

The agency work
market

2017

On the way to work

1,2 mln

Over **1.2 million people** found employment through the employment agencies in Poland - it's **1%** more than in the previous period.

The number of people who found a job thanks to services of employment agencies

1 219 139

temporary work

795 779

recruitment

274 725

recruitment for foreign employers

148 635

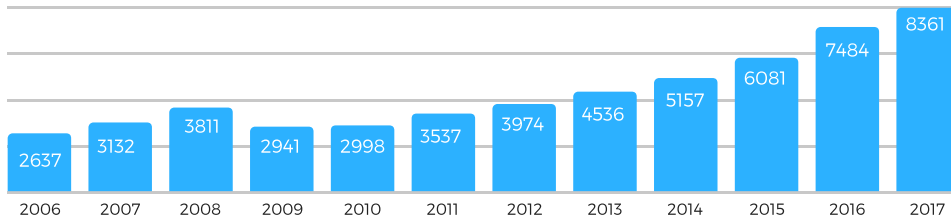
Every year agencies around the world support in employment nearly **56.5 million people**.



The structure of the agency work market

In 2017, there were **8361** employment agencies operating on the market. This is **12%** more than in the previous year.

Number of employment agencies in Poland in 2006 - 2017



Legal form of activity

- 42%** private limited company
- 37%** natural person
- 21%** others

The value of the agency work market in Poland

In 2017 the total revenue of Polish HR Forum (PFHR) member companies amounted to

PLN 4 billion



temporary work **90%**

PLN 7.3 billion

The total revenue of the Polish agency work market in 2017 increased by 6% and is estimated at PLN 7.3 billion

TOP 10 in PFHR

Randstad
Adecco
Manpower
Trenkwalder
OTTO Work Force
Gi Group
Job Impuls
Grupa Aterima
Grafton
People



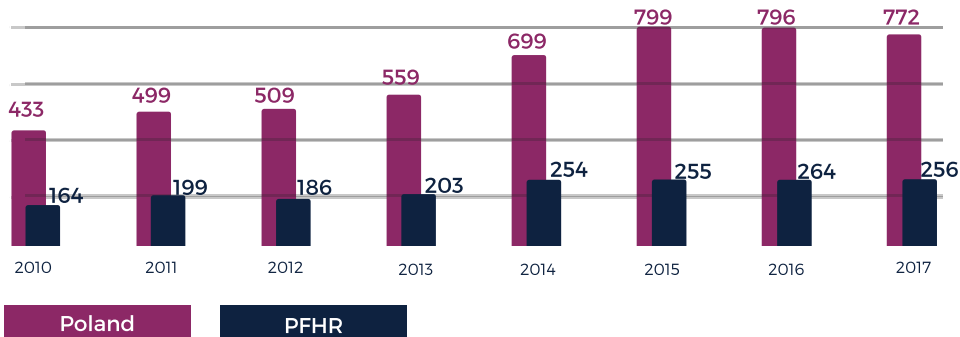
Temporary employment

Temporary workers



The number of temporary workers decreased by 3% last year: PFHR member companies employed **256 486 people** in 2017 (estimated data for the entire market is around **772 000 people**)

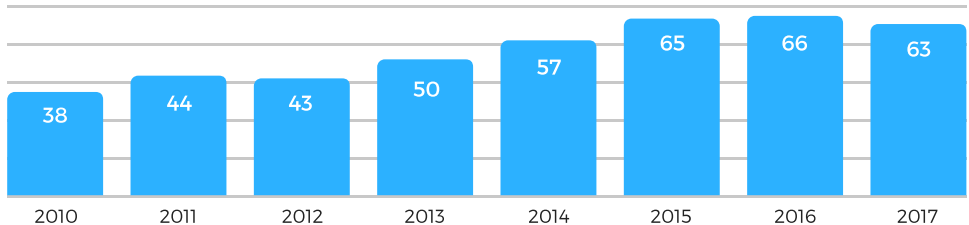
Number of temporary workers in Poland in 2010 - 2017



Number of worked hours

Within the members of the Polish HR Forum, the number of hours worked has **decreased of 5%**. Full-time equivalent reached the level of 66 thous. in 2016 and in 2017 only **63 thous.**

FTE within PFHR members 2010 - 2017 (in thous.)

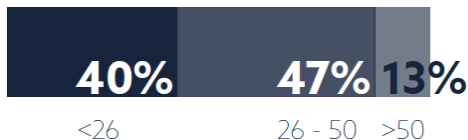


Temporary workers

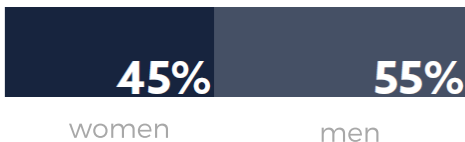


The unchanging characteristic of the Polish temporary work market is high percentage of employment of young people up to 26 years of age and women. Interestingly, a group of temporary employees over 50 years of age has grown for another year in a row - accounts now for 13% of all temporary employees (11% in the previous year).

AGE

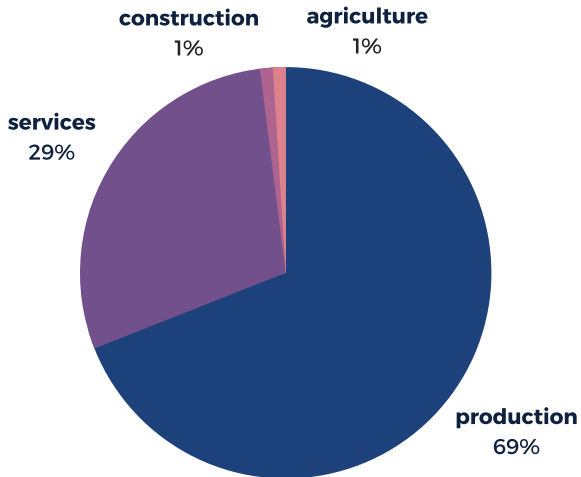


GENDER



Employment of temporary workers by sectors

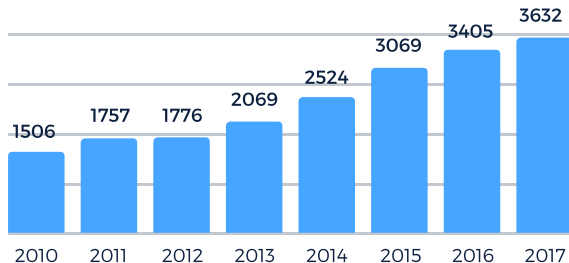
Every third employer user company in Poland cooperates with PFHR members. In 2017 our services benefited close to 5,000 companies.



Size of temporary work market

The PFHR agency's turnover in the temporary work service increased by 7%, reaching PLN 3,632 million. As both: the number of employees and FTE has dropped, the reasons for this should be seen mainly in growing level of remuneration of temporary workers. More and more temporary employees are employed in the service sector, on better paid positions.

Turnover on temporary work generated by PFHR agency in 2010 - 2017 (in PLN million)



Estimated value of temporary work market in Poland in 2017

PLN 6,6 billion



Recruitment

Recruitment market

Revenue generated of recruitment services by PFHR member companies in 2017 amounted to **PLN 144.3 million**.

Value of the recruitment market in PFHR (in PLN million) in 2017	144,3
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recruitment for the needs of Polish employers	128,6
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recruitment for the needs of foreign employers	15,7
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In recruitment for Polish employers member companies generated turnover PLN 129 million, which is 11% more than in the previous year. In 2017 agencies most often recruited for specialist positions. 51% of all completed projects concerned the services sector, 26% of the production sector.

Recruitment market



In the field of recruitment for foreign employers, PFHR member companies generated turnover at the level of nearly **16 million PLN**, **7%** more than in the previous year. 43% recruitment projects for foreign employers concerned the production sector.

Countries where the largest number of people were directed by agencies to work with foreign employers:

Netherlands	49%
Germany	23%
Cyprus	5%
Norway	4%
Austria	3%
Great Britain	2%
France	2%
Other	12%

Polskie Forum HR

The Polish HR Forum is the most influential employer organization representing the employment agency market. Since 2002 it has been working to build an effective labor market by promoting sustainable development of services in the area of widely understood human resources. Recognized social partner in Poland and Europe.

MEMBER COMPANIES

