Transparency increasingly extends beyond pay to employment terms, schedules, data use, worker status and classification, and automated decision-making, placing a premium on clean job taxonomies, consistent rate structures, documented supplier processes, and auditable workflows.

For companies operating across borders, the challenge is less about knowing that regulation exists than translating it into operating rules. A global program may use one vendor management system (VMS), one supplier framework, or one direct-sourcing brand, but the legal definition of an employer, intermediary, worker, agency, or permissible contract can change at a national, state, or local border. The strongest programs are therefore becoming globally governed but
locally configurable.

What This Means for HR

Job architecture is becoming compliance infrastructure. Standardized job families, skills, pay bands, and worker-type definitions improve talent planning and make it much easier to satisfy transparency, equal-pay, and reporting requirements across multiple markets.

5. AI AND AUTOMATION ARE REDESIGNING WORK AND WORKFORCE OPERATIONS

AI is changing not only how organizations source and manage talent, but how work itself is divided between people, technology, and external providers. It is quickly becoming embedded in systems that source, screen, match, schedule, and manage talent, while automation is changing workflows and the skills organizations need. The value case is compelling: better matching, workflow automation, rate intelligence, and faster decisions can improve both candidate experience and program efficiency. But employment is also one of the areas where automated decisions are most likely to affect legal rights. That makes AI governance a workforce issue, not merely an IT issue.

Europe provides the clearest example. Under the EU AI Act, high-risk systems used in areas such as employment are scheduled to face the Act's obligations beginning on December 2, 2027, following the 2026 AI Omnibus.[11] Those requirements go well beyond a basic AI policy. Chapter III calls for a full governance infrastructure around high-risk AI: risk-management systems; data and data-governance controls; technical documentation and record-keeping; transparency; human oversight; and safeguards for accuracy, robustness, and cybersecurity. In practice, managing high-risk AI means building repeatable systems and processes around how tools are selected, tested, documented, monitored, challenged, and controlled throughout their lifecycle.

In the United States, New York City already requires bias audits and notices for certain automated employment decision tools. The regulatory structures differ, but they point toward common controls: organizations need to know where AI is being used, what decisions it shapes, whether its data and outcomes can be trusted, who is accountable for oversight, and what happens when a system produces an unexpected or potentially harmful result.

The practical risk is often invisible procurement. A hiring manager may never “buy AI” directly; rather, an applicant tracking system, assessment provider, staffing supplier, or sourcing platform may introduce it as a feature. Governance therefore has to extend into the supplier ecosystem. The question becomes not only “Are we using AI?” but “Where in the workforce supply chain is AI making or shaping decisions on our behalf?”

6. DATA AND ECOSYSTEM INTEGRATION ARE BECOMING THE BASIS OF WORKFORCE CONTROL

As workforce models multiply, no single hiring channel or system provides an adequate picture of the workforce. Control increasingly depends on connecting information across HR, procurement, suppliers, VMS and applicant tracking system (ATS) platforms, services procurement, and talent technologies. Organizations need to understand not only who is working, but what work is being performed, where it is happening, how workers are engaged and paid, which suppliers and technologies are involved, and where compliance or operational risk sits.

Many of the challenges described in this report are ultimately data challenges. Pay transparency requires reliable job and compensation data. Worker classification depends on understanding the work being performed and under whose control. Supplier accountability requires visibility into the labor supply chain, while AI governance requires an inventory of systems and the decisions they influence. The goal is not necessarily one workforce platform, but a common data model and shared language that connects job architecture, skills, worker type, location, supplier, rate or pay, tenure, engagement type, and risk across systems.





UNITED STATES
OVERVIEW

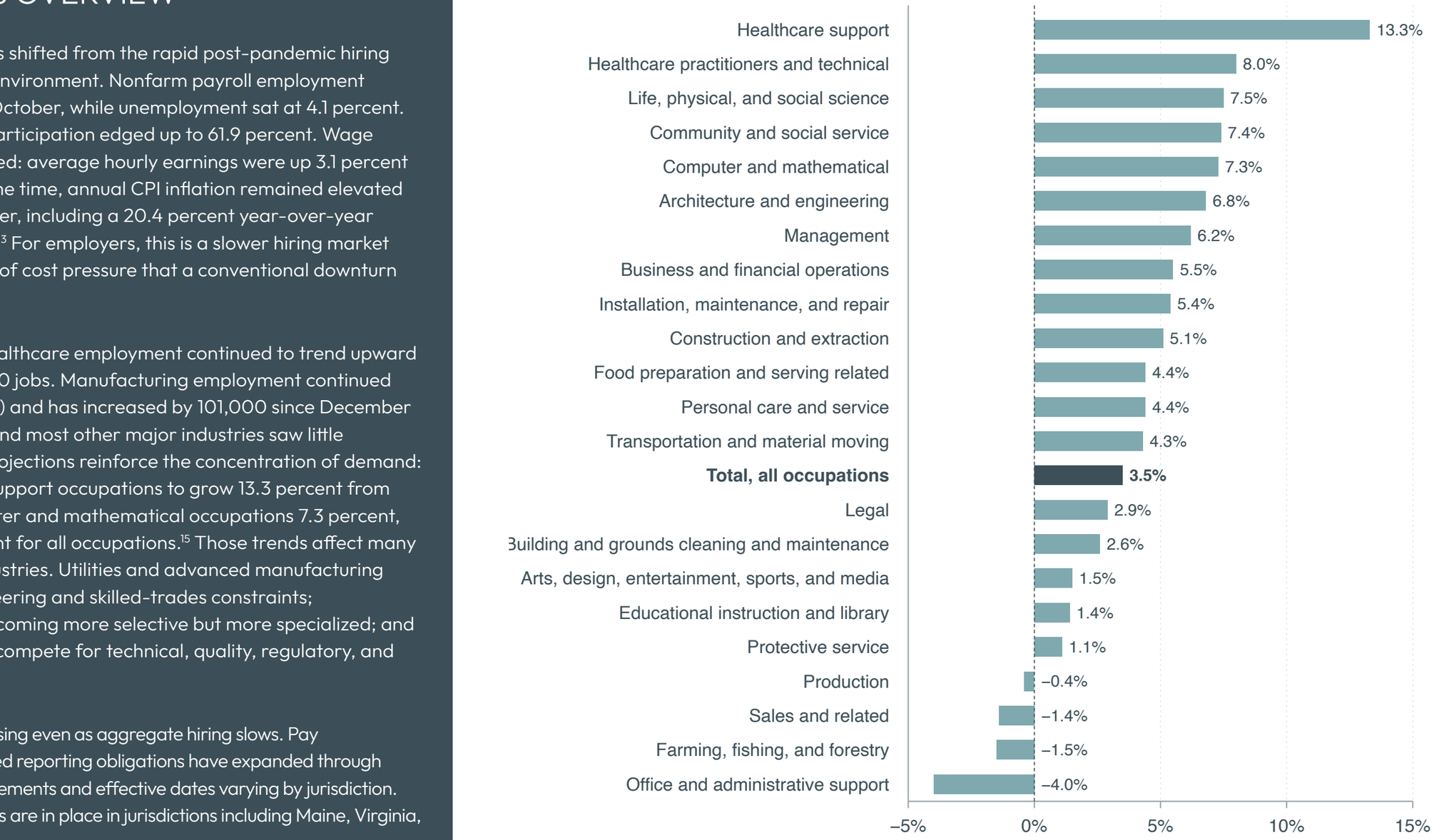
UNITED STATES OVERVIEW

The U.S. labor market has shifted from the rapid post-pandemic hiring cycle into a lower-churn environment. Nonfarm payroll employment increased by 165,000 in October, while unemployment sat at 4.1 percent. Meanwhile, labor force participation edged up to 61.9 percent. Wage growth has also moderated: average hourly earnings were up 3.1 percent over the year.[12] At the same time, annual CPI inflation remained elevated at 3.7 percent in September, including a 20.4 percent year-over-year increase in energy prices.[13] For employers, this is a slower hiring market without the clean release of cost pressure that a conventional downturn might bring.

The cooling is uneven. Healthcare employment continued to trend upward in October, adding 42,000 jobs. Manufacturing employment continued to trend upward (+19,000) and has increased by 101,000 since December 2025, while information and most other major industries saw little change.[14] Longer-term projections reinforce the concentration of demand: BLS expects healthcare support occupations to grow 13.3 percent from 2025 to 2035 and computer and mathematical occupations 7.3 percent, compared with 3.5 percent for all occupations.[15] Those trends affect many of AgileOne's priority industries. Utilities and advanced manufacturing remain exposed to engineering and skilled-trades constraints; technology demand is becoming more selective but more specialized; and life sciences continues to compete for technical, quality, regulatory, and clinical expertise.

Compliance complexity is rising even as aggregate hiring slows. Pay transparency and associated reporting obligations have expanded through state legislation, with requirements and effective dates varying by jurisdiction. New or amended 2026 rules are in place in jurisdictions including Maine, Virginia,

Projected percent change in employment, by occupational group, 2025-35[16]



What This Means for Talent Acquisition

As global talent mobility becomes more costly and uncertain, employers can reduce dependency on any one pipeline by combining domestic talent mapping, direct sourcing, alternative locations, reskilling, and governed external labor.

California, Connecticut, Washington, and New York. Therefore, multistate employers need consistent job architecture, defensible ranges, processes for remote roles, and alignment between employee and contingent-worker rate logic. A range that is compliant in one state can pose a risk in another if recruiters or suppliers use inconsistent templates.

Wage-and-hour, worker classification, and joint employer standards add a second layer of fragmentation. In April 2026, the U.S. Department of Labor proposed a new joint employer rule under the Fair Labor Standards Act (FLSA), Family and Medical Leave Act (FMLA), and Migrant and Seasonal Agricultural Worker Protection Act (MSPA), reinforcing the need to understand when a client's control over a worker or supplier relationship can create shared obligations.[17] The department is also revisiting independent contractor standards.[18] For contingent workforce programs, the practical safeguard is disciplined role intake, clear separation between staff augmentation and deliverable-based services, and governance that catches SOW engagements that function like individual labor.

Talent mobility is another source of constraint. The 2026 H-1B environment now favors higher-paid and higher-skilled registrations through a new weighted selection process implemented for the FY2027 cap season.[19] A separate $100,000 payment requirement for certain H-1B petitions was subject to implementing guidance that was vacated by a federal district court in June 2026; the First Circuit declined to stay that ruling in July while the government's appeal proceeds, although the administration has extended the underlying policy through September 2027.[20, 21] At the same time, the Department of Homeland Security has proposed a new $103,265 fee for all cap-subject H-1B petitions, including petitions involving workers already in the United States.[22] For employers that rely on global STEM pipelines, these changes increase both cost and uncertainty and raise the value of domestic talent mapping, alternative locations, direct sourcing, reskilling, and carefully governed external labor.

Finally, AI governance is beginning to move from policy discussion to hiring operations. New York City's automated employment rules already require bias audits and candidate/employee notices for covered tools, and several states are developing broader high-risk AI frameworks. The immediate client question is inventory: organizations should know which ATS, assessment, sourcing, interview, and supplier tools use AI, what decisions they influence, and who owns validation. Procurement and HR need a shared review process because employment AI often enters through a vendor rather than a standalone technology purchase.

AgileOne's Take: United States

A slower hiring market creates an opportunity to make the workforce model more intentional while competition remains acute for critical skills. Clients should use this period to map talent beyond traditional geographies, strengthen direct-sourcing pipelines, and determine where permanent hiring, contingent labor, or outcome-based services provide the best fit. A well-governed MSP can connect those choices to consistent job and rate architecture, multistate compliance controls, and stronger SOW intake.

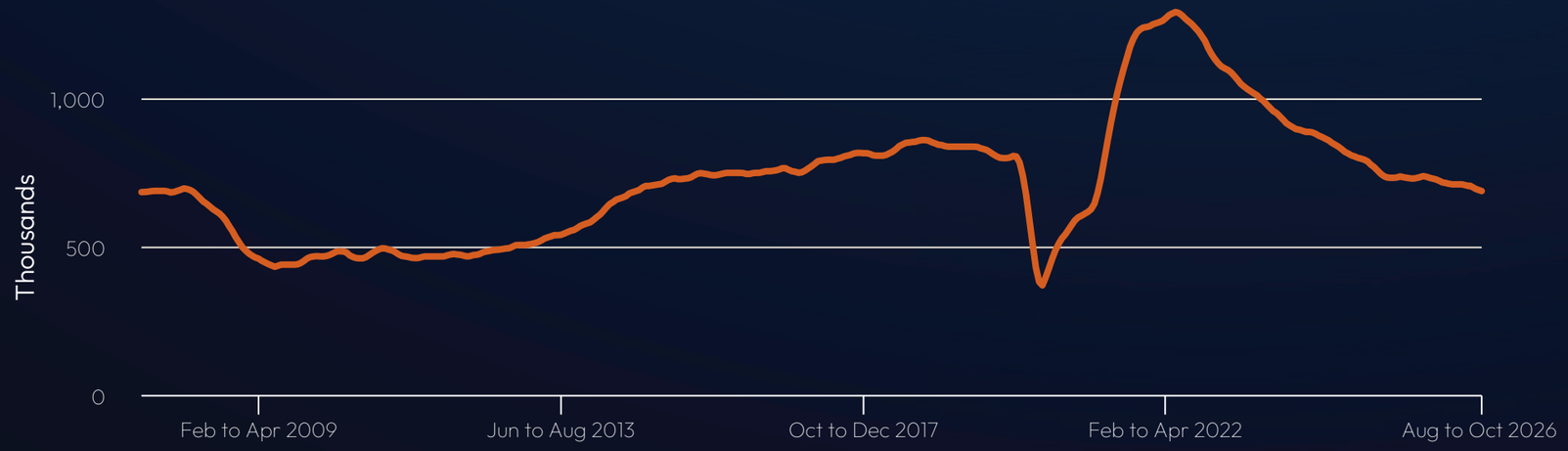



EUROPE
OVERVIEW

UK AND IRELAND

The UK and Ireland approach the end of 2026 with labor markets that are still relatively resilient, but no longer running at the intensity seen earlier in the decade. In the UK, the employment rate remained at 75.4 percent in July to September 2026, while unemployment fell to 4.6 percent. Employers advertised an estimated 690,000 vacancies in August to October 2026, down 5.0 percent from a year earlier and 3.0 percent from the previous quarter, marking the lowest vacancy level outside the pandemic period since 2014. Wage pressure is easing as well: regular earnings grew 3.5 percent year over year, compared with nearly 6 percent in early 2025. These figures point to a more selective hiring environment in which employers have greater access to candidates, but are also proceeding more cautiously with permanent headcount.[23,24]

UK vacancies, 2007–2026[25]





That softer market has not translated into a simpler workforce environment. One of the most consequential changes arrived on April 6, 2026, when new Joint and Several Liability rules governing umbrella companies shifted responsibility for unpaid Pay As You Earn (PAYE) and National Insurance contributions further up the labor supply chain. The party that contracts with the end-hirer can now be pursued for tax that a noncompliant umbrella company fails to remit, with responsibility falling to the end client where an umbrella is engaged directly. His Majesty's Revenue and Customs (HMRC) estimates that roughly 700,000 individuals work through umbrella companies and that the new regime will significantly affect approximately 30,000 agencies and 400 umbrella providers. The government estimates additional due diligence activity could produce £9.9 million in one-time business costs and £21.7 million in ongoing annual administrative costs.[26]

At least 275,000 of the roughly 700,000 workers using umbrella companies in 2022–23 were engaged at some point through providers that failed to comply with their tax obligations.

At least 275,000 of the roughly 700,000 workers using umbrella companies in 2022–23 were engaged at some point through providers that failed to comply with their tax obligations.[27] HMRC also estimates that £500 million was lost to disguised-remuneration tax avoidance schemes that year, almost all facilitated through umbrella companies.[28] The significance for employers extends beyond tax. The change effectively makes visibility into the labor supply chain part of workforce governance: approved provider lists, financial health monitoring, ownership checks, tax processes, and clear contractual responsibility are becoming as important as rate cards and fill rates. Outsourcing payroll can still make operational sense, but it no longer means outsourcing the underlying exposure if something goes wrong.

A second wave of change is arriving through the Employment Rights Act 2025. Implementation is being staged through 2026 and beyond, and the government is still consulting on important details affecting zero-hours and similar arrangements. The Act creates rights around guaranteed hours, reasonable notice of shifts, and compensation when shifts are canceled or curtailed at short notice, including provisions for qualifying agency workers. For agency workers, the legislation places important responsibilities on the hirer, although the final operating rules and timing remain unclear and under development.[29] The practical lesson is that temporary labor should not be viewed as a simple regulatory release valve from permanent employment. Employers will need better scheduling data, clearer forecasts of actual labor demand, and closer coordination among HR, procurement, staffing suppliers, and frontline managers to preserve flexibility without creating unnecessary cost or compliance exposure.

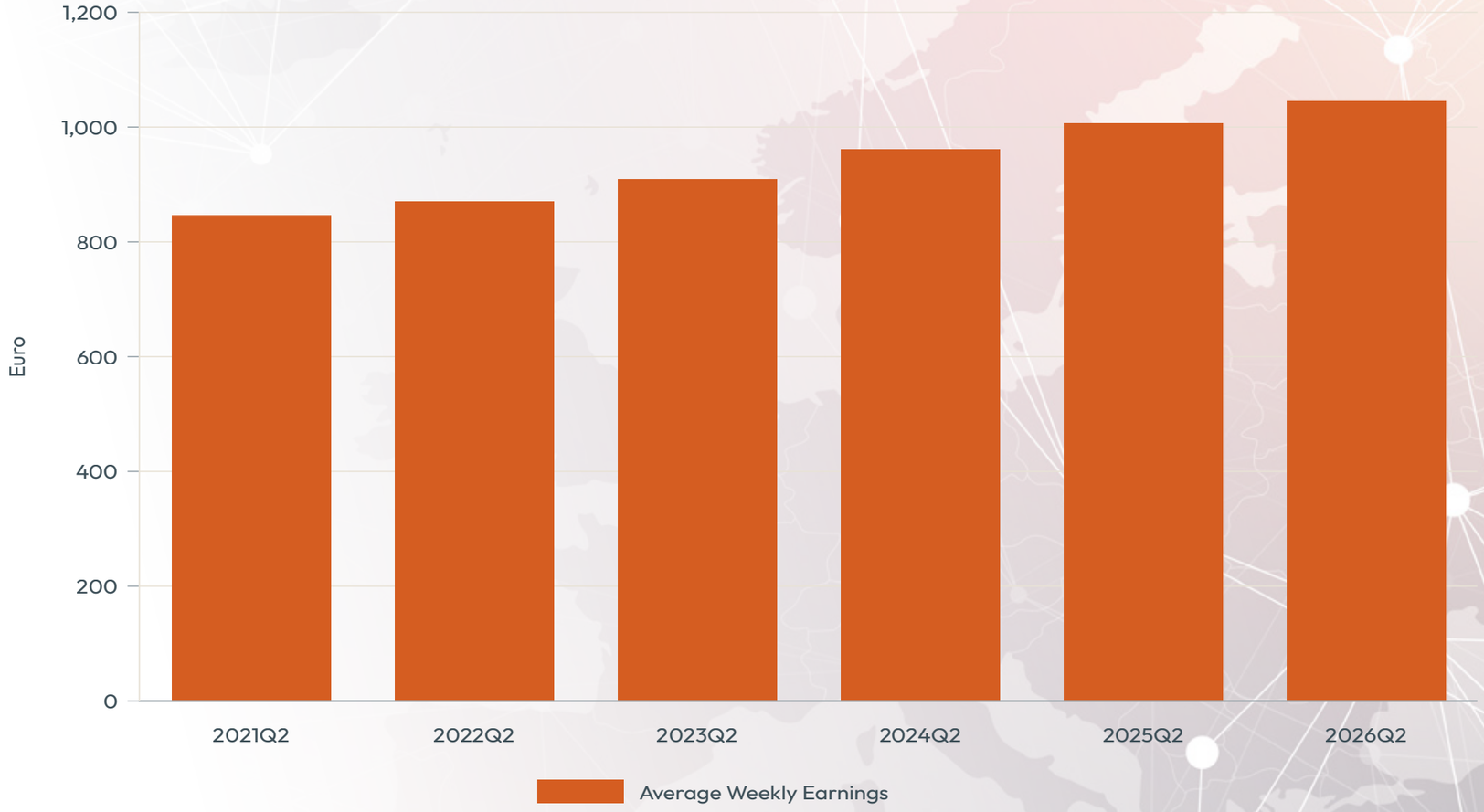
Ireland presents a different picture. The unemployment rate edged up to 4.8 percent in October 2026 from a revised 4.7 percent in September.[30] Wage growth remains healthy: average weekly earnings reached €1,046.88 in the second quarter of 2026, 3.9 percent higher than a year earlier. The overall job vacancy rate stood at 1.3 percent, unchanged year over year, although vacancy pressure continues to vary considerably by sector. Information and communications, for example, recorded a vacancy rate of 1.6 percent and the highest average hourly total labor cost of any major sector, at €61.40.[30,31] Ireland continues to use economic migration to help close these gaps, updating its Critical Skills Occupations List in May to address shortages in areas including ICT, health, production management, and other specialized roles.[32] At the same time, the cost threshold for bringing in international talent has increased: since March 2026, the general minimum salary for a General Employment Permit is €36,605, while the primary Critical Skills threshold increased to €40,904.[33]

Compliance pressure in Ireland is increasingly centered on something different: visibility into how work is valued and paid. Employers with 50 or more employees are now required to report gender pay gap information through Ireland's centralized Gender Pay Gap Portal.[34] Meanwhile, Ireland missed the EU's June 7 deadline for fully transposing the Pay Transparency Directive, with the government continuing to develop legislation covering the remaining provisions.[35] The delay should not be read as a reason to postpone preparations or any behind-the-scenes work needed to align structures across different HR and procurement systems. The Directive substantially raises expectations around pre-employment pay information, objective and gender-neutral pay structures, workers' access to pay information, and remediation

of unexplained pay gaps. For employers, preparation increasingly means cleaning up job architecture before it becomes a reporting problem, aligning job families, titles, levels, rate ranges, and objective compensation criteria, and making sure information can move reliably across HR systems and external labor programs.

The UK and Ireland therefore illustrate two different approaches to stronger workforce governance. In the UK, accountability is broadening across the labor supply chain, with contracting parties increasingly sharing responsibility for compliance and more obligations falling on end-user clients as well as the suppliers and intermediaries that engage workers. Ireland, by contrast, is pushing pay transparency inward, into the architecture used to classify jobs, determine pay, and assess work of equal value. For multinational employers, both developments point to the need for a more connected approach to workforce governance. Permanent employees, agency workers, independent talent, and outsourced services may still require different engagement models, but the systems used to understand who is working, how they are paid, and where accountability sits can no longer operate in separate silos.

Average weekly earnings in Ireland, Q2 2021 to Q2 2026[36]



AgileOne's Take: UK and Ireland

Accountability is moving deeper into workforce operations, but stronger governance can also make flexible talent easier to use with confidence. Clients have an opportunity to connect supplier due diligence, tax-chain visibility, worker-type governance, and job and pay architecture across employee and external talent populations. An integrated MSP and talent strategy can help preserve workforce flexibility while creating clearer visibility into suppliers, rates, engagement models, and accountability.

THE NETHERLANDS

The Dutch labor market is beginning to look more balanced on paper after several years of extraordinary tightness. In September 2026, unemployment stood at 4.0 percent, representing approximately 408,000 people, up from 393,000 in June.[37] At the end of the third quarter, employers reported approximately 375,000 seasonally adjusted vacancies, virtually unchanged from the previous quarter, while GDP expanded by 0.6 percent quarter over quarter, following revised growth of 0.7 percent in the second quarter.[38] Wage pressure is also cooling, although it remains substantial: collectively negotiated hourly wages, including special remuneration, were 4.0 percent higher year over year in August, continuing the slowdown from earlier in the year.[39]

More than 2,300 employment agencies employed approximately 407,000 agency workers in 2024.

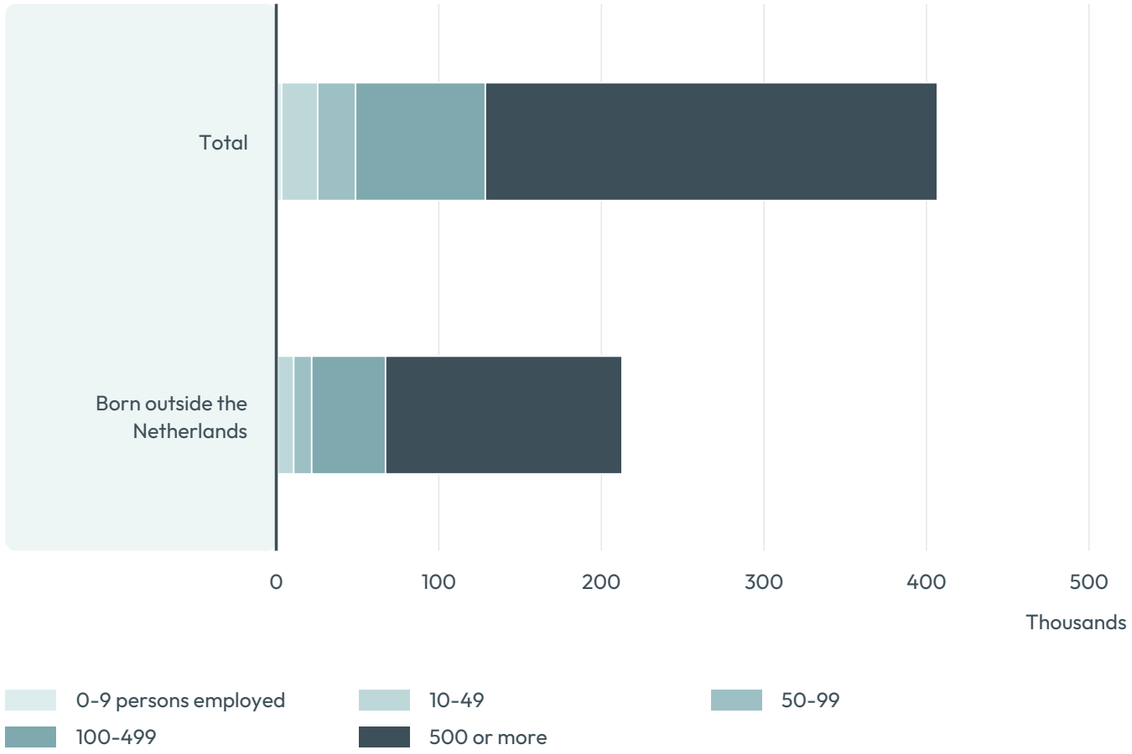
Temporary labor provides an especially revealing view into how that market functions. More than 2,300 employment agencies employed approximately 407,000 agency workers in 2024. More than half — 52.4 percent — of those workers were born outside the Netherlands.[40] Meanwhile, 20.3 percent of jobs at temporary employment agencies were paid at the statutory minimum wage in 2025, compared with 6.7 percent across the economy as a whole.[41] Flexible labor has therefore become closely intertwined with migration, lower-wage work, and the sectors most dependent on quickly deployable labor. That helps explain why the Dutch government is treating staffing market regulation as a structural labor market issue rather than a narrow concern for staffing firms.

The most significant change is the Wet toelating terbeschikkingstelling van arbeidskrachten, or WTTA. The law takes effect January 1, 2027, and establishes a formal admission system for organizations supplying workers to other companies. Enforcement begins January 1, 2028, after which hirers generally may only obtain workers from suppliers admitted or exempted by the Nederlandse Autoriteit Uitleenmarkt. The transition process begins much



sooner: registration is open through December 31, 2026, with formal admission applications opening in 2027.[43] For companies, that makes the remainder of 2026 an important preparation period. Supplier inventories, contractual structures, ownership relationships, existing certifications, and the distinction between genuine services procurement and labor supply all deserve review well before enforcement begins.

Jobs done by temporary workers, by size of employment agency, 2024[42]



Flexible work rules are tightening in parallel. In July 2026, the Dutch Senate approved the Flexible Workers (Increased Security) Act, which eliminates traditional zero-hours contracts in favor of more bounded arrangements, strengthens equal working-condition protections for agency workers, and shortens the period during which temporary agency relationships can operate under the least secure conditions. The law also makes it harder to cycle repeatedly through fixed-term employment without establishing greater employment security.[44] These reforms do not signal the end of flexible work in the Netherlands. They signal a move toward more deliberate flexibility, where the reason for using external labor, the employment conditions attached to it, and the provider through which it is sourced all matter more.

For employers, this changes the economics of workforce planning. Flexible talent will remain essential in a country where specialized shortages persist, and migrant workers play an outsized role in staffing critical industries. But external labor should increasingly be deployed because it is strategically appropriate — not simply because it appears administratively easier than direct employment. Programs that segment work clearly among employees, compliant contingent labor, and genuinely outcome-based services will be better positioned for the Dutch market that is taking shape.

AgileOne's Take: The Netherlands

The Netherlands is not eliminating workforce flexibility; it is raising the standard for how flexibility is delivered. The WTTA transition creates an opportunity to rationalize supplier networks, validate providers, and decide more deliberately where contingent labor versus outcome-based services belongs. MSP governance and stronger SOW/services procurement can help organizations preserve access to scarce skills while adapting to tighter staffing-market requirements.

GERMANY, AUSTRIA, AND SWITZERLAND (DACH) REGION

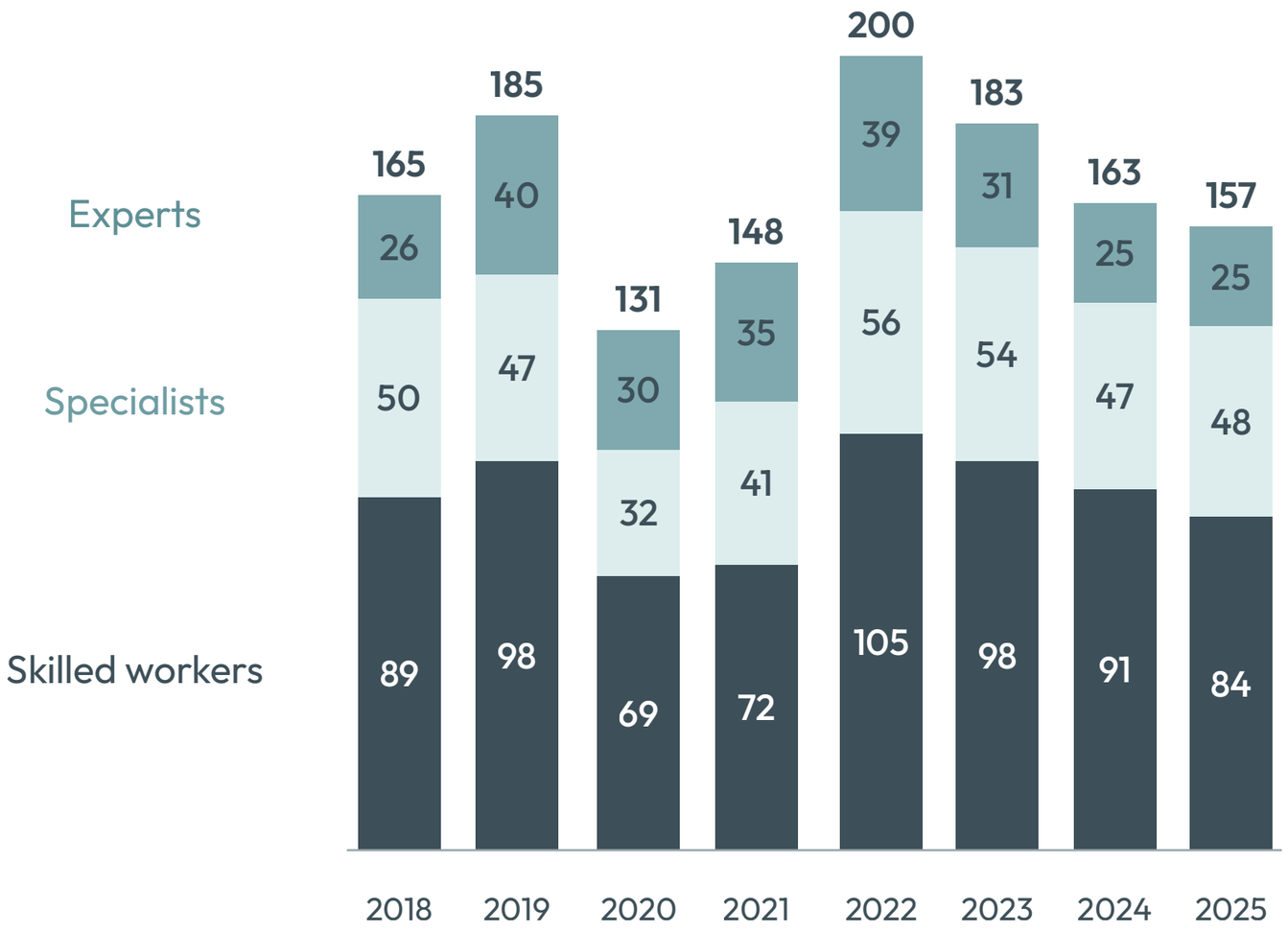
The DACH labor story has shifted considerably from the straightforward talent scarcity narrative of recent years. Germany, in particular, now looks loose and tight at the same time. Registered unemployment climbed above three million in July 2026 before easing to 2.955 million in October, with a registered unemployment rate of 6.3 percent. Using the internationally comparable ILO measure, unemployment was considerably lower at 4.1 percent in September. Employment has also softened: approximately 45.60 million German residents were employed in September, 211,000 fewer than a year earlier.[45] Yet employers still reported 654,000 registered vacancies in October, underscoring the continued mismatch between available workers and hiring needs.[46]

Germany does not simply have too few or too many workers; it has a persistent mismatch between the capabilities employers need and the labor that is readily available.

Germany does not simply have too few or too many workers; it has a persistent mismatch between the capabilities employers need and the labor that is readily available. A subdued economy adds another layer. Preliminary figures show GDP grew 0.2 percent quarter over quarter in the third quarter of 2026, with consumption increasing slightly while investment declined and export momentum weakened.[47] Yet industrial conditions remain uneven: production rose 0.7 percent month over month in September, following a revised 1.0 percent increase in August, but third-quarter production remained 0.4 percent below the second quarter.[48] For manufacturers and other industrial employers, this creates an unusual planning environment: pressure to control headcount and costs in the near term exists alongside long-term demand for technical capabilities needed for automation, infrastructure, electrification, and industrial modernization.



Number of occupations facing worker shortages in Germany, by skill level[49]



Source: Federal Employment Agency (Bundesagentur für Arbeit)

Regulation is also reaching further into how project-based work is procured. Germany's new Bundestariftreuegesetz, or Federal Collective Bargaining Compliance Act, took effect May 1, 2026. For covered federal construction and service contracts and concessions generally valued at €50,000 or more, contractors must make a commitment to provide workers assigned to the project with applicable collectively bargained standards. These can include compensation, leave, maximum working hours, minimum rest periods, and breaks once the relevant sector-specific regulations are issued.[50] Importantly, the law is already in force even though the detailed sector regulations that will establish the applicable terms are still being developed. For companies participating in public infrastructure, energy, construction, technology, or other federally procured work, labor standards therefore become part of the commercial architecture of the engagement, rather than something considered only after a supplier is selected.

Germany's long-standing scrutiny of independent work creates a second governance challenge, particularly for technology, engineering, consulting, and professional services talent. Calling someone an independent contractor does not by itself make the relationship independent. German social insurance authorities assess how the engagement actually operates, including whether the individual functions as an entrepreneur or is instead integrated into and dependent on the organization in a manner characteristic of an employee. Germany's formal status determination process can be used before work begins, including for recurring groups of similar engagements and arrangements involving a third party.[51] For organizations using highly specialized freelancers or consultant populations at scale, this creates a strong case for designing the engagement first and sourcing the worker second: scope, supervision, deliverables, integration with internal teams, and commercial risk all need to support the intended model.



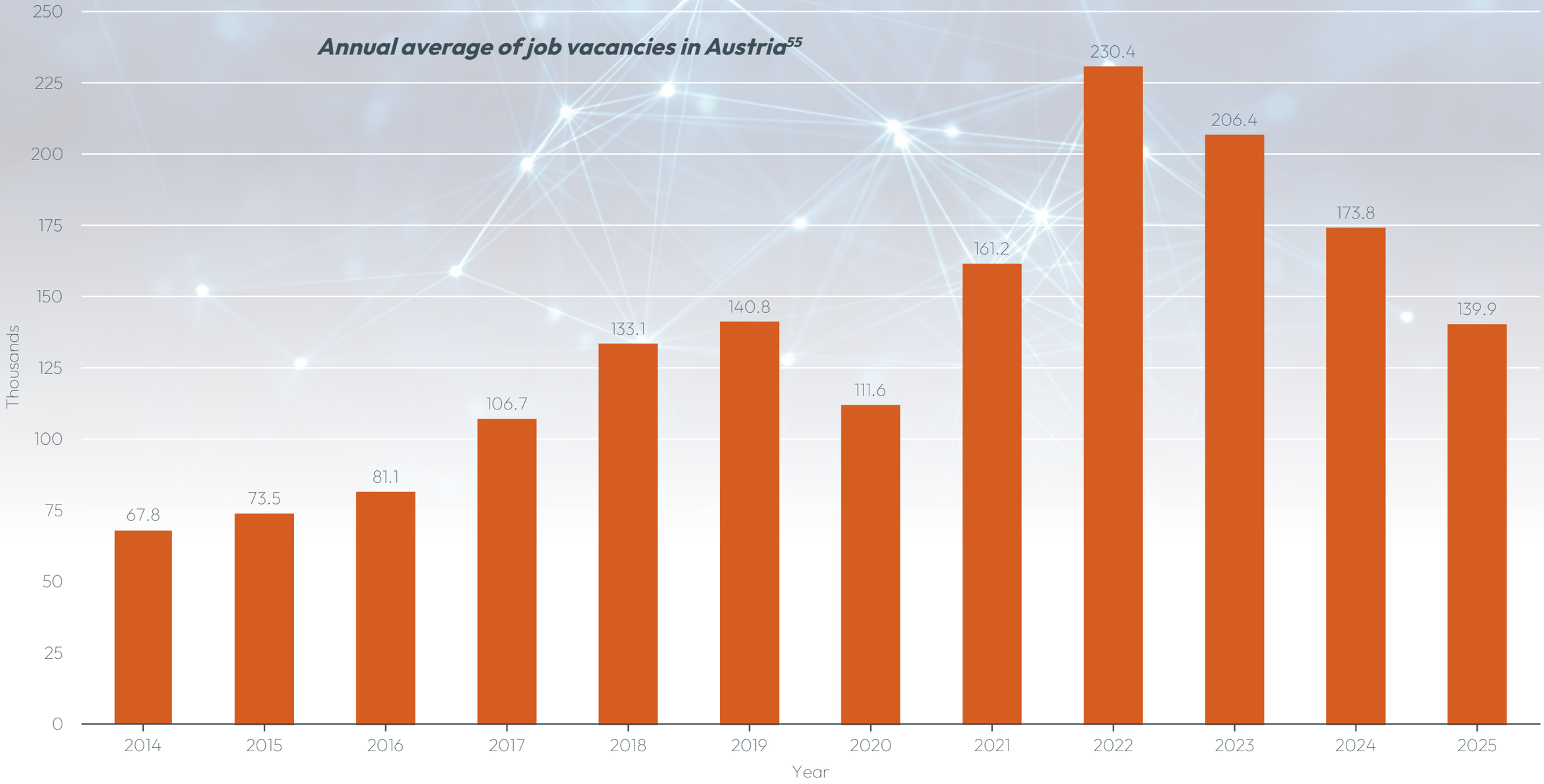
The wider DACH region is also cooling, although not uniformly. In Austria, registered unemployment rose to 314,499 in October, 1.3 percent higher than a year earlier, while the national registered unemployment rate increased to 7.3 percent.[52] Austrian employers reported an average of approximately 121,900 vacancies in the third quarter, down 11.8 percent from a year earlier.[55] Switzerland remains substantially tighter, while its economic outlook has recently improved. In September, the federal government's expert group raised its 2026 GDP growth forecast to 1.7 percent from the 0.9 percent projected in June, following unexpectedly strong second-quarter growth.[54] The result is a region in which employers may have somewhat greater leverage than they did at the height of the labor shortage, but access to specific skills remains highly uneven by country, occupation, and industry.

For global employers, treating DACH as a single sourcing market is therefore increasingly difficult. Softer headline demand may create new opportunities to recruit, particularly where restructuring releases experienced workers into the market. But workforce models still have to contend with local rules around employment status, collective labor standards, external talent, and worker protections. The most effective regional programs will combine centralized visibility, such as common data, supplier governance, and clear rules for choosing an engagement model, with enough local flexibility to account for how differently Germany, Austria, and Switzerland regulate and supply talent. In a slower market, that discipline can be an advantage: organizations have more room to design the workforce they need rather than simply racing to fill every open role. That creates an opening to reassess not only where talent is sourced, but whether permanent hiring, independent specialists, contingent labor, or outcome-based services are best suited to the work.

AgileOne's Take: DACH Region

Softer labor markets may create a window to access experienced talent that was difficult to reach at the height of the shortage, but opportunity varies sharply by country and skill. Clients should pair regional talent intelligence and broader sourcing with disciplined country-specific engagement rules for independent specialists, externally supplied talent, and services work. Direct sourcing, preferred supplier strategies, and structured SOW management can help capture newly available skills without sacrificing local control.

Annual average of job vacancies in Austria[55]




INDIA
OVERVIEW

INDIA OVERVIEW

India combines enormous labor market scale with one of the most significant regulatory resets in decades. The government made four Labour Codes effective on November 21, 2025, consolidating 29 central labor laws into the Code on Wages, the Industrial Relations Code, the Code on Social Security, and the Occupational Safety, Health and Working Conditions Code. The strategic intent is dual: simplify compliance and improve ease of doing business while expanding and modernizing worker protections.[56]

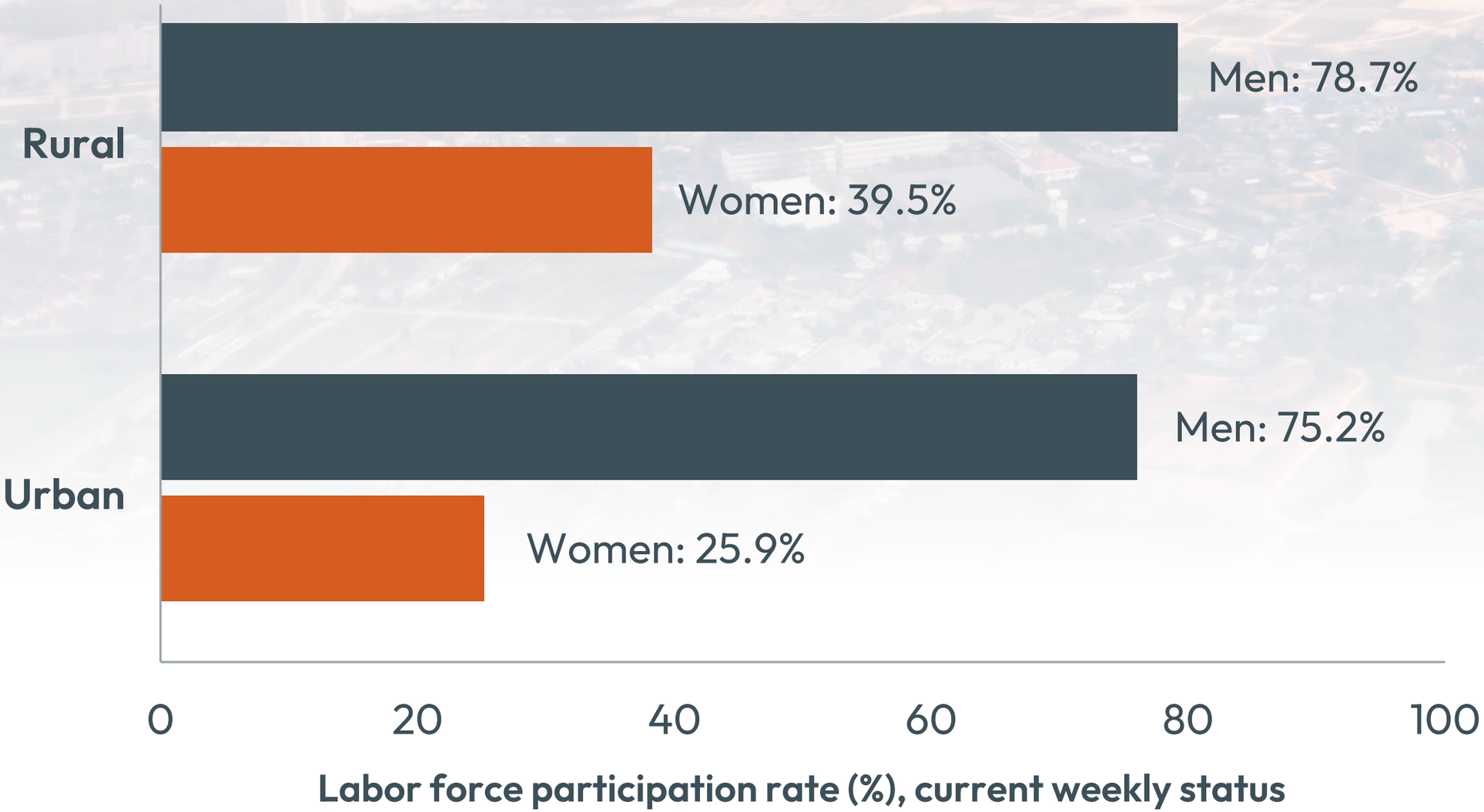
For multinational employers, the opportunity is not simply low-cost labor; it is access to deep technology, engineering, analytics, operations, and increasingly high-value global capability center talent, provided the sourcing model reaches beyond the most saturated hubs.

The labor market itself remains defined by participation and scale. India's Periodic Labour Force Survey reported a labor force participation rate of 55.7 percent for people age 15 and older in October 2026, while the worker-population ratio increased to 53.0 percent. The overall unemployment rate stood at 4.9 percent. Participation continues to vary sharply across groups and geographies: rural labor force participation reached 58.4 percent compared with 50.5 percent in urban areas, while female labor force participation rose year over year to 35.0 percent nationally.[57] These differences reinforce the importance of looking beyond national averages when assessing accessible talent supply.

The labor codes matter directly to workforce composition. The new framework broadens social security concepts to include gig and platform workers, standardizes wage definitions, strengthens requirements for appointment letters and workplace safety, and creates a more unified compliance architecture.[58] For organizations using contractors, the Occupational Safety, Health and Working Conditions Code also sharpens the importance of understanding where contract labor is deployed, including restrictions around contract labor in core activities subject to statutory exceptions.[59]



Labor Force Participation Rate by Geography and Gender, October 2026 [60]



Note: Each rate is calculated as a share of its respective population group aged 15 and older (for example, rural women in the labor force as a share of all rural women aged 15 and older). The rates are not parts of a single total and should not be added together.

For manufacturing, energy, and life sciences, the reform can increase the value of disciplined contractor governance because these sectors often combine permanent workforces with large project, maintenance, construction, technical service, and specialist populations. A centralized view of worker type, worksite, contractor, wage components, statutory benefits, and scope becomes essential. For technology employers and global capability centers, the most important opportunity may be a more deliberate mix of permanent talent, project specialists, and geographically distributed teams as competition intensifies in Bengaluru, Hyderabad, Pune, Chennai, and other established hubs. For workforce leaders, the opportunity is to manage those channels as a portfolio rather than as separate talent programs.

India is also an important test of workforce inclusion. The scale of the working-age population does not automatically translate into accessible supply, particularly for women and for specialized skills. Employers that invest in skills-based hiring, returnship pathways, flexible work arrangements, and partnerships outside Tier 1 talent clusters can increase effective labor supply while supporting retention. The compliance modernization should therefore be seen not only as a cost and process issue, but as an opportunity to build a more formal, visible, and scalable workforce model.

AgileOne's Take: India

Modernization, scale, and regulatory evolution create both complexity and a significant talent opportunity. Clients should use the new labor codes as a trigger to rationalize contractor data and supplier controls while expanding access to talent beyond established Tier 1 hubs. RPO and direct sourcing can widen access to permanent and specialist talent, while MSP governance can provide greater visibility across large contractor and project-based populations.



INDIA AT A GLANCE

55.7%

Labor force participation rate, people age 15 and older, October 2026

53.0%

Worker-population ratio, October 2026

4.9%

Overall unemployment rate October 2026

29 → 4

Central labor laws consolidated into four Labour Codes, effective November 21, 2025



What This Means for Workforce Strategy

India's labor-market scale becomes more valuable when sourcing moves beyond the most competitive hubs. A portfolio approach combining permanent hiring, specialist talent, flexible work, and geographically distributed teams can expand effective supply while reducing concentration risk.

Sources: Periodic Labour Force Survey (PLFS) Monthly Bulletin, October 2026, Ministry of Statistics and Programme Implementation; Four Labour Codes, Press Information Bureau, Government of India, November 21, 2025



LATIN AMERICA OVERVIEW



LATIN AMERICA OVERVIEW

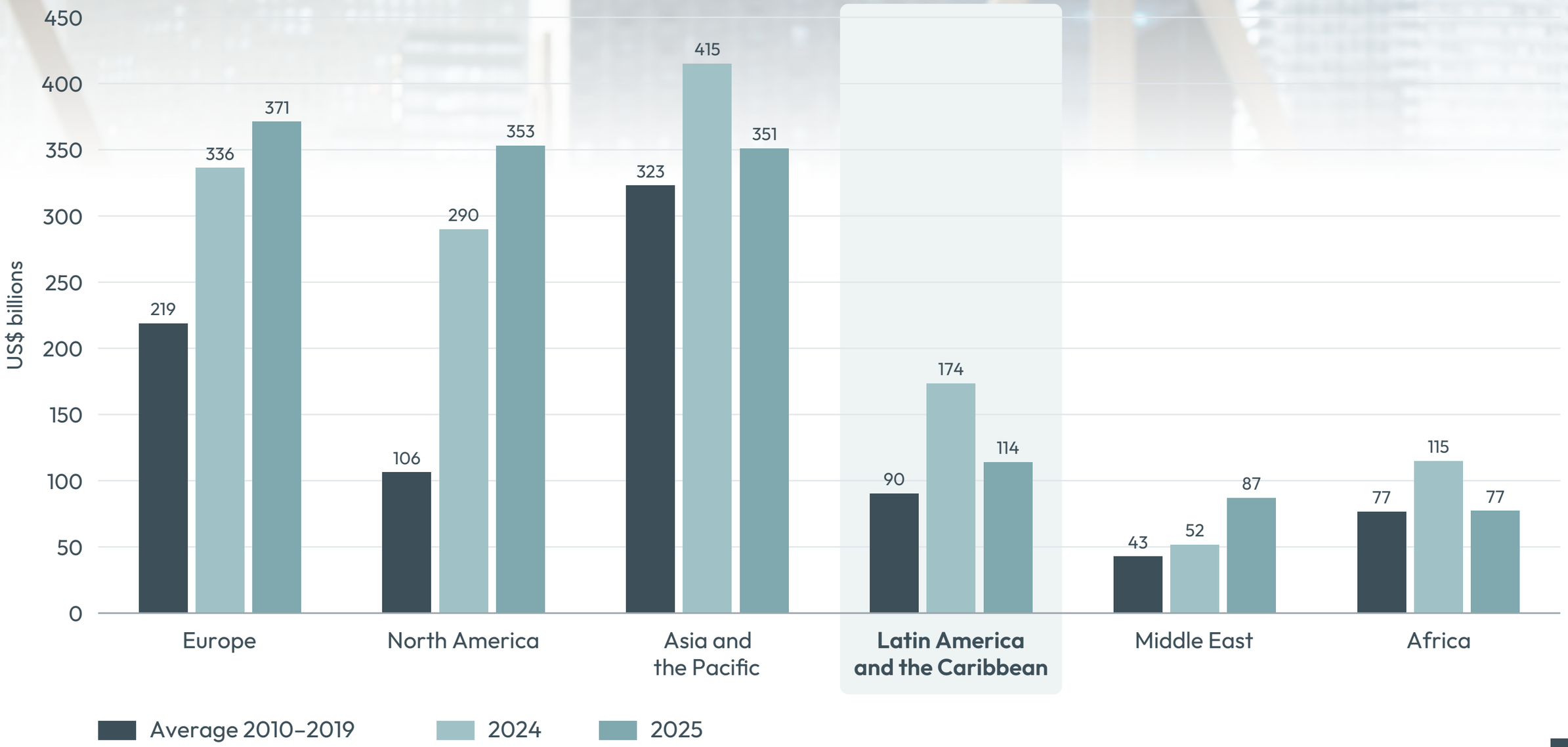
Latin America approaches the end of 2026 with stable but modest growth, despite a persistent divide between formal and informal work. The Economic Commission for Latin America and the Caribbean (ECLAC) projects regional GDP growth of 2.0 percent in 2026, with most economies decelerating and employment growth remaining relatively subdued.[61] The region therefore offers meaningful talent potential without the broad overheating seen in some post-pandemic markets, but employers still have to navigate productivity gaps, social protection differences, and uneven labor market formalization.

Brazil is the clearest example of this duality. In the third quarter of 2026, unemployment stood at 5.2 percent, the lowest rate for a third quarter since Brazil's Continuous National Household Sample Survey (PNAD Contínua) series began in 2012, while the employed population reached a record 103.6 million. At the same time, the informality rate stood at 37.5 percent, representing approximately 38.8 million informal workers.[63] Strong headline employment can therefore coexist with a large share of workers outside conventional formal employment. For multinational organizations, that creates both an opportunity to bring workers into more stable formal roles and a need for careful local payroll, benefits, classification, and vendor governance.

Against this global backdrop, the value of FDI projects announced in Latin America and the Caribbean declined from $174 billion in 2024 to $114 billion in 2025, underscoring the region's uneven investment climate.

Digital work is one pathway toward higher-value formalization. Technology, shared services, financial services, analytics, and AI-related roles continue to expand across major markets, and nearshoring remains attractive for employers seeking time-zone alignment. Yet the region is also exposed to automation in administrative and routine cognitive work. The practical response is not to avoid digital roles, but to build training and progression around AI-enabled workflows so that productivity gains translate into higher-value work rather than simply labor substitution.

World: FDI project announcements by destination region (US$ billions)[62]



Brazil's legislative agenda reinforces the importance of workforce design. Constitutional Amendment 141, promulgated on October 16, 2026, provides for the phased elimination of the six-day workweek and a reduction in the maximum working week from 44 to 40 hours, without a reduction in pay. Beginning in December 2026, covered workers will be entitled to two paid weekly rest days and a maximum 42-hour workweek; the 40-hour limit follows in December 2027. These changes will affect shift scheduling, overtime, staffing models, and project timelines in sectors such as retail, logistics, manufacturing, and services.[64] Meanwhile, a new paternity leave law, effective January 2027, expands the prior five-day entitlement in stages to 10 days in 2027 and 15 days in 2028. The law also provides for a further increase to 20 days beginning in 2029, subject to a fiscal-target requirement, and establishes a new social security benefit and employer reimbursement mechanism.[65] These developments are consistent with a wider regional movement toward stronger worker protections and reduced working time.

Brazil also demonstrates why Latin America cannot be treated as a single labor market. Employment law, payroll, benefits, union structures, contractor rules, and local practices differ materially by country. Regional visibility is valuable, but local validation remains indispensable.

AgileOne's Take: Latin America

Brazil and the wider region offer meaningful sourcing and nearshoring potential, particularly for organizations looking to diversify talent locations and add flexible capacity. The opportunity is strongest when regional sourcing is paired with country-level employment validation, formal workforce pathways, and disciplined supplier governance. AgileOne can help clients build scalable sourcing and contingent-workforce strategies while adapting the model to local employment, payroll, and contractor requirements.



TOP SOLUTIONS

The market is asking for a different definition of workforce agility: not simply more contingent labor, but the ability to route work to the right talent model with the right controls.

The strongest workforce strategies will be able to move work across permanent employees, contingent labor, direct-sourced talent, service providers, and AI-enabled workflows across locations. That's where AgileOne comes in. We help clients orchestrate the full ecosystem, deciding how work should get done, then creating the sourcing, technology, supplier, data, and compliance architecture to make that choice operational.

Most organizations are already running several workforce models at once. The question is whether that mix has been deliberately designed or simply accumulated over time. In a more regulated labor market, agility comes from knowing the rules well enough to move with confidence. Here are eight priorities for building a more adaptable workforce strategy in 2027:

1. BUILD WORKFORCE AGILITY AROUND ORCHESTRATION, NOT HEADCOUNT SUBSTITUTION

In a market where demand can cool nationally while remaining acute in specific skills, companies need a portfolio of workforce options. MSP and contingent programs remain essential for variable demand, backfills, seasonal work, specialized skills, and rapid capacity. But the strategic upgrade is to connect those programs to permanent hiring, SOW, direct sourcing, and internal mobility so managers are not choosing a worker type by habit. A structured intake process should ask questions such as: What outcome is needed and for how long? How much supervision is required? Can the work move geographically? What compliance constraints apply? The answers should determine the model used, not the other way around.



2. MAKE COMPLIANCE A DESIGN LAYER INSIDE MSP AND CONTINGENT PROGRAMS

The new regulatory environment increases the value of a well-governed MSP. Supplier onboarding should extend beyond insurance and rate cards to legal-entity verification, licensing, financial health, payroll practices, subcontracting, worker classification, data handling, and use of AI. Country and state rules should be translated into requisition-level guardrails wherever possible, so compliance occurs in the workflow rather than after an audit. Examples include location-specific pay transparency fields, worker tenure thresholds, approved umbrella providers, prohibited supplier chains, and escalation for roles that blur the boundary between staff augmentation and SOW.

3. USE DIRECT SOURCING TO TURN TRANSPARENCY INTO AN ADVANTAGE

Direct sourcing can do more than reduce agency markups. A curated talent community creates a controlled channel through which clients can consistently communicate pay ranges, assignment conditions, worker expectations, and candidate data practices. It also helps organizations maintain relationships with known former contractors, retirees, alumni, silver-medalist candidates, and niche skill communities. In markets where immigration or local supply is constrained, direct sourcing can expand reach while keeping the employer brand and program rules visible. The model works best when it is integrated with an MSP so candidates, rates, classification, and supplier-of-record processes remain governed.

4. STRENGTHEN SOW AND SERVICES PROCUREMENT AS A DISTINCT OPERATING MODEL

As business transformation continues, companies will keep buying outcomes from service providers. The risk is allowing SOW to become an unmanaged label for individual labor. Strong services procurement separates deliverable-based work from staff augmentation, establishes milestone and acceptance criteria, confirms provider control over delivery, and creates visibility into spend and subcontracting. Where compliance exposure is elevated, that visibility may also need to extend to material subcontracting and other downstream delivery arrangements.

5. ESTABLISH AN AI GOVERNANCE LAYER FOR TALENT TECHNOLOGY

Companies need a workforce-specific AI inventory that crosses HR, procurement, IT, legal, and suppliers. Each tool should be mapped to the decisions it informs (sourcing, ranking, assessment, interview, scheduling, performance, rate setting, and redeployment) and assigned an accountable owner. Governance should include vendor diligence, data provenance, bias and outcome testing where appropriate, human review, candidate/worker notice, documentation, and change control when models or features are updated. The program should be risk-based: a chatbot that answers FAQs is not the same as a system that ranks applicants or recommends termination.

6. BUILD ONE WORKFORCE DATA MODEL ACROSS WORKER TYPES

Build a shared workforce data model that defines core fields such as job architecture, skills, worker type, location, supplier, rate or pay, tenure, engagement owner, and risk flags consistently across HR, procurement, and supplier systems. HR and procurement should jointly own these definitions, with legal, compliance, and IT supporting local requirements and system integration. Put the model into practice through standardized intake processes, supplier reporting requirements, routine data-quality checks, and dashboards that identify classification inconsistencies, missing information, and emerging compliance risks. The goal is not to consolidate everything into a single technology platform, but to establish reliable workforce visibility and clear accountability across the organization.



7. SHIFT FROM “TALENT POOLS” TO CRITICAL-SKILL ECOSYSTEMS

National labor market averages are becoming less useful than skill and location intelligence. For critical roles in energy/utilities, technology, manufacturing, and life sciences, clients should identify the skills most exposed to retirement, migration constraints, geographic concentration, or rapid technology change, then build multiple access paths. Look into internal upskilling, direct sourcing, preferred suppliers, university or technical school partnerships, alternative locations, and project-based specialists. Rate intelligence should be paired with time-to-fill, availability, attrition, and quality metrics so procurement does not mistake a low rate for an accessible market.

8. TREAT LOCAL VALIDATION AS PART OF GLOBAL GOVERNANCE

The most mature global workforce program is not the one with the fewest local exceptions. It is the one that knows which decisions should be global, and which must be local. Core policy, supplier standards, data definitions, worker-type logic, and governance can be standardized. Legal implementation, employment terms, works council or union requirements, payroll, benefits, licensing, and country-specific labor practices require local review. This is particularly important in Europe, India, and Latin America, where implementation details can move quickly even when the policy direction is clear.



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