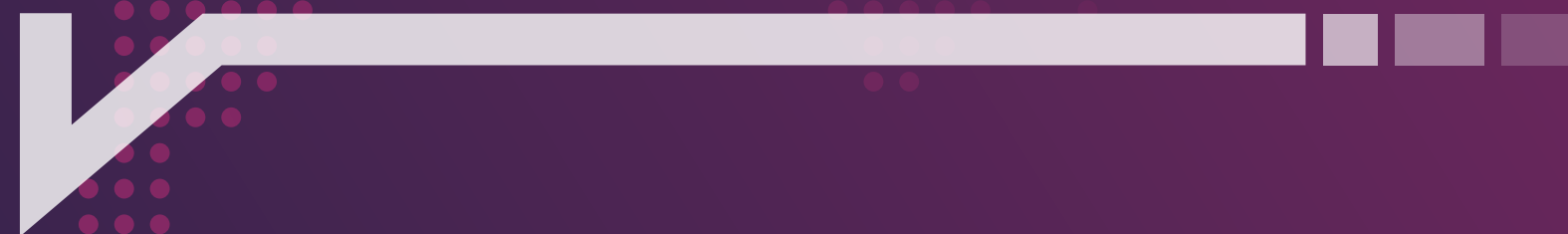


2019

The Agency Work Market



The agency work market 4

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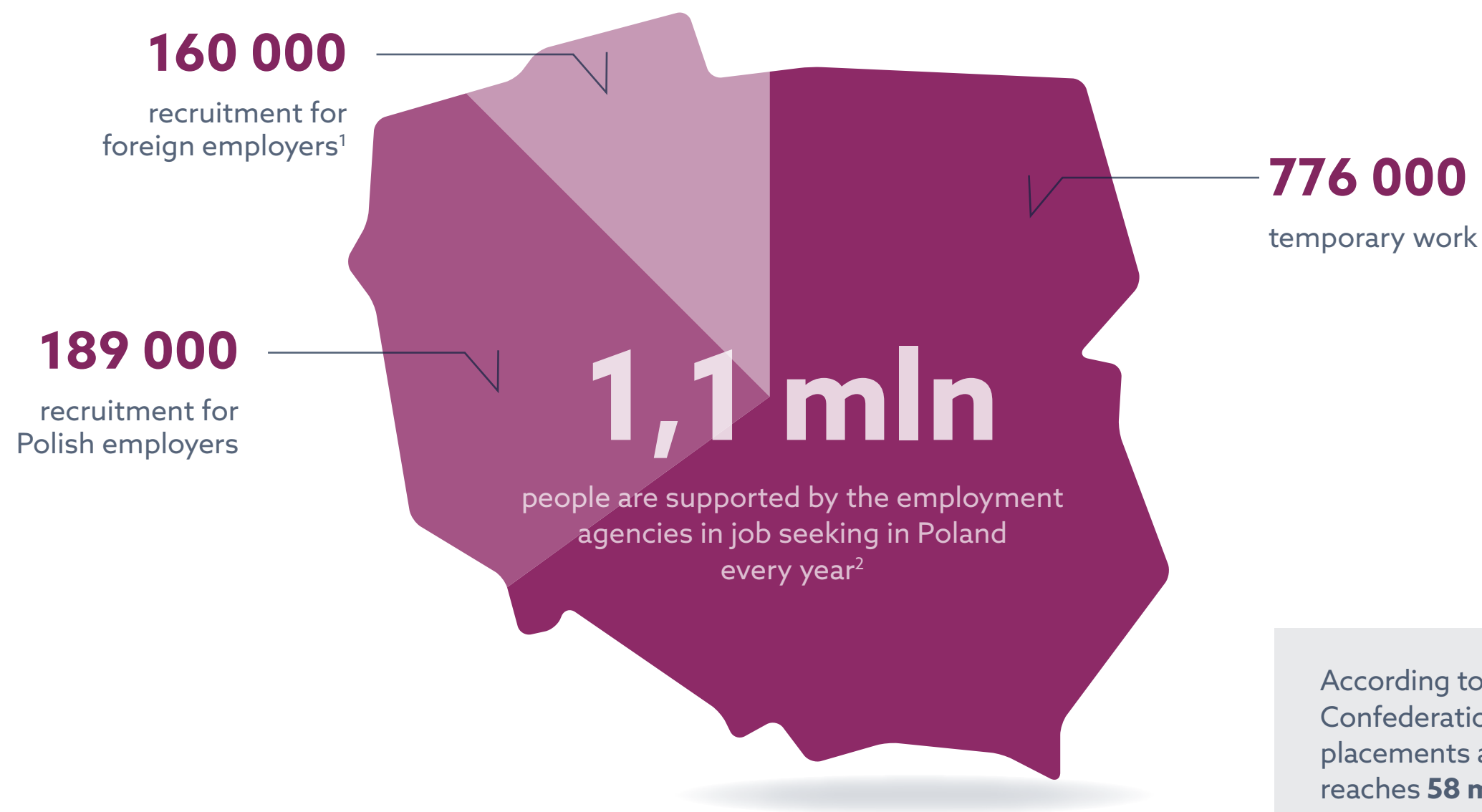
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1

The agency work market

The annual number of people who are supported
by the employment agencies in job seeking



¹ Informacja o działalności agencji zatrudnienia w 2018 roku, MRPiPS, 2019

² Informacja o działalności agencji zatrudnienia w 2018 roku, MRPiPS, 2019

³ Economic Report 2020 Edition, World Employment Confederation, 2020 r. (data for 2018 r.)

The structure of the work agency market

8761

number of employment
agencies in Poland in 2019

7423

job placement (recruitment),
personal counseling,
career guidance⁴

5130

temporary work

High rotation of entities on the market



2448

number of new agencies
registered in 2019



1882

number of agencies removed
from the register in 2019⁵

Each agency can provide services in both areas.

⁴ kraz.gov.pl

⁵ kraz.gov.pl

3,99 bn PLN

Total turnover of PFHR members in 2019.



2,7% DECREASE

7,25 bn PLN

Estimated value of the work agency market in Poland in 2019.

1,9% INCREASE

473 bn EUR⁶

Global market size according to WEC (in 2018).

⁶ Economic Report 2020 Edition, World Employment Confederation, 2020 r. (data for 2018 r.)

Ranking of the largest PFHR companies in 2019

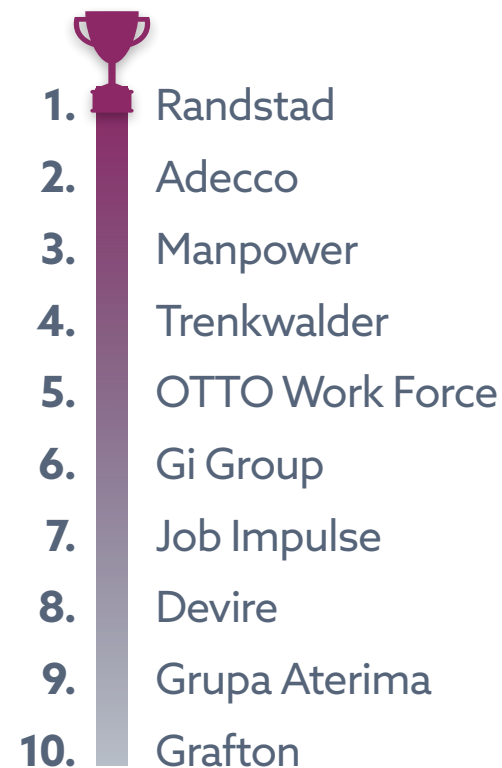
TOP 10

Total turnover



TOP 10

Agency work



TOP 10

Recruitment



Posting of workers



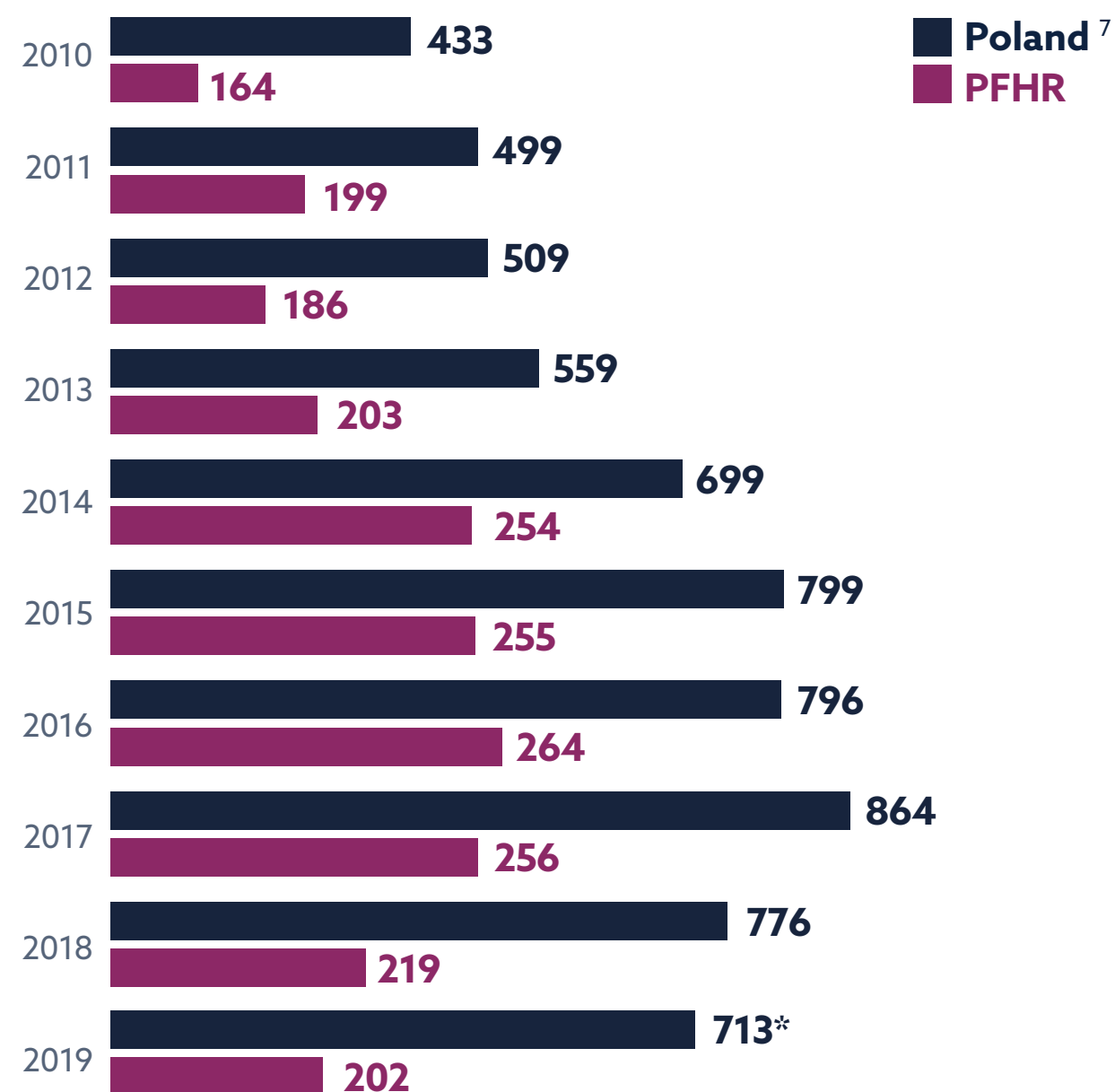
International recruitment



2

Agency work

Number of temporary workers in 2010-2019 (in thousands)



*estimated data



This situation is caused mainly due to the persisting employee market and, consequently, the growing number of temporary employees who find direct employment at an employer user company. The drop would be even bigger, if there wasn't a growing amount of workers from the third countries. In 2018, **35%** temporary workers were third-country nationals, of which **90%** were Ukrainians⁸.

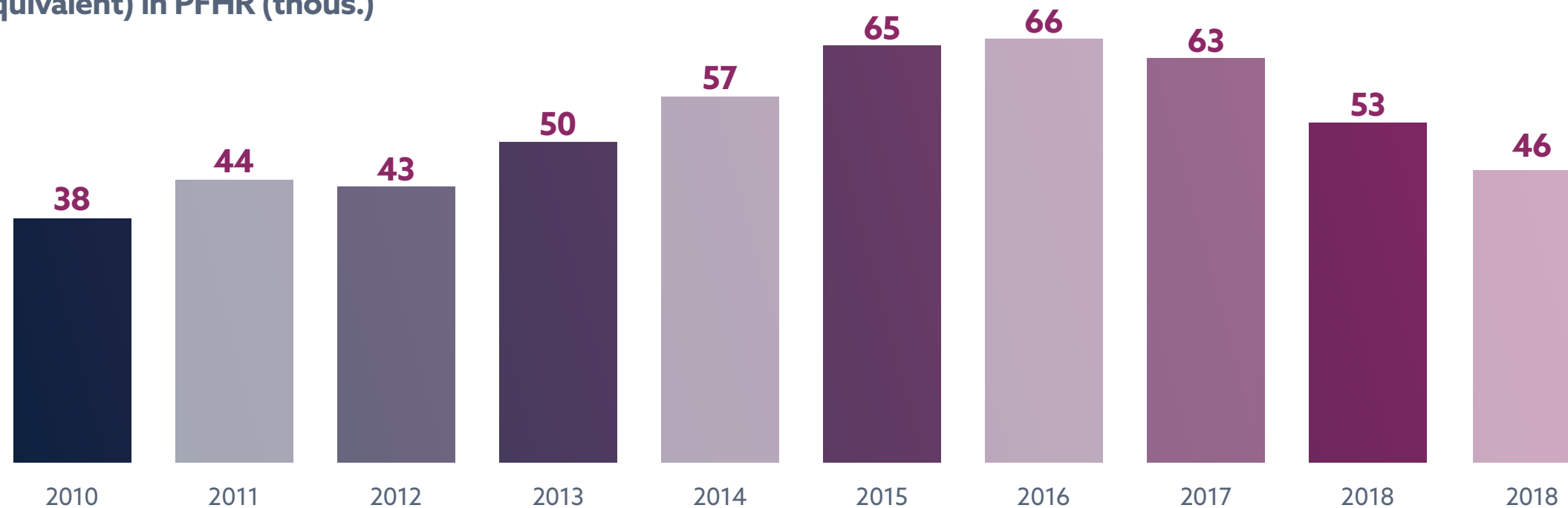
Over **88%** of temporary workers employed by PFHR member companies provide work on the basis of fix-term employment contracts. This percentage for the entire market was only **45%**⁹.

⁷ Informacja o działalności agencji zatrudnienia, MRPiPS, 2011–2018

⁸ Informacja o działalności agencji zatrudnienia w 2018 roku, MRPiPS, 2019

⁹ Informacja o działalności agencji zatrudnienia w 2018 roku, MRPiPS, 2019

FTE (full time equivalent) in PFHR (thous.)



14% DECREASE

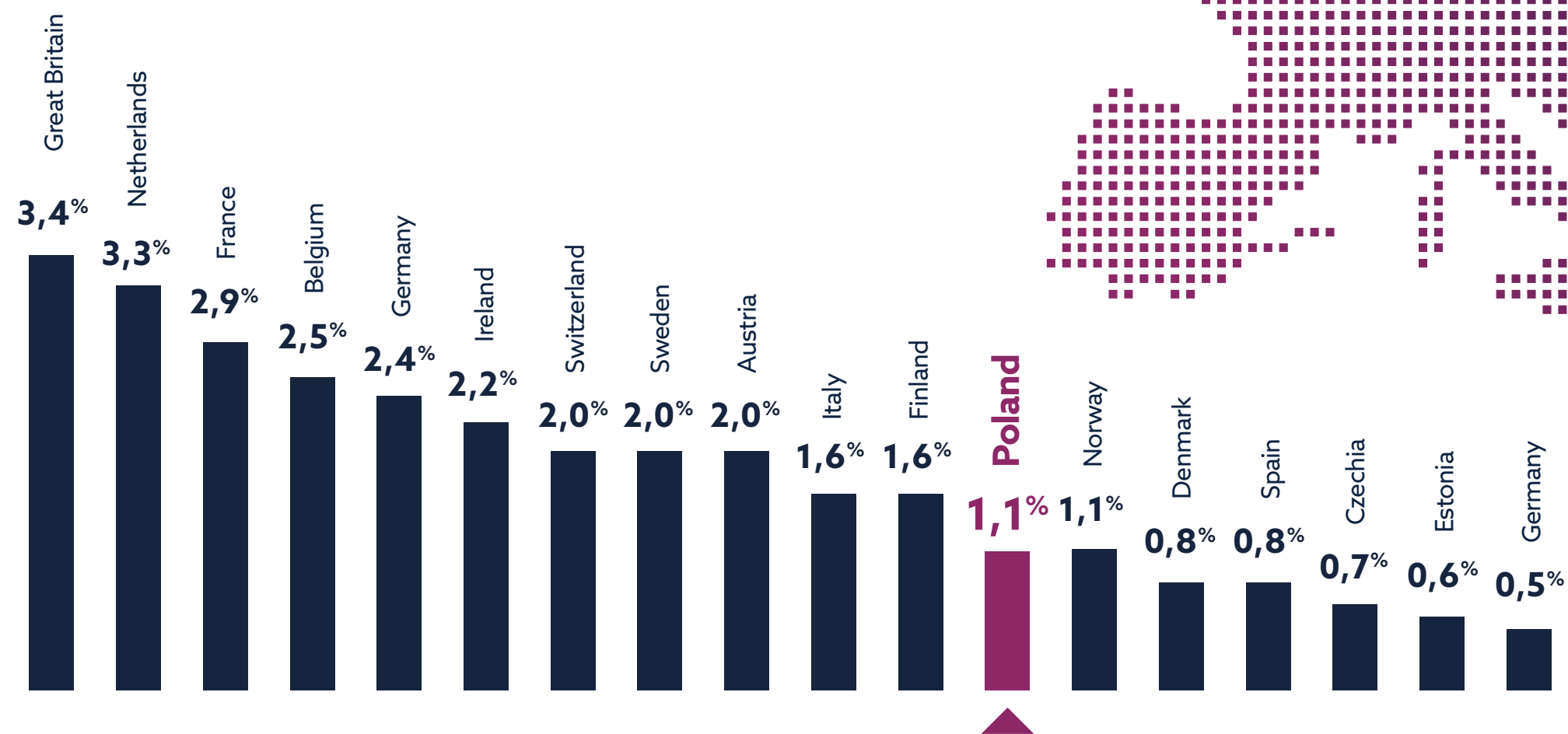
The number of worked hours (as well as their full-time equivalent) decreased 14 % year-to-year. The average period of the employment of temporary workers got shorter too, from 60 days in 2018 to 57 days in 2019. Similar data are provided by the Ministry of Labor and Social Policy: in 2018, 51% of temporary employees worked less than three months in total¹⁰.

Percentage of temporary workers with a total employment period



Source:
Informacja o działalności agencji
zatrudnienia w 2017 roku, MRPiPS, 2019 r.

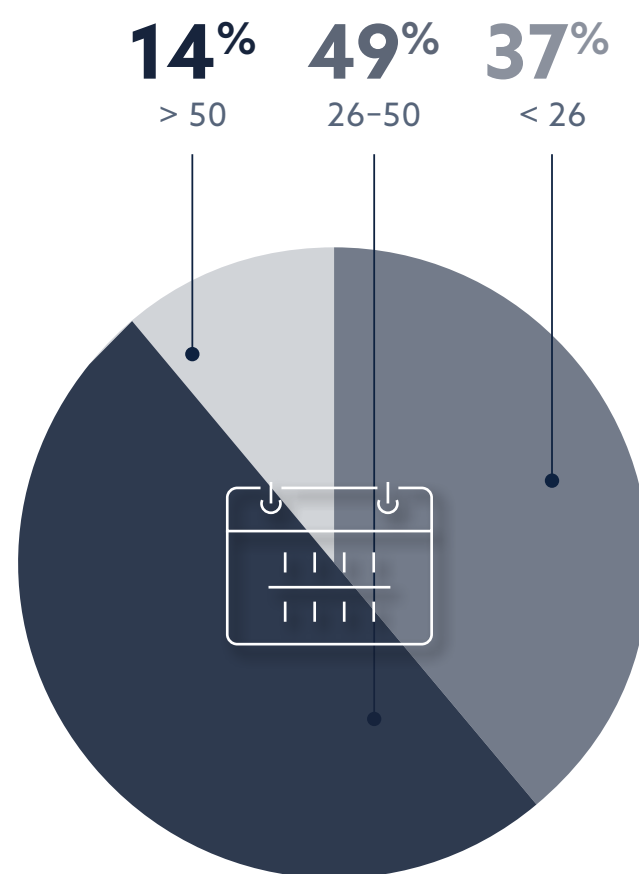
¹⁰ Informacja o działalności agencji zatrudnienia w 2018 roku, MRPiPS, 2019



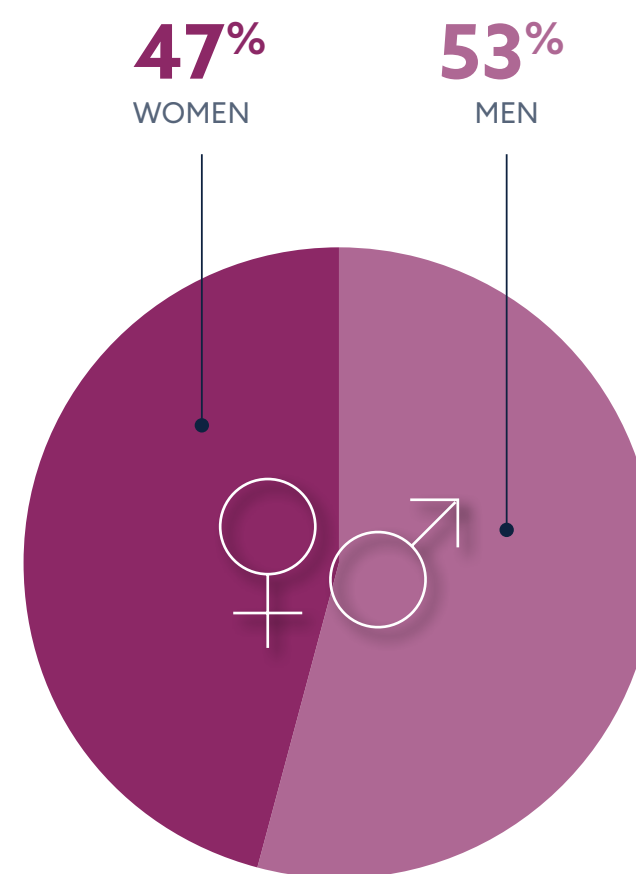
The penetration rate in Poland was about 1,1%. The european average is 2,1%, and the global is 1,6%¹¹.

¹¹ Economic Report 2020 Edition, World Employment Confederation, 2020 r.

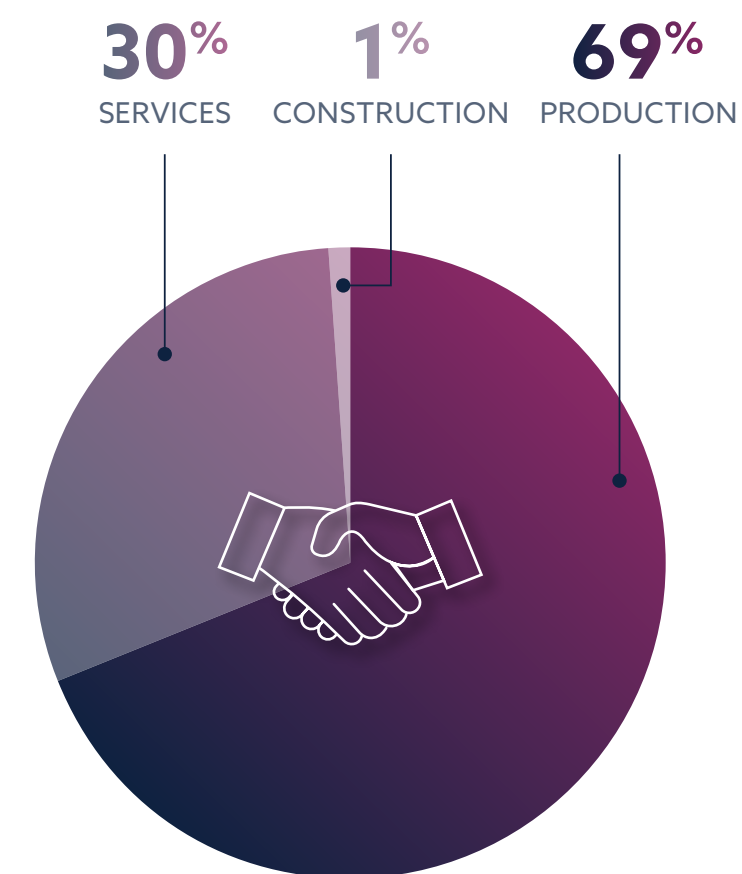
2 Temporary workers profile



AGE

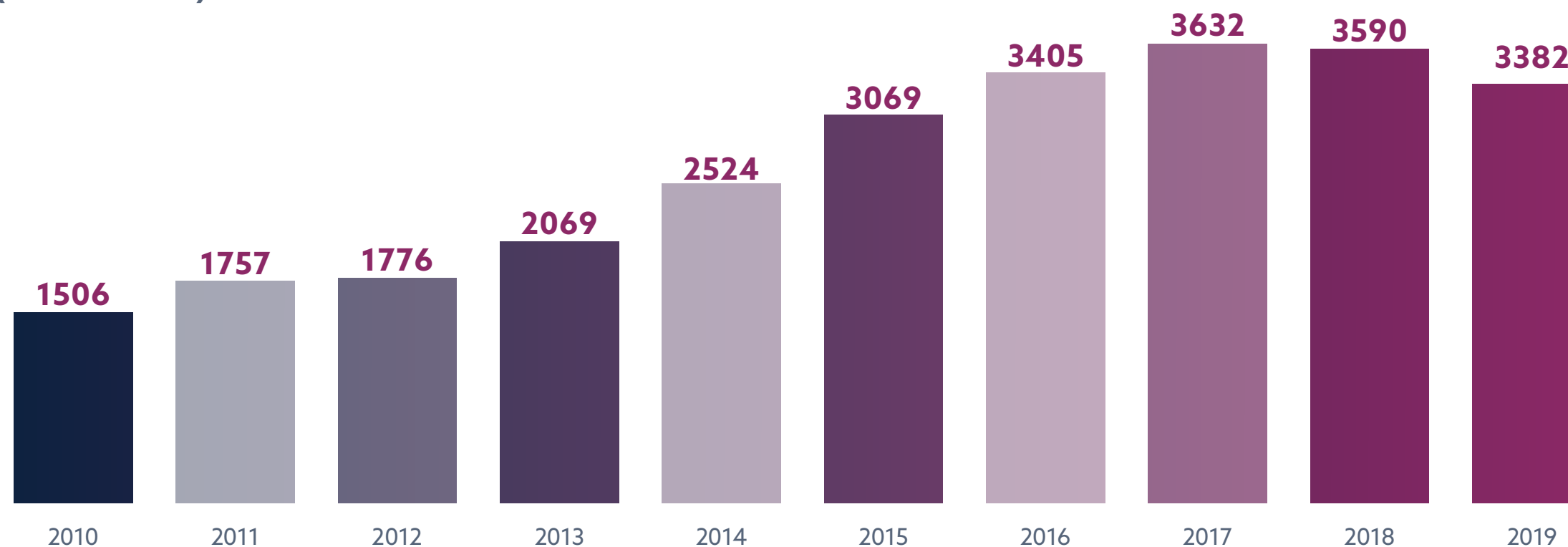


GENDER



EMPLOYMENT OF TEMPORARY
WORKERS IN SECTORS

Turnover of PFHR members in the field of temporary work
in 2011-2019 (in PLN million)



6% DECREASE

The turnover of the PFHR agency within
the temporary work service fell by 6% to
PLN 3 382 million.

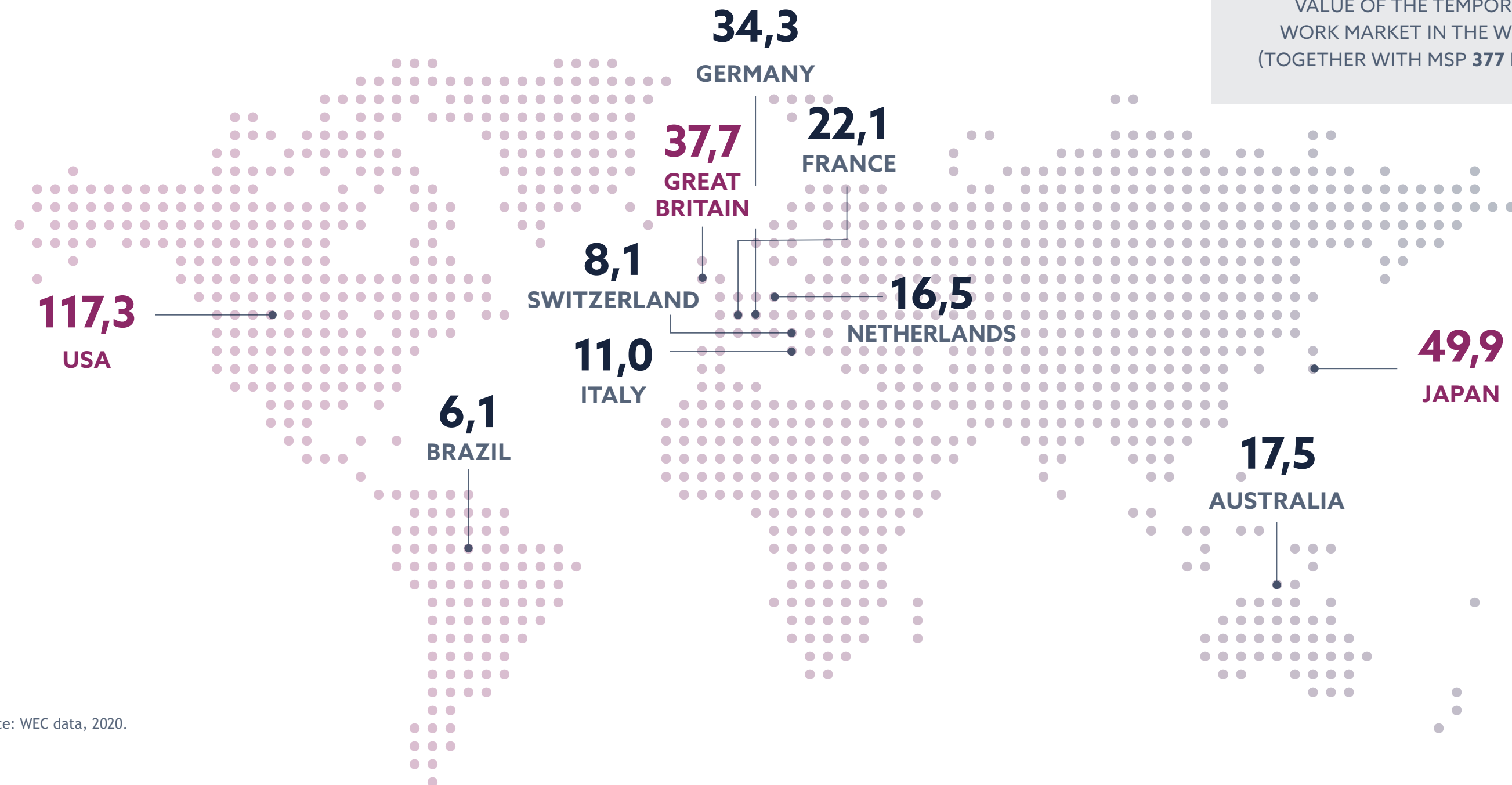
6,1 bn PLN

ESTIMATED VALUE OF POLISH
TEMPORARY WORK MARKET

Ranking of the 10 largest world markets in terms
of turnover rate (bn EUR)

284 bn EUR

VALUE OF THE TEMPORARY
WORK MARKET IN THE WORLD
(TOGETHER WITH MSP 377 BN EUR)

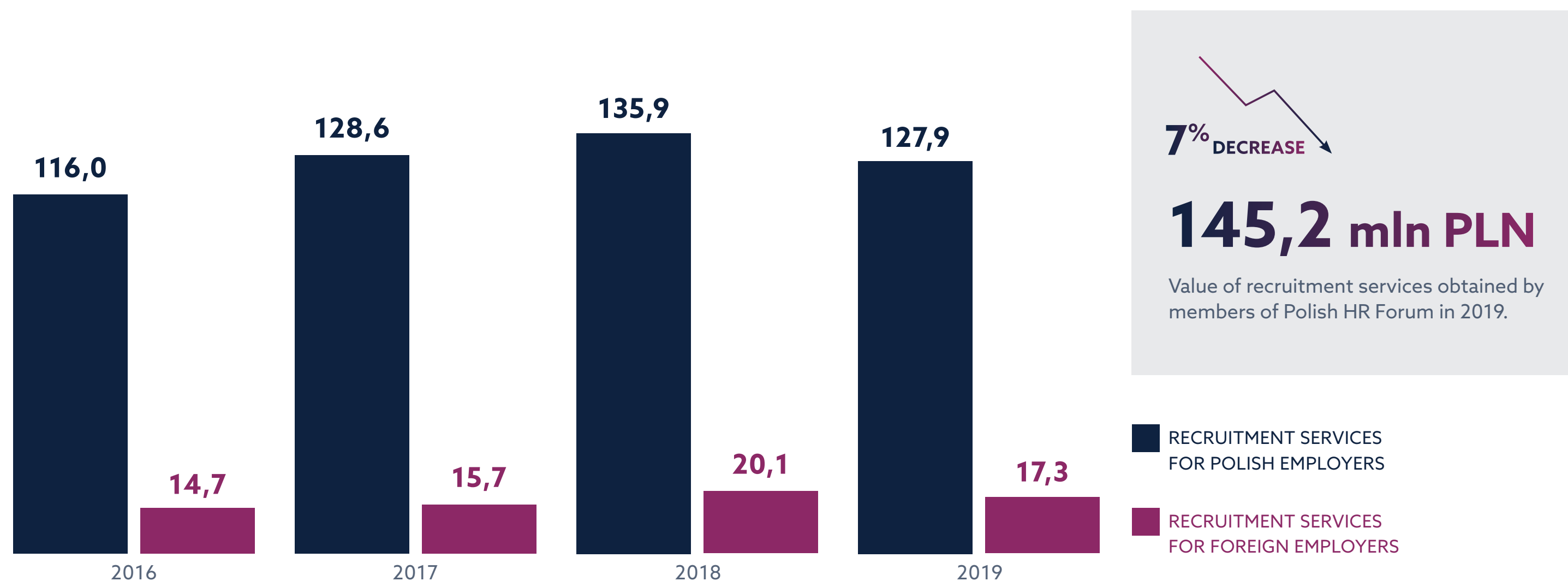



Source: WEC data, 2020.

3

Recruitment

Value of the recruitment services market in PFHR (mln PLN)



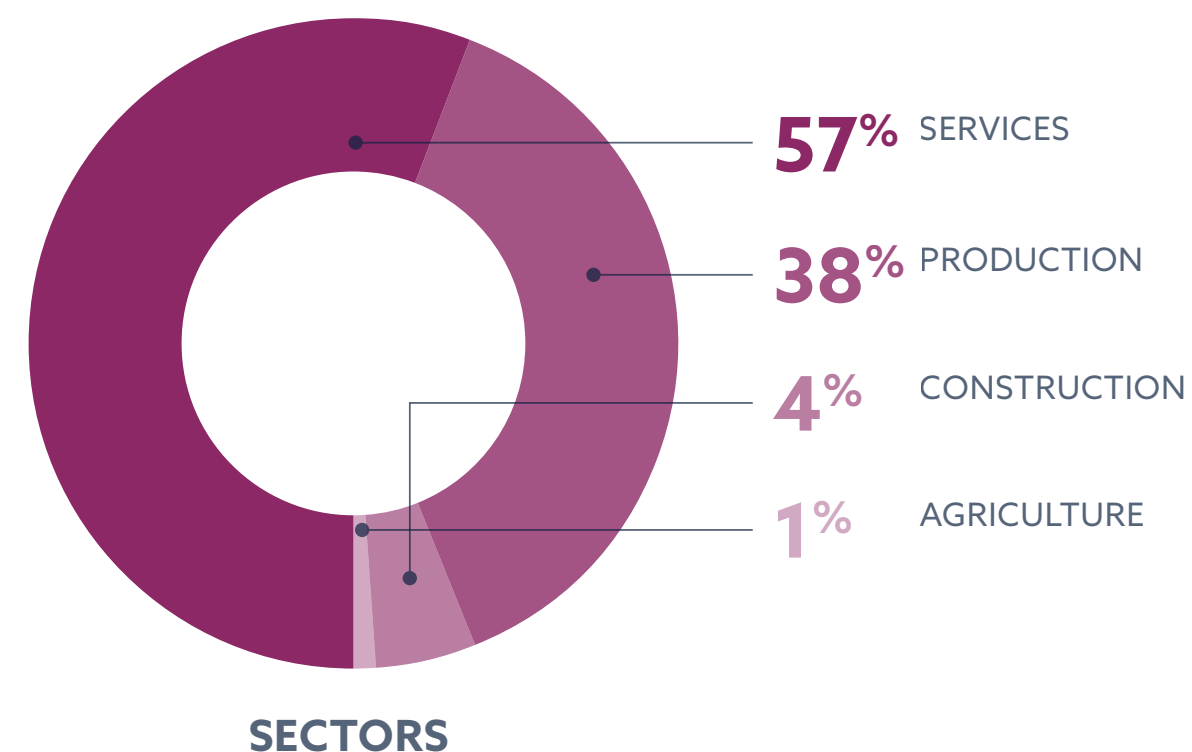
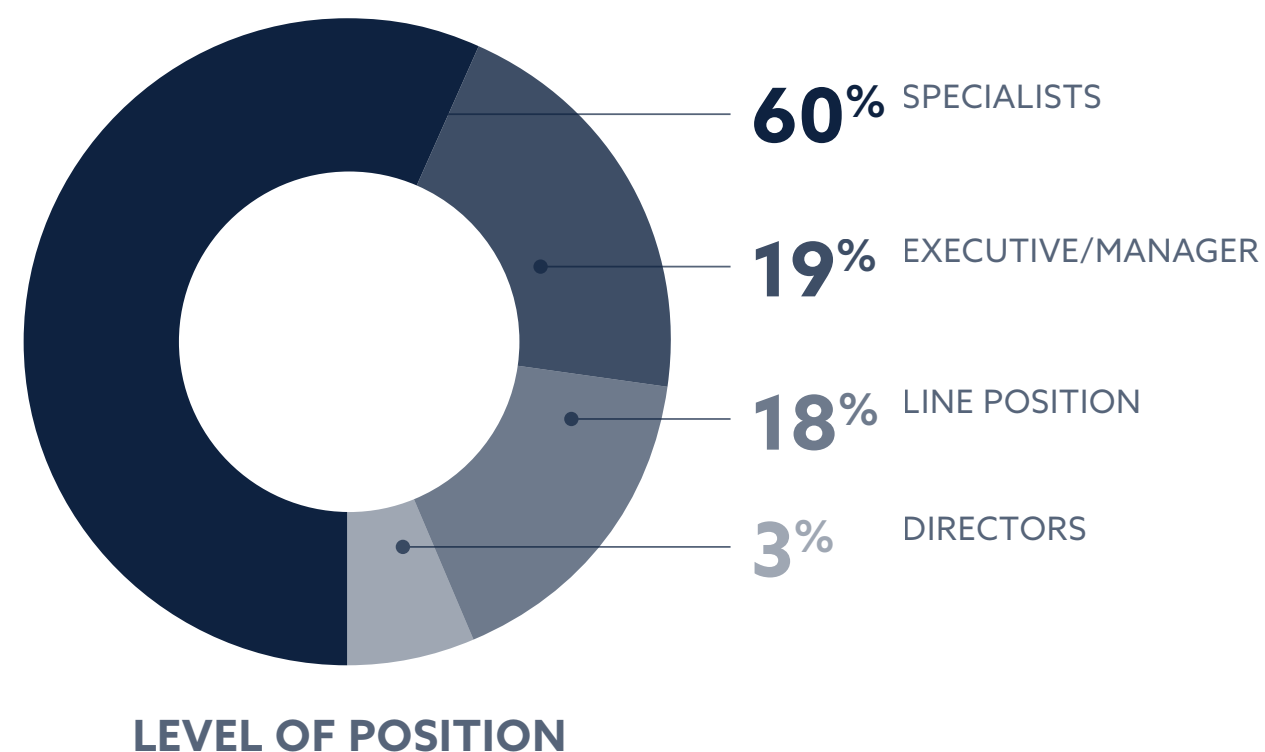


6% DECREASE

127,9 mln PLN

Value of recruitment services for Polish employers within PFHR members in 2019.

Most of the services were provided for specialist position and in the service sector.

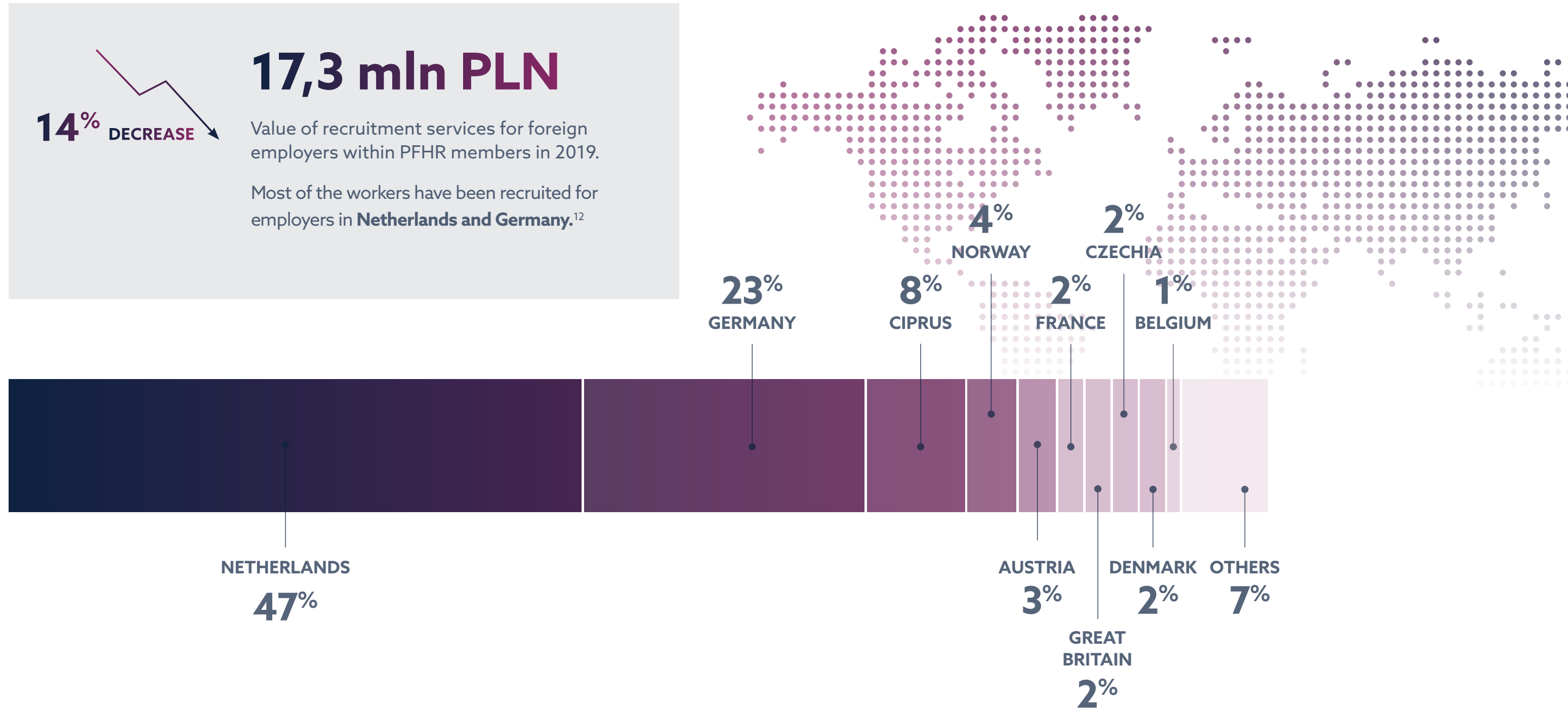


14% DECREASE

17,3 mln PLN

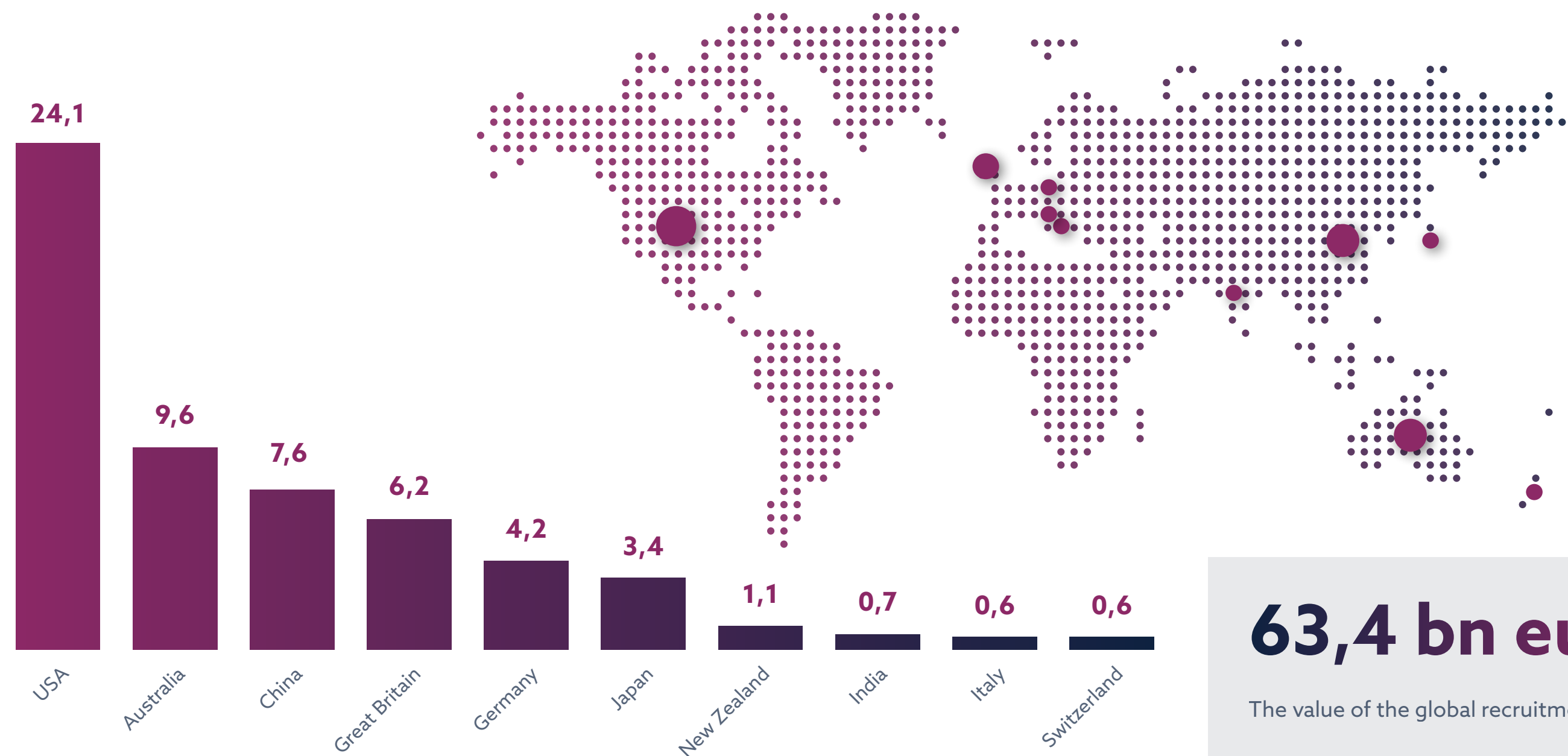
Value of recruitment services for foreign employers within PFHR members in 2019.

Most of the workers have been recruited for employers in **Netherlands and Germany**.¹²



¹² Informacja o działalności agencji zatrudnienia w 2018 roku, MPiPS, 2019 r.

Ranking of the 10 biggest markets (bn EUR)

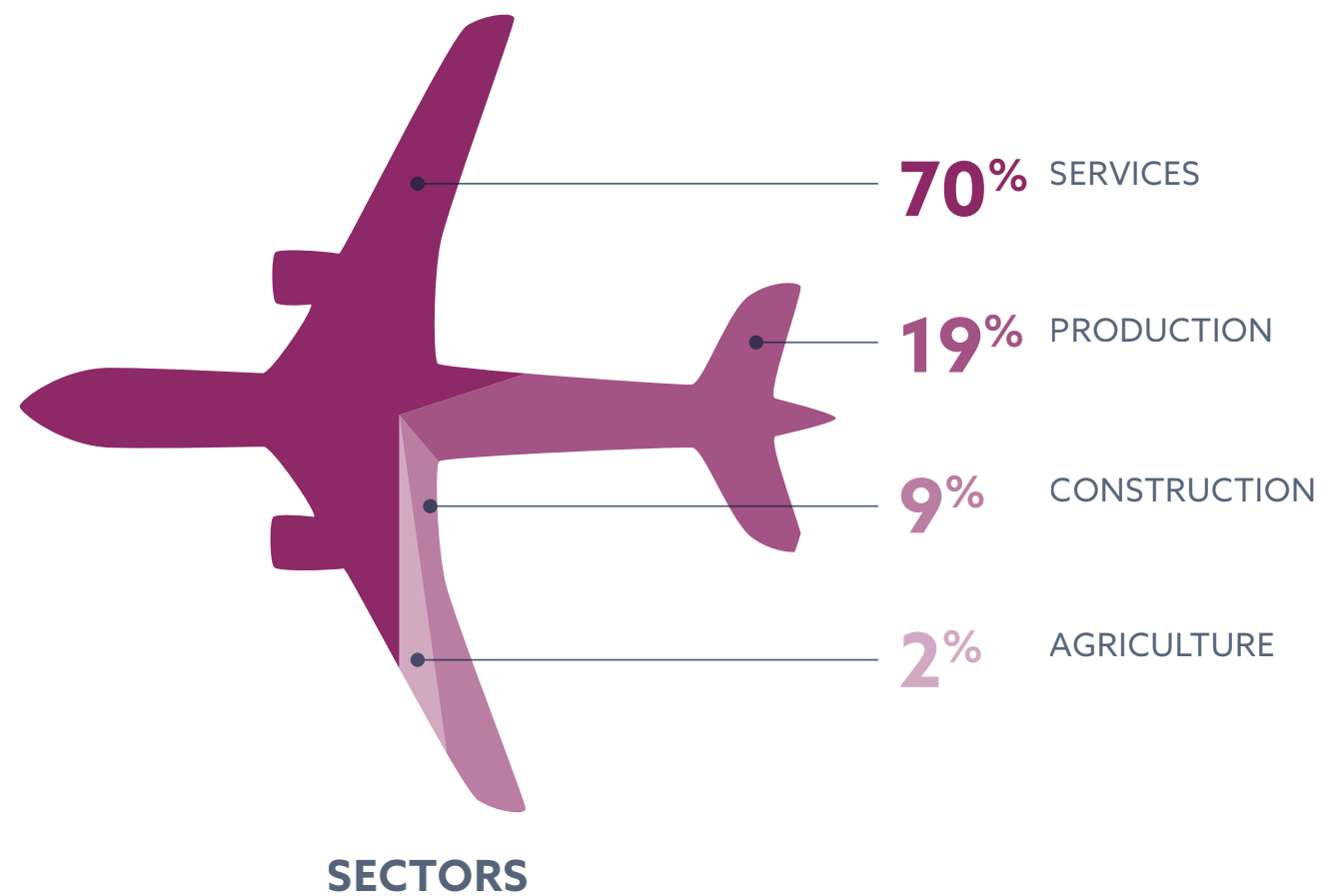


¹³ Economic Report 2020 Edition, World Employment Confederation, 2020 r.

4

Posting of workers

4 Posting of workers



21% INCREASE

235 mln PLN

Value of posting of workers services within PFHR members in 2019.



606 000

The amount of the A1 certificates issued in Poland in 2018 for the purpose of providing service in the other EU country, according to Art. 12 and in case of the activity in more than one EU country, Art. 13 of the Regulation No. 883/2004.¹⁴



48,5 000

The amount of temporary workers posted to foreign employers in 2018.¹⁵

¹⁴ Posting of Workers, Report on A1 Portable Documents issued in 2018, 2019

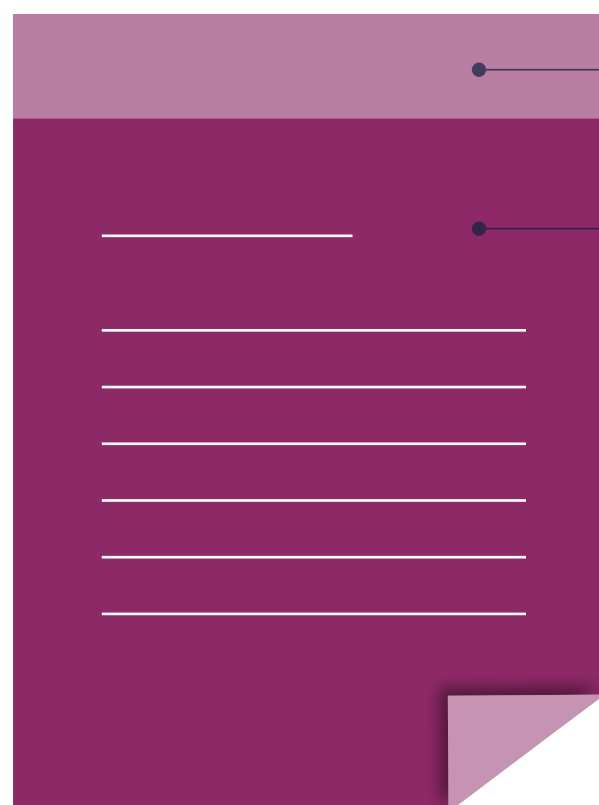
¹⁵ Informacja o działalności agencji zatrudnienia w 2018 roku, MPiPS, 2019 r.



5

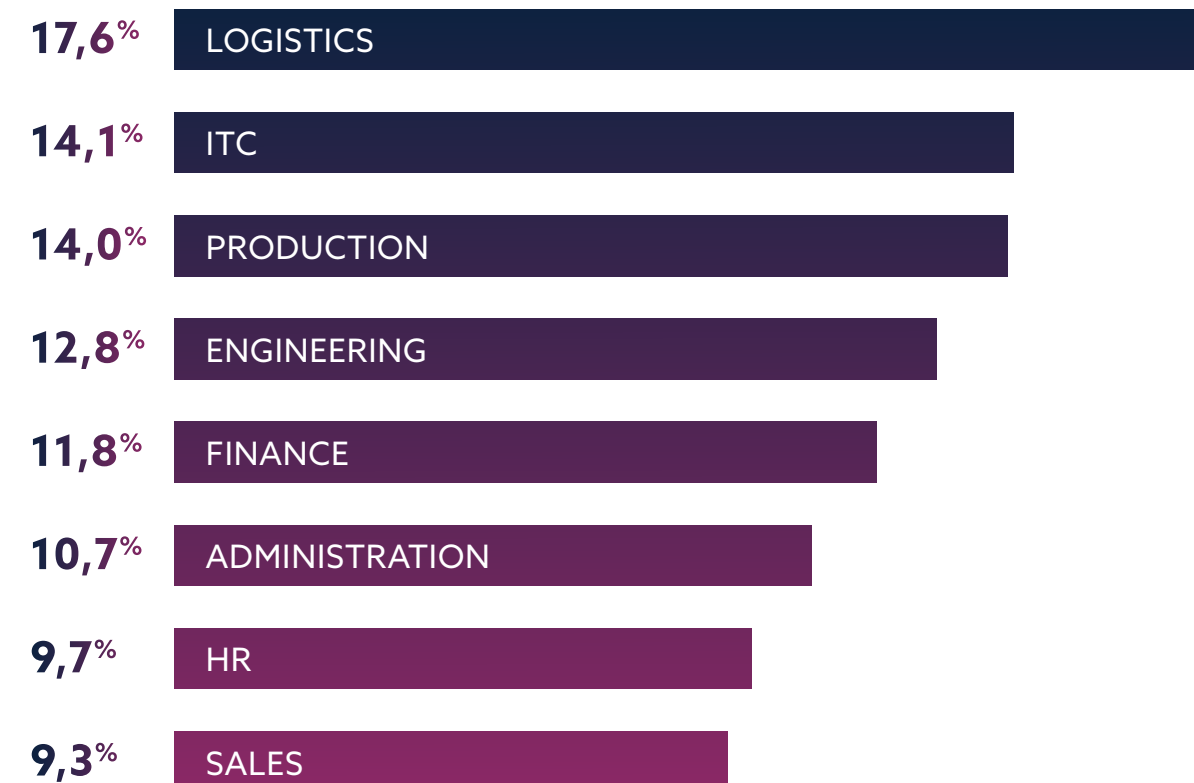
Job advertisements

Job advertisements in 2019

2,3 mlnjob advertisements
published in 2019**0,3 mln** published by employment
agencies**2,0 mln** published directly by
employers of which 0,3 mln
on the government website
oferty.praca.gov.pl

Only **780 employment agencies** published job advertisements in 2019, which is surprising in connection with the growing amount of the agencies. PFHR members published over **21%** of the total amount of the agencies advertisements.

Job advertisements in sectors



* The data provided by the company ELEMENT, www.elementapp.ai

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PARTNERS

