

REPORT 2023

The HR services market 2022

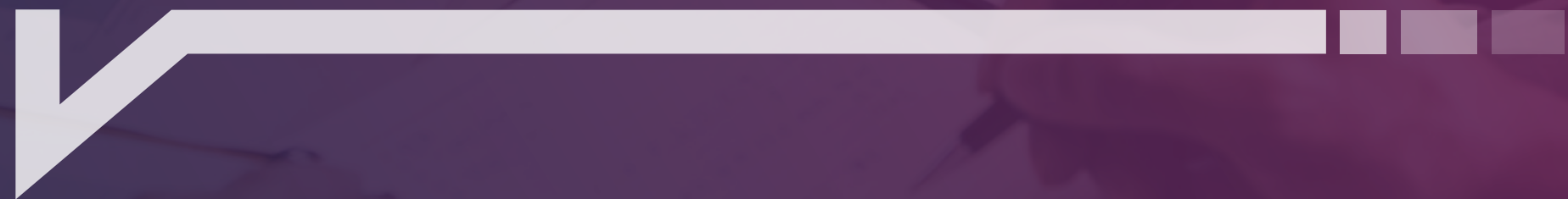


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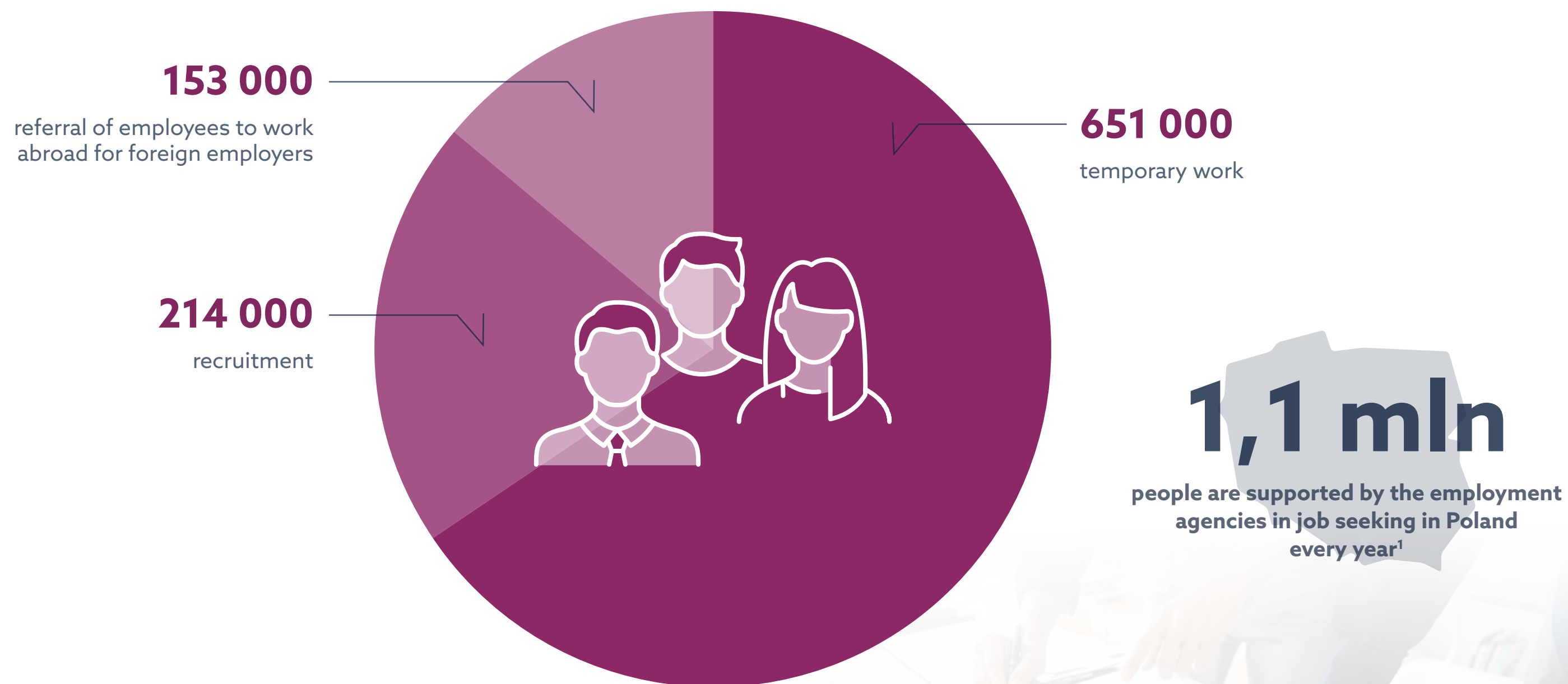
The HR Services Market 2022 Report includes historical data collected over the years by the Polish HR Forum. In 2022 the data was reported by 29 associated entities, consisting of 66 companies operating in the field of employment agencies and other HR services. In addition, the report includes information taken from the kraz.gov.pl portal and Information on the activity of employment agencies in 2021 Report, published by the Ministry of Family and Social Policy in 2022.



1

**the HR
services market**

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



¹ Informacja o działalności agencji zatrudnienia w 2021 roku, MRPiT, 2022

8799

number of employment
agencies in Poland in 2022



compared to
the previous year



5294

temporary work



7794

job placement (recruitment),
personal counseling,
career guidance²

High rotation of entities on the market



1974

number of new agencies
registered in 2022



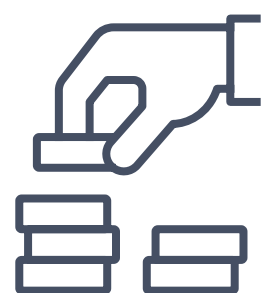
2104

number of agencies removed
from the register in 2022³

Each agency can provide services in both areas

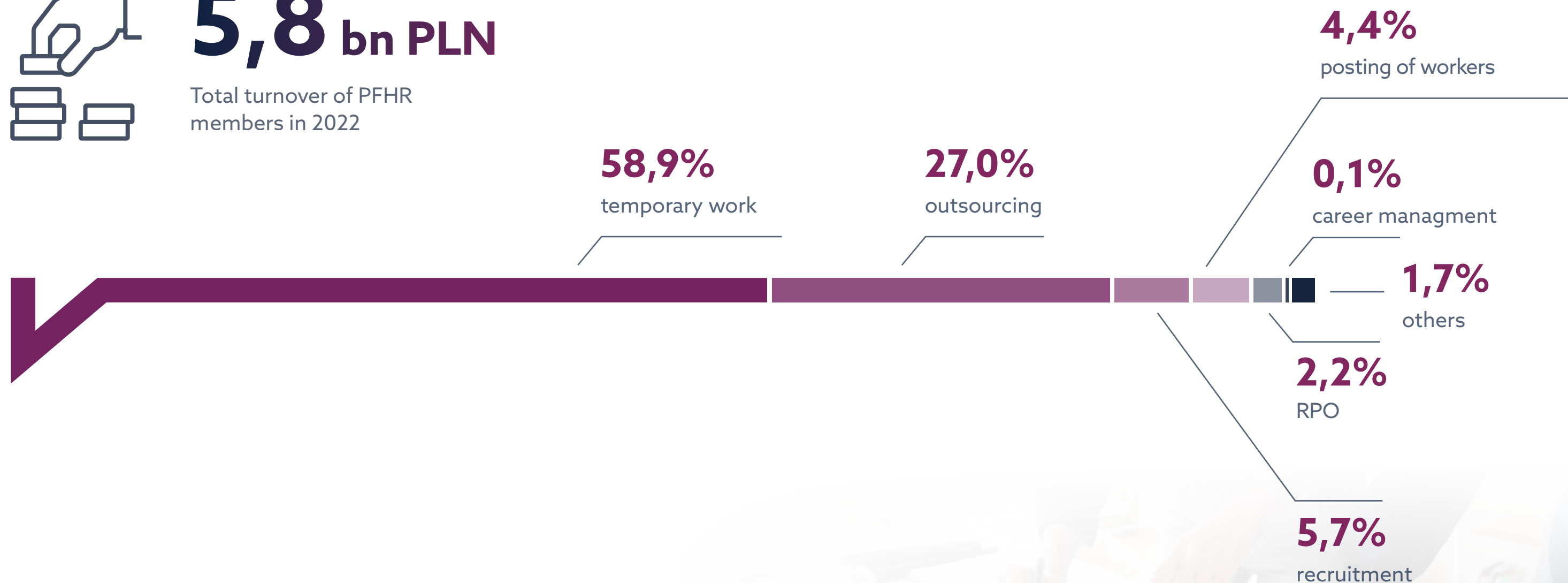
² kraz.gov.pl

³ kraz.gov.pl



5,8 bn PLN

Total turnover of PFHR members in 2022





Total turnover

1. ★ Randstad
2. ManpowerGroup
3. Grupa Adecco
4. Exact Systems
5. Hays
6. Contrain
7. OTTO Work Force
8. Trenkwalder
9. Job Impulse
10. Devire



Agency work

1. ★ Randstad
2. ManpowerGroup
3. Grupa Adecco
4. Trenkwalder
5. OTTO Work Force
6. Job Impulse
7. Gi Group
8. Hays
9. Contrain
10. CXC Global



Recruitment

1. ★ Michael Page
2. Hays
3. Devire
4. Randstad
5. Grafton
6. Antal
7. ManpowerGroup
8. Gi Group
9. Grupa Adecco
10. Kelly Services



Outsourcing

1. ★ Exact Systems
2. Grupa Adecco
3. Randstad
4. Hays
5. ManpowerGroup
6. Antal
7. Devire
8. Grafton
9. OTTO Work Force
10. People

Ranking of the largest PFHR companies in 2022





RPO

1.  ManpowerGroup
2. Randstad
3. Hays
4. Devire
5. Antal
6. Kelly Services
7. Talent Place
8. People
9. Grupa Adecco
10.  Trenkwalder



International recruitment

1.  OTTO Work Force
2. Michael Page
3. Work Force
4. Hays
5. Antal
6. Talent Place
7. 24/7 DRIVE
8. Grupa Adecco
9. IPF Group
10.  Trenkwalder



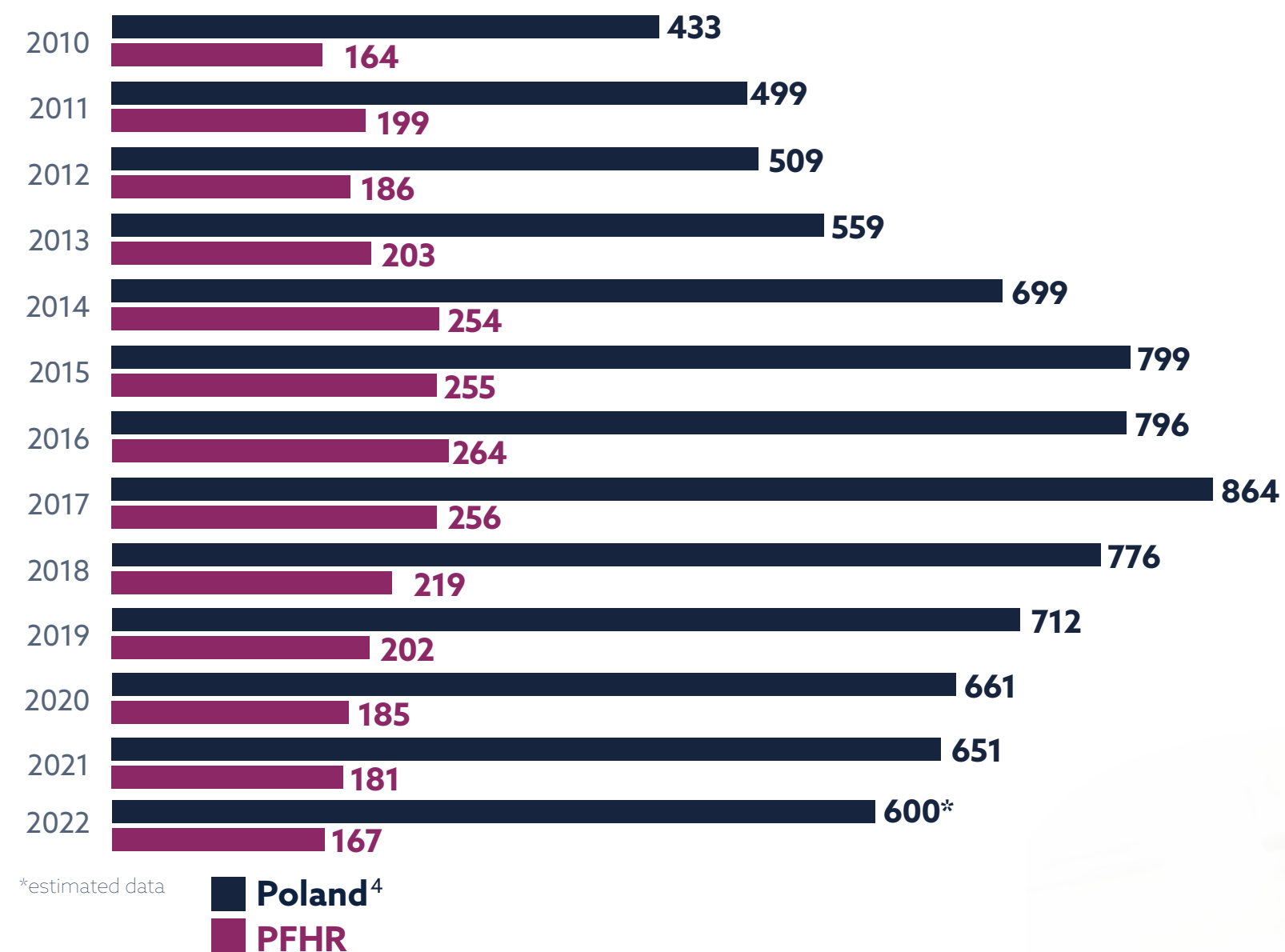
Career management

1.  Randstad
2. Hays
3. ManpowerGroup
4. Big Fish
5.  Trenkwalder

2

agency work

Number of temporary workers in 2010-2022 (in thousands)



8% DECREASE decrease in the number of temporary workers in 2022

41% of temporary workers are foreigners
The leading group are citizens of Ukraine

Percentage of employment contracts in temporary employment



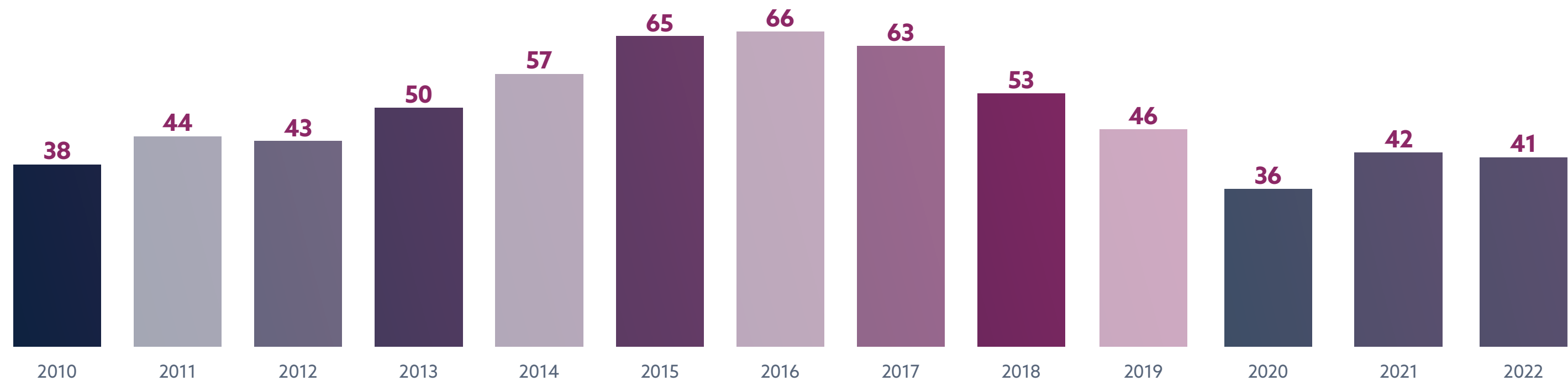
84% in PFHR member companies
45% in the whole of Poland⁶

⁴ Informacja o działalności agencji zatrudnienia, 2011-2022

⁵ Informacja o działalności agencji zatrudnienia w 2021 roku, MRPiT, 2022

⁶ Informacja o działalności agencji zatrudnienia w 2021 roku, MRPiT, 2022

FTE (full time equivalent) in PFHR (thous.)
in 2010-2022

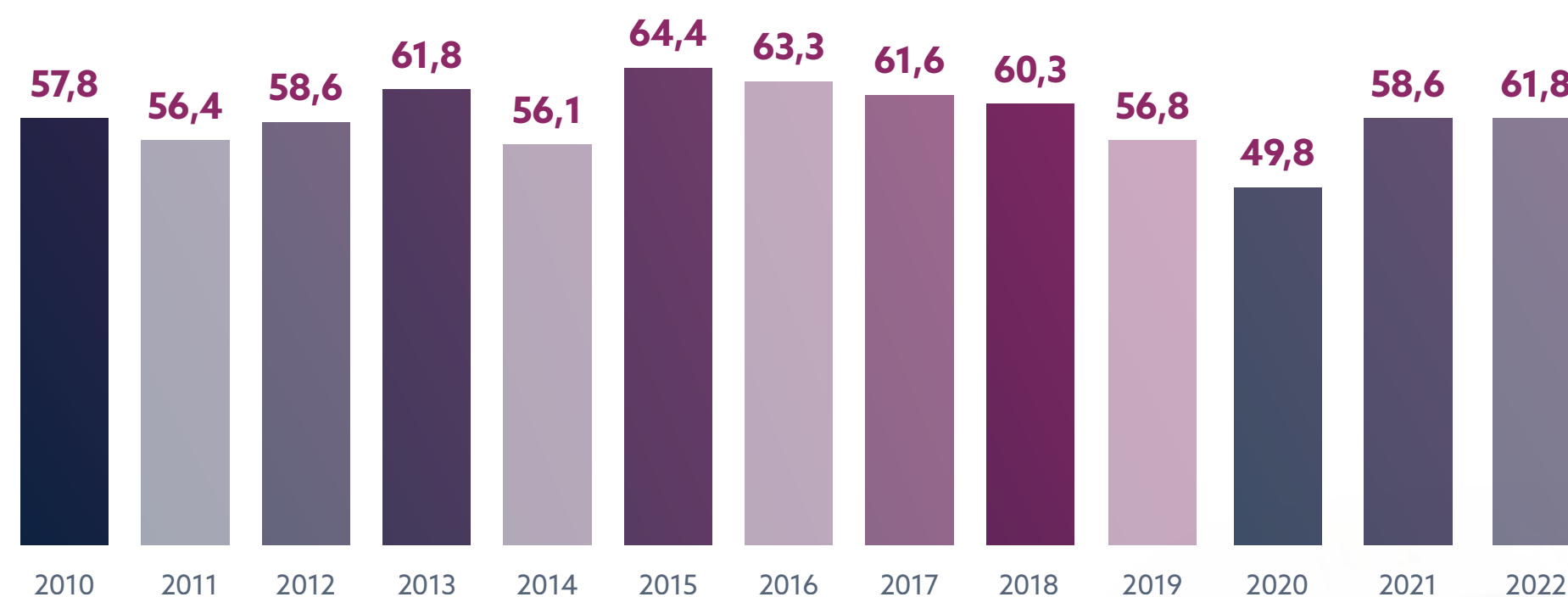


3%

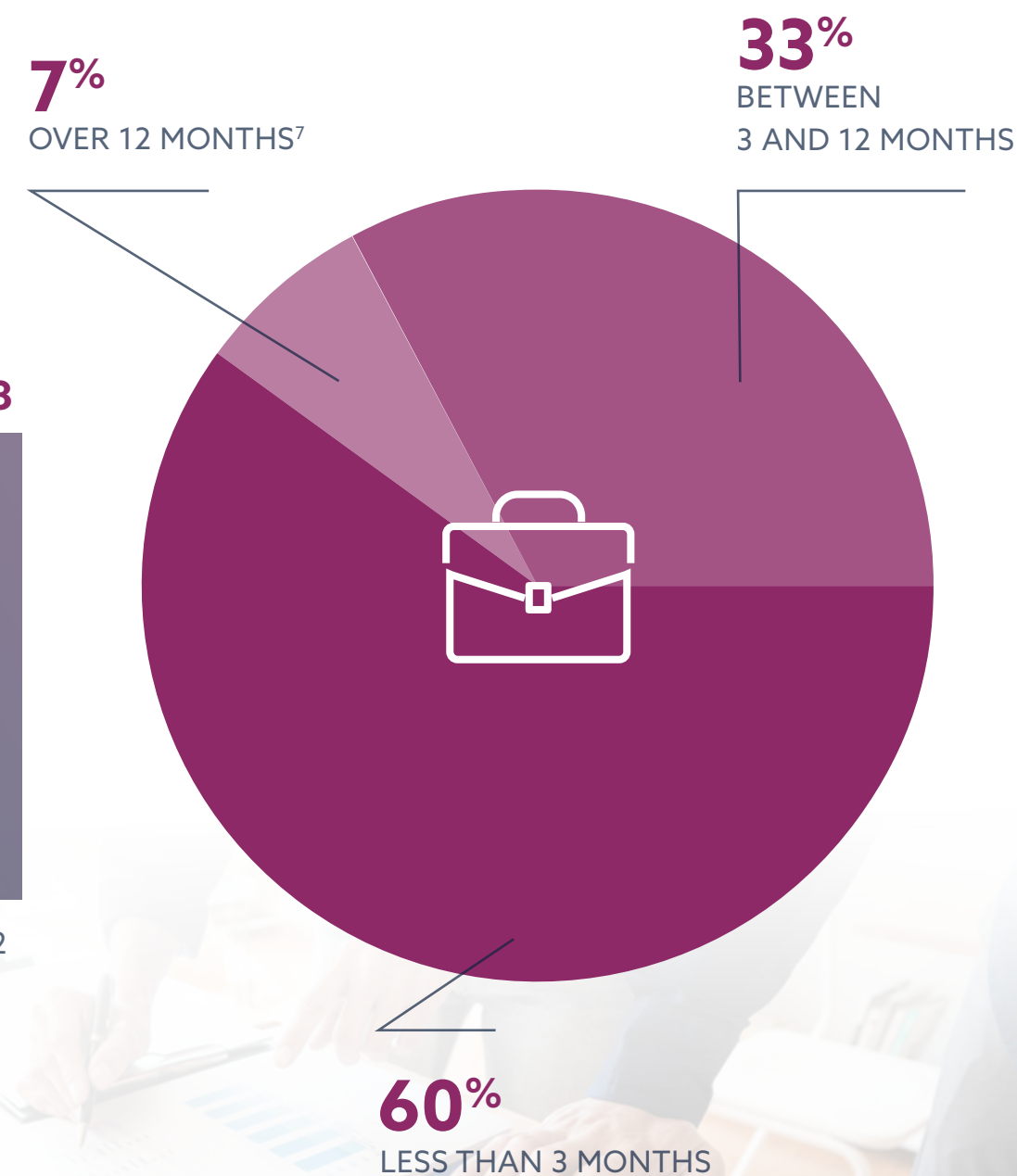
DECREASE

decrease in the number of hours worked
by temporary agency workers in terms of
full-time equivalents

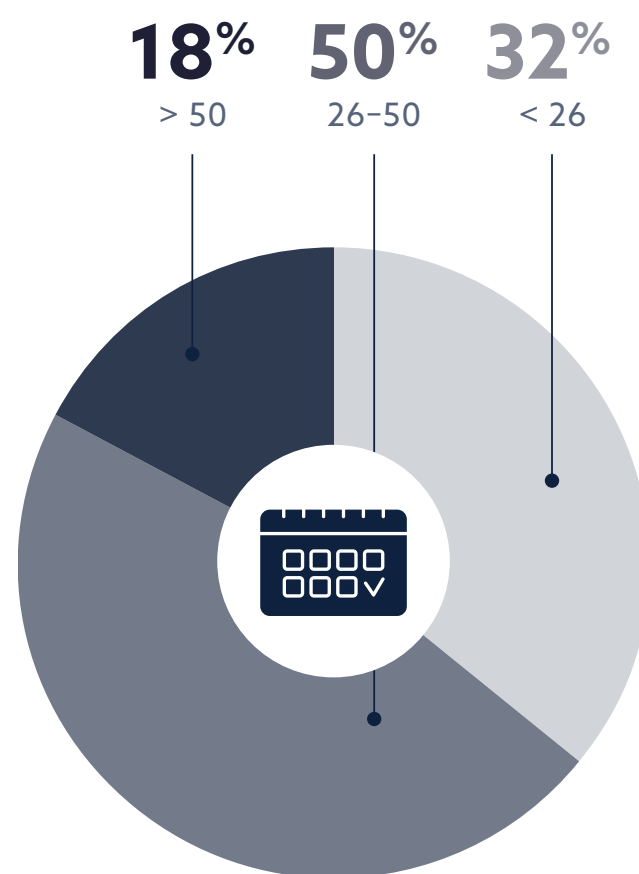
Average number of days worked by one temporary worker in Poland in 2010-2022



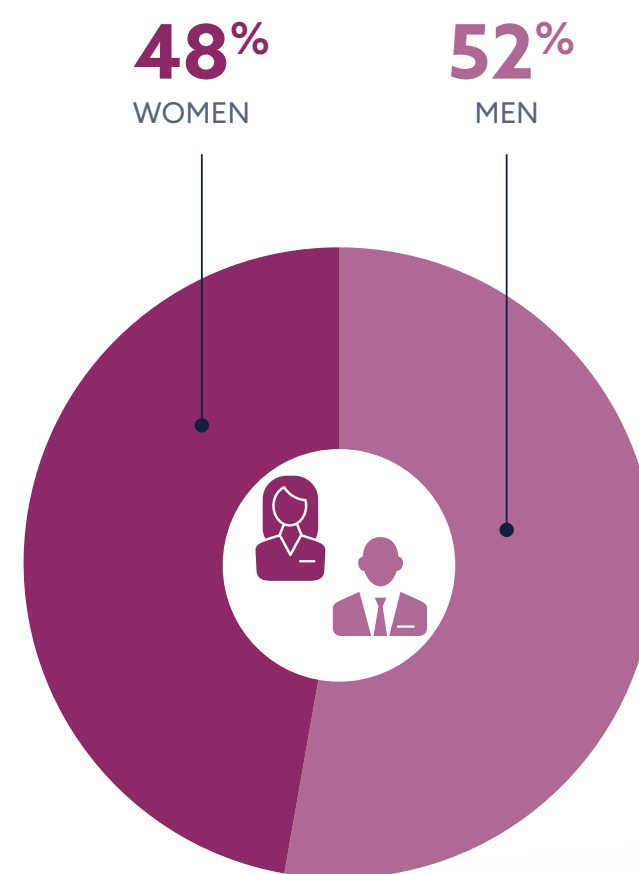
Percentage of temporary workers with a total employment period



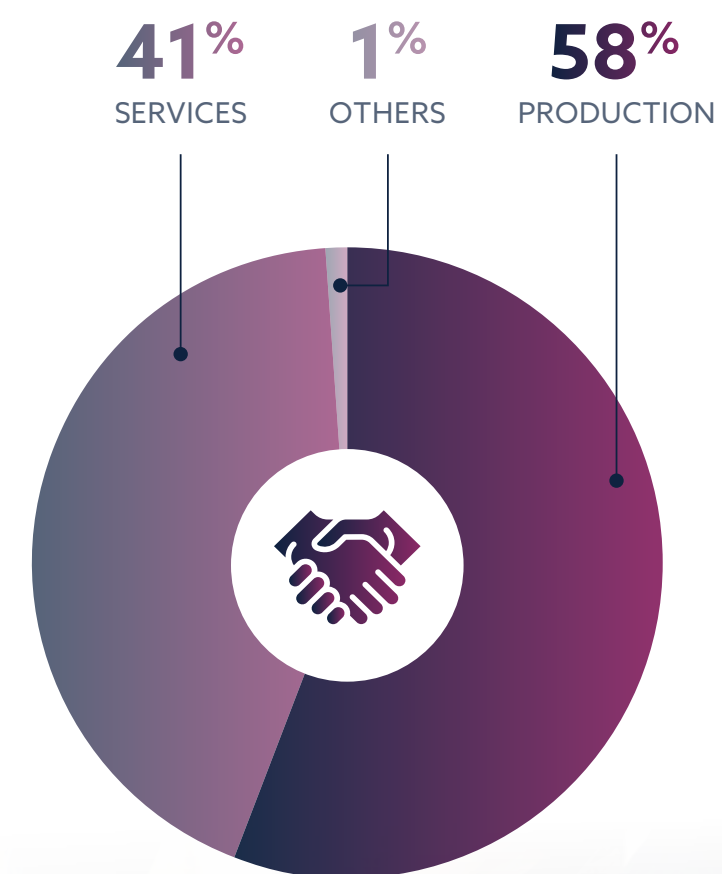
⁷ Informacja o działalności agencji zatrudnienia w 2021 roku, MRPiT, 2022



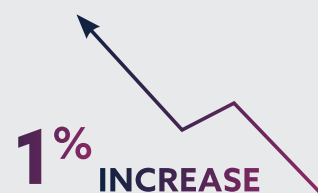
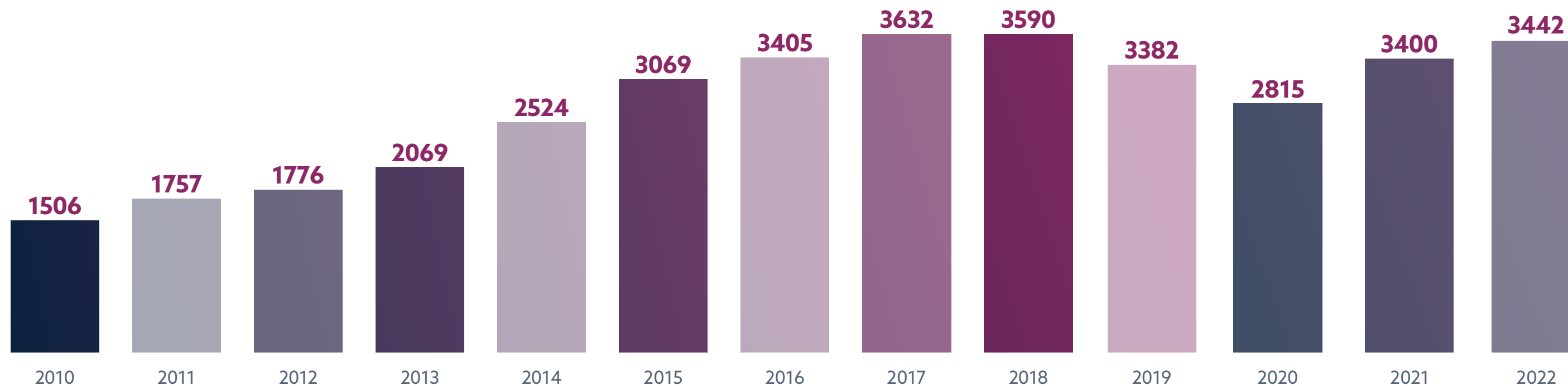
AGE



GENDER

EMPLOYMENT OF TEMPORARY
WORKERS IN SECTORS

Turnover of PFHR members in the field of temporary work
in 2010-2022 (in PLN million)



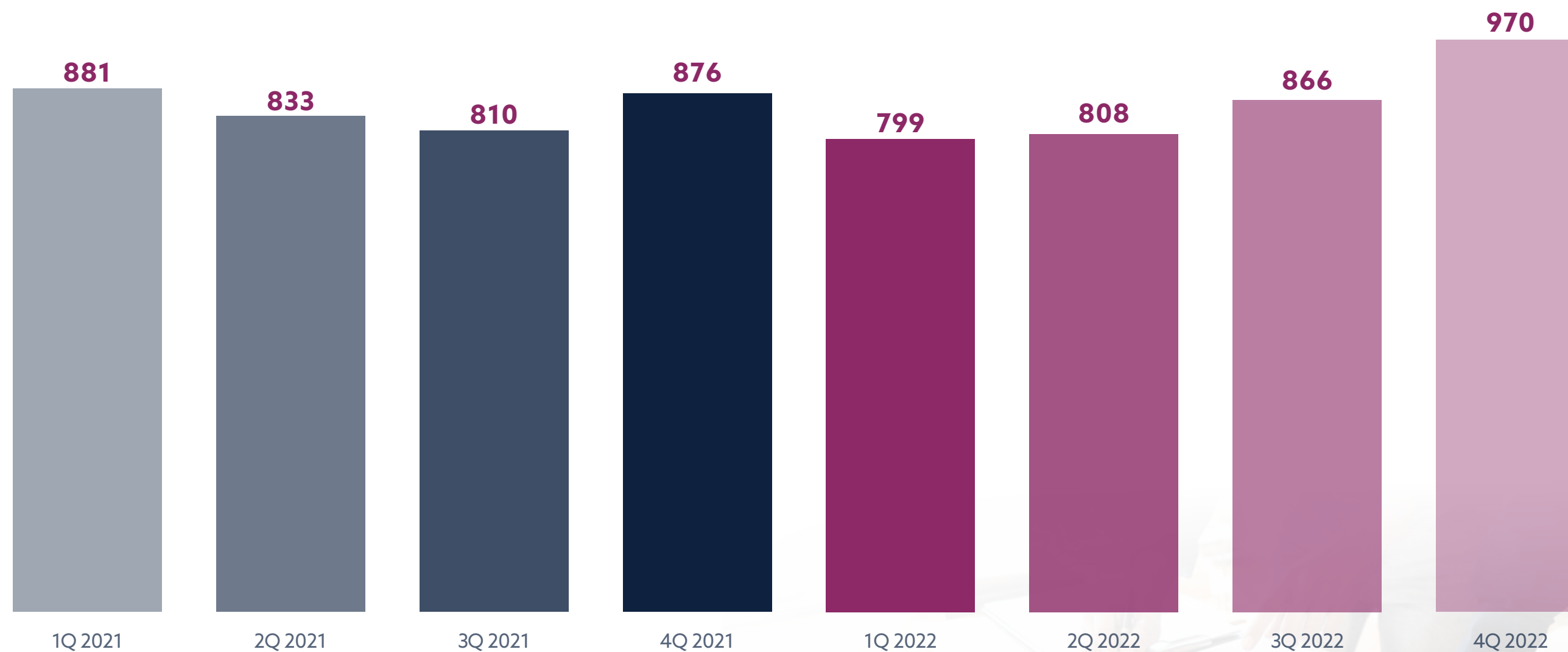
Increase of the turnover of the PFHR
agency within the temporary work service

6 bn PLN

ESTIMATED VALUE OF POLISH
TEMPORARY WORK MARKET

Value of the temporary work market in Poland

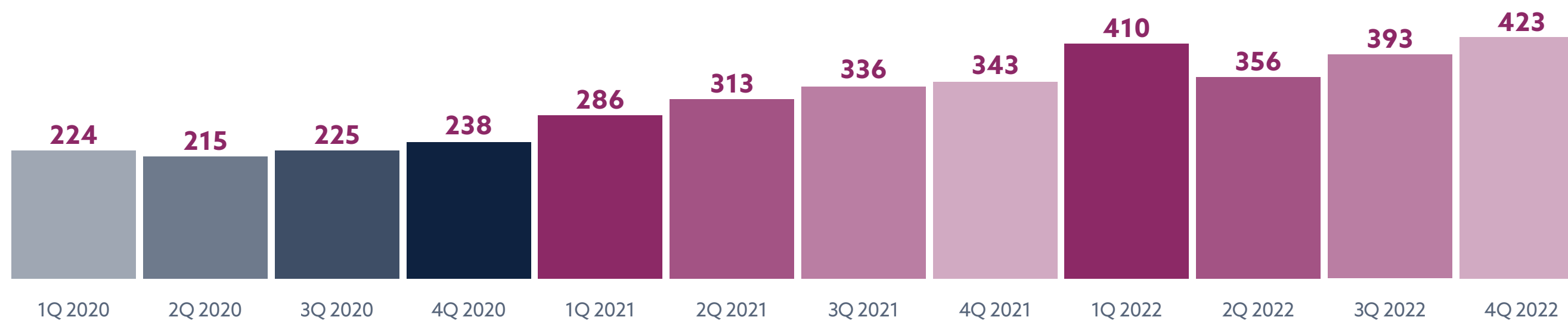
Quarterly turnover in temporary employment of PFHR agencies
in years 2020 - 2022 (in PLN million)



3

outsourcing

Quarterly turnover of the PFHR member companies in outsourcing services
in the years 2020-2022 (in PLN million)



1 582 mln PLN

THE VALUE OF PFHR MEMBERS IN THE FIELD OF
OUTSOURCING SERVICES IN 2022

24% INCREASE
increase of outsourcing
market value

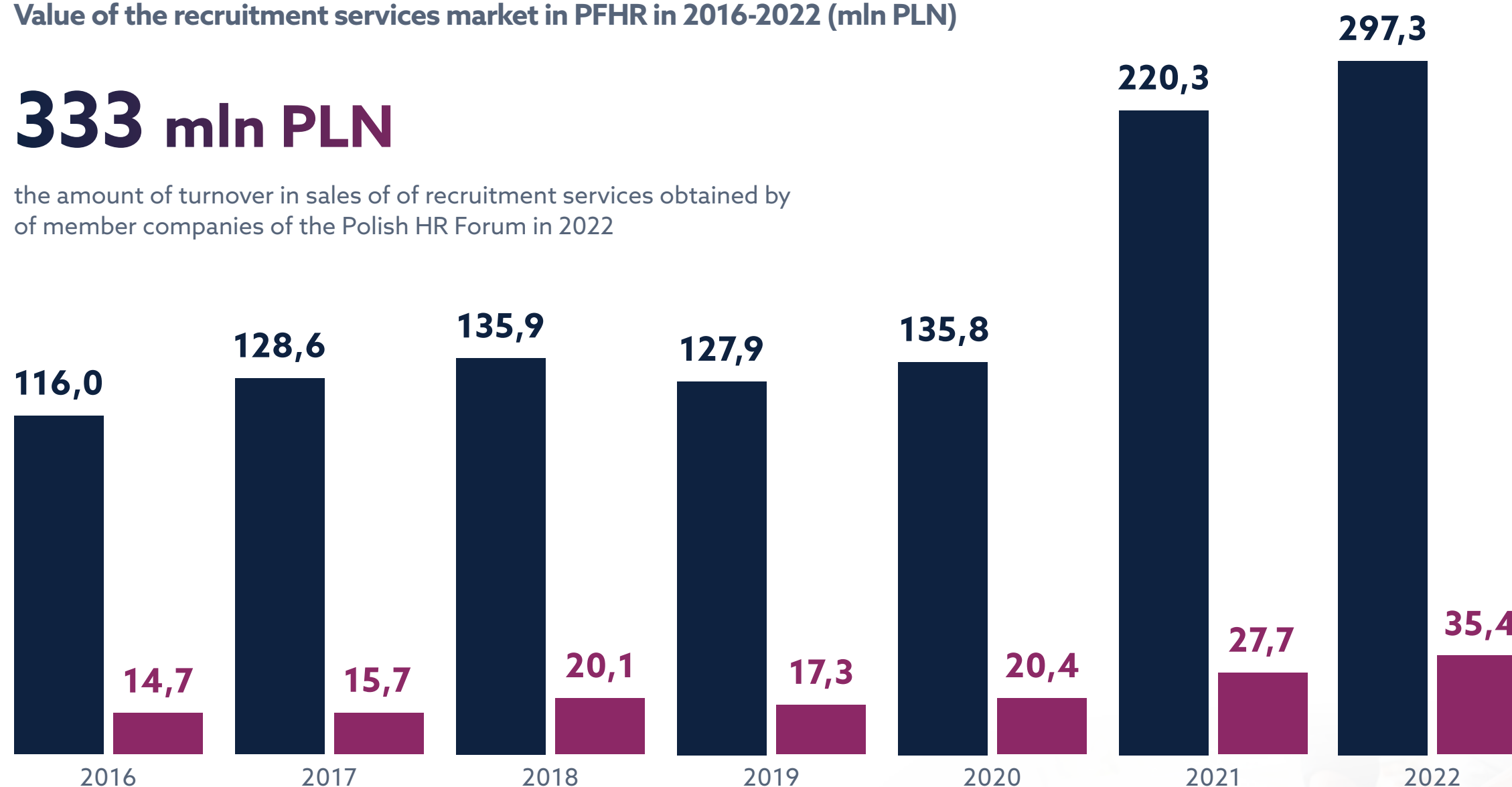
4

recruitment

Value of the recruitment services market in PFHR in 2016-2022 (mln PLN)

333 mln PLN

the amount of turnover in sales of recruitment services obtained by member companies of the Polish HR Forum in 2022



RECRUITMENT SERVICES
FOR POLISH EMPLOYERS

RECRUITMENT SERVICES
FOR FOREIGN EMPLOYERS

35%
INCREASE

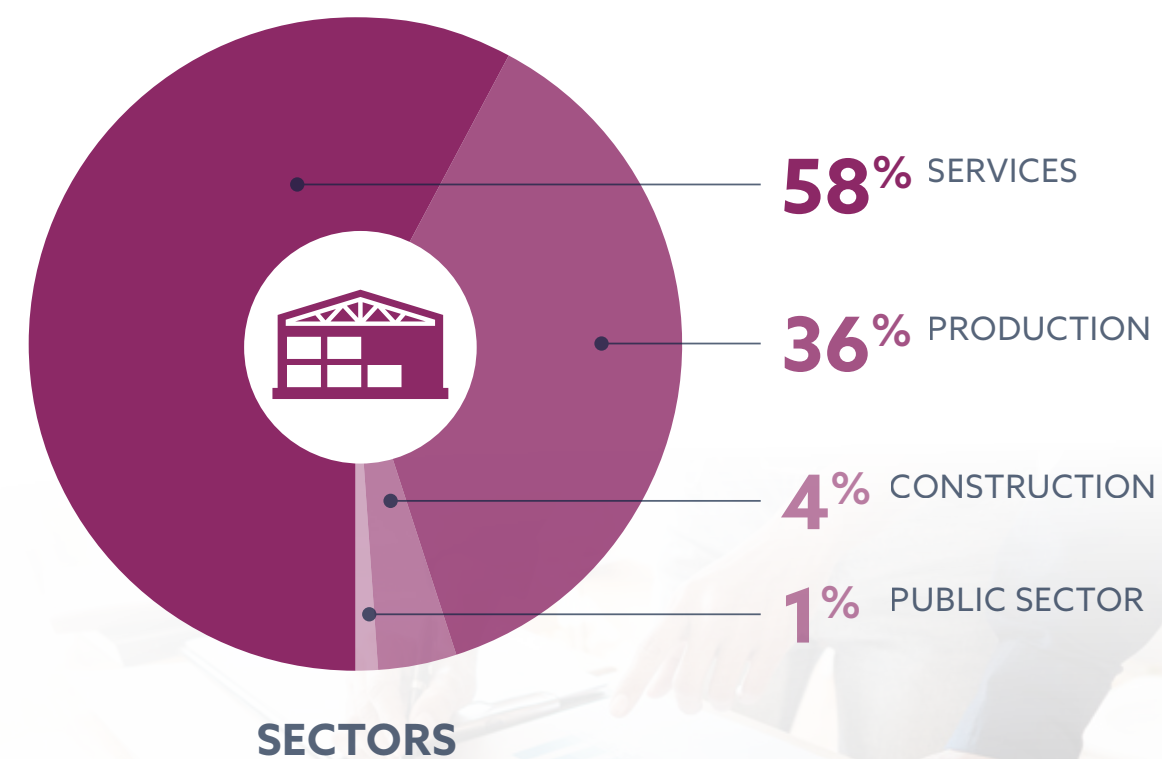
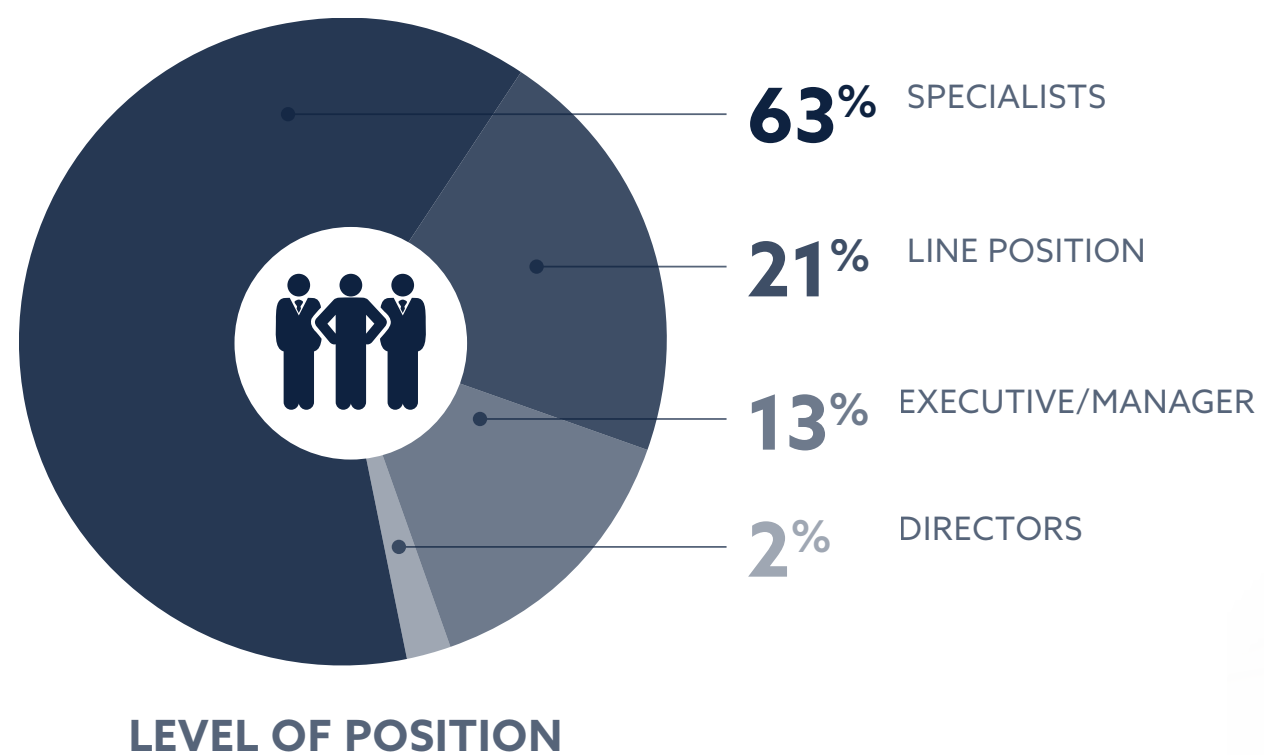
growth of the
recruitment
market for Polish
employers

28%
INCREASE

growth of the
recruitment
market for foreign
employers

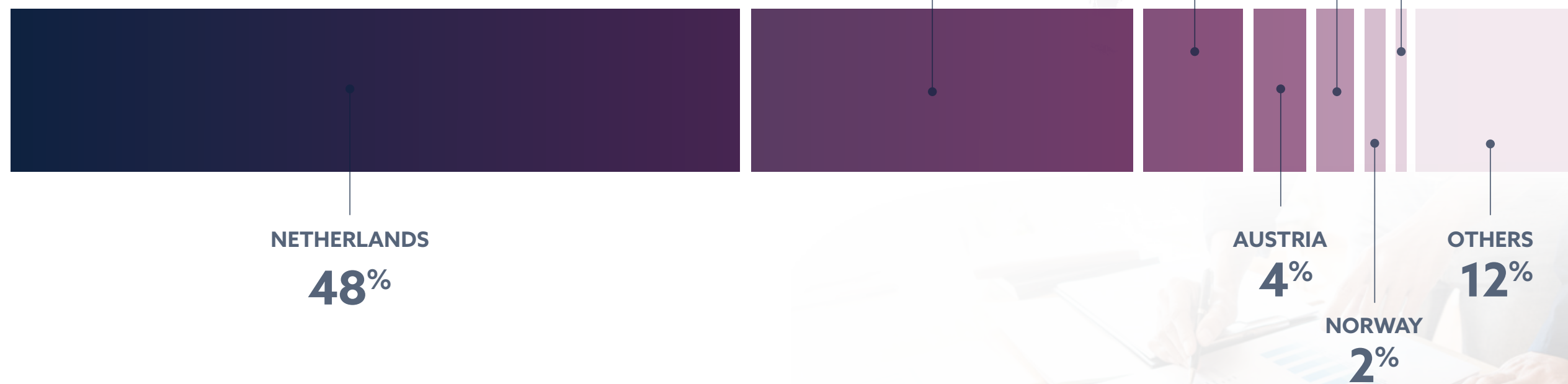
297,3 mln PLN

value of recruitment services for Polish employers within PFHR members



35,4 mln PLN

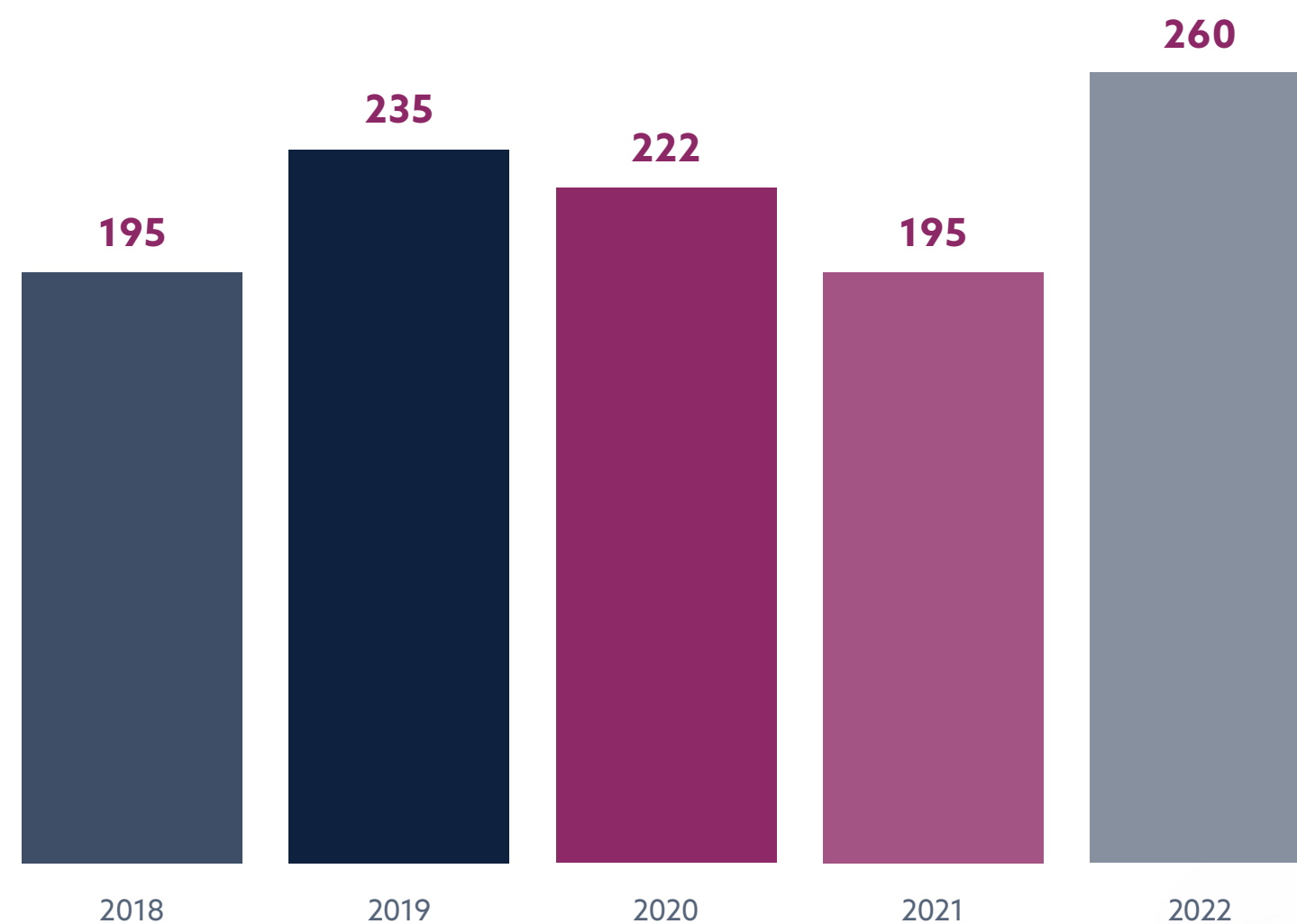
value of recruitment services for foreign employers within PFHR members

Countries to which agencies referred the most people to work for foreign employers⁸⁸ Informacja o działalności agencji zatrudnienia w 2021 roku, MRPiT, 2022 r.

5

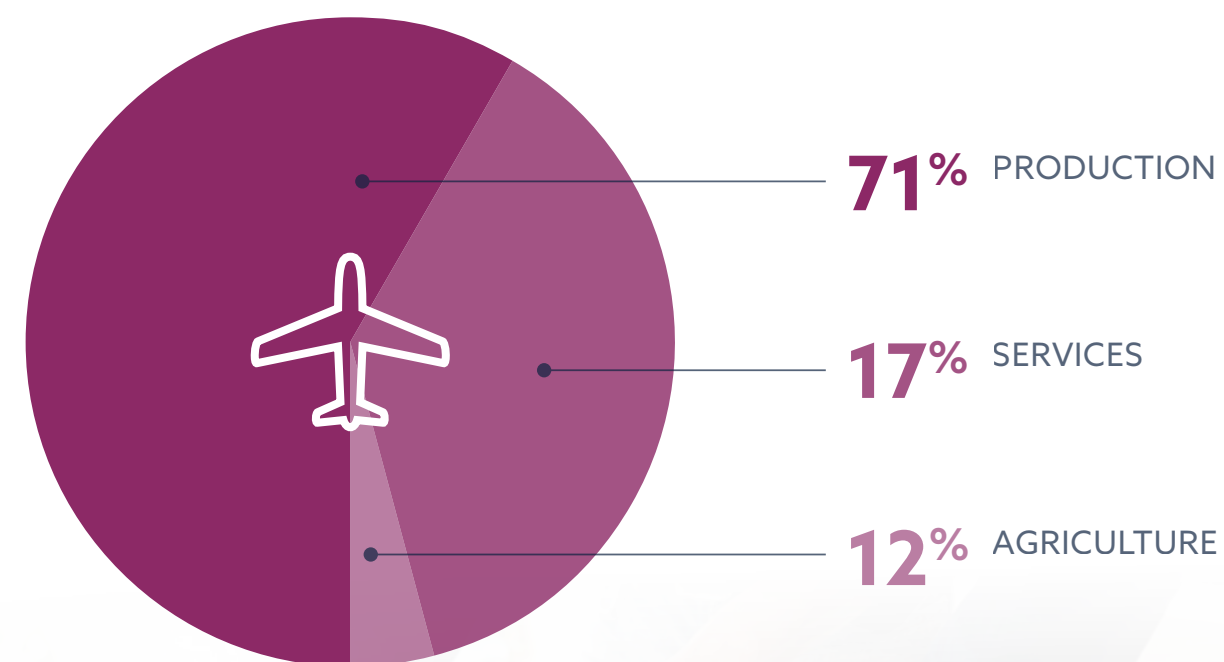
**posting of
workers**

Turnover of PFHR member companies in the field
of posting of workers to foreign employers
in the years 2018-2022 (in PLN million)



36 700

Number of temporary agency workers
sent to foreign employers in 2021⁹



SECTORS

⁹ Informacja o działalności agencji zatrudnienia w 2021 roku, MRPiT, 2022 r.

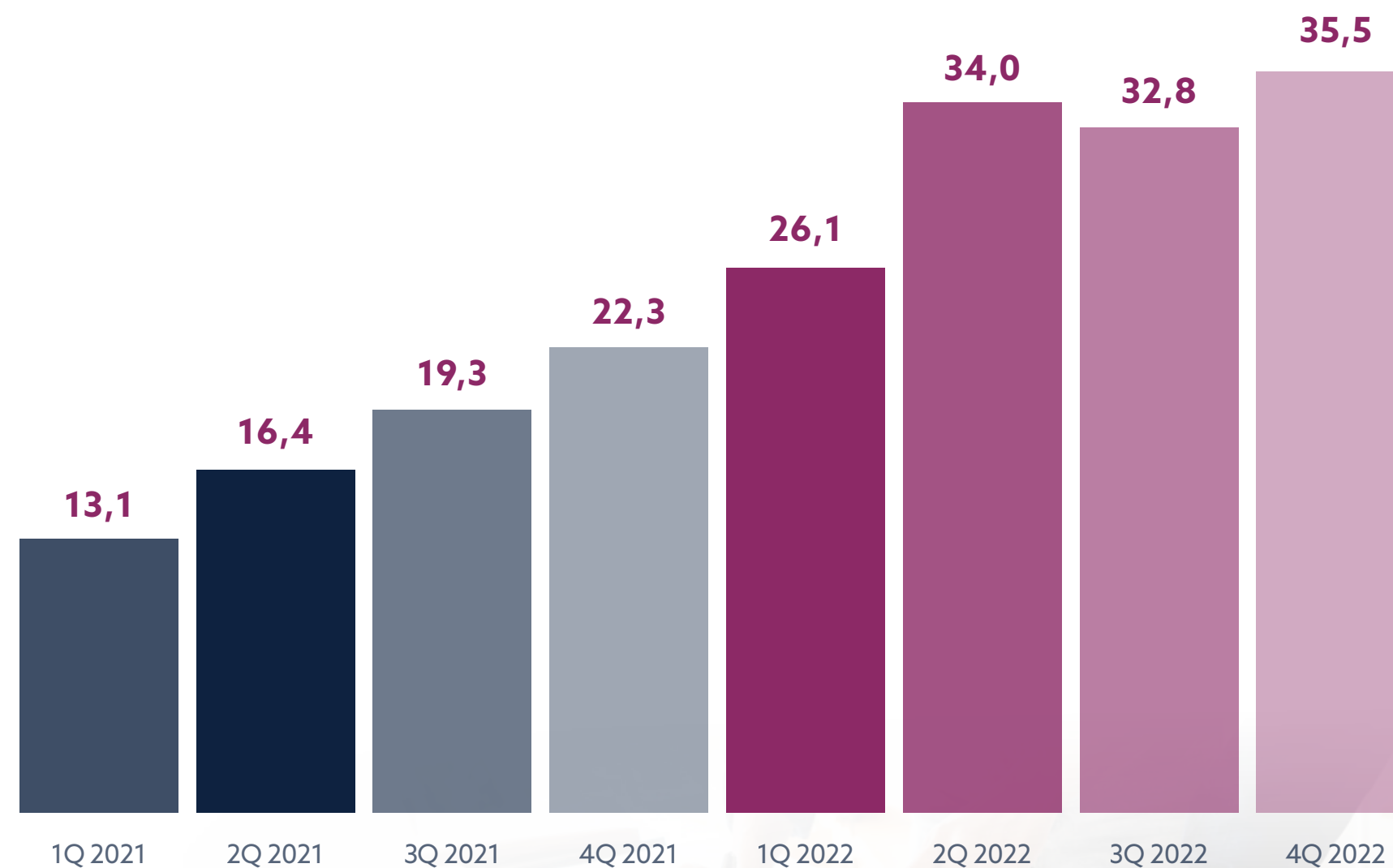
RPO Recruitment Process Outsourcing - a service provided by specialized external provider who takes on the role of client's recruitment department by taking over and managing part or the entire recruitment process and related partner relationships in the supply chain, providing the necessary skills, activities tools, technologies and process methodologies.

128 mln PLN

turnover of PFHR member companies in RPO services in 2022

80% INCREASE year-on-year growth in turnover

Quarterly turnover of PFHR member companies in terms of RPO services 2021-2022 (in PLN million)



7

**career
management**

Career management

Services in the field of upskilling and reskilling

Range of services:

Outplacement

- Individual Outplacement
- Group Outplacement

Carrier mobility

(redeployment, „internal outplacement“)

Talent attraction and selection

- Employer branding
- Assessment center
- Psychometric tests and questionnaires

Development of employee skills

- Evaluation 360 or 180
- Development center
- Career paths
- Career coaching
- Talent management
- Team development tools
- Introductory and improvement trainings

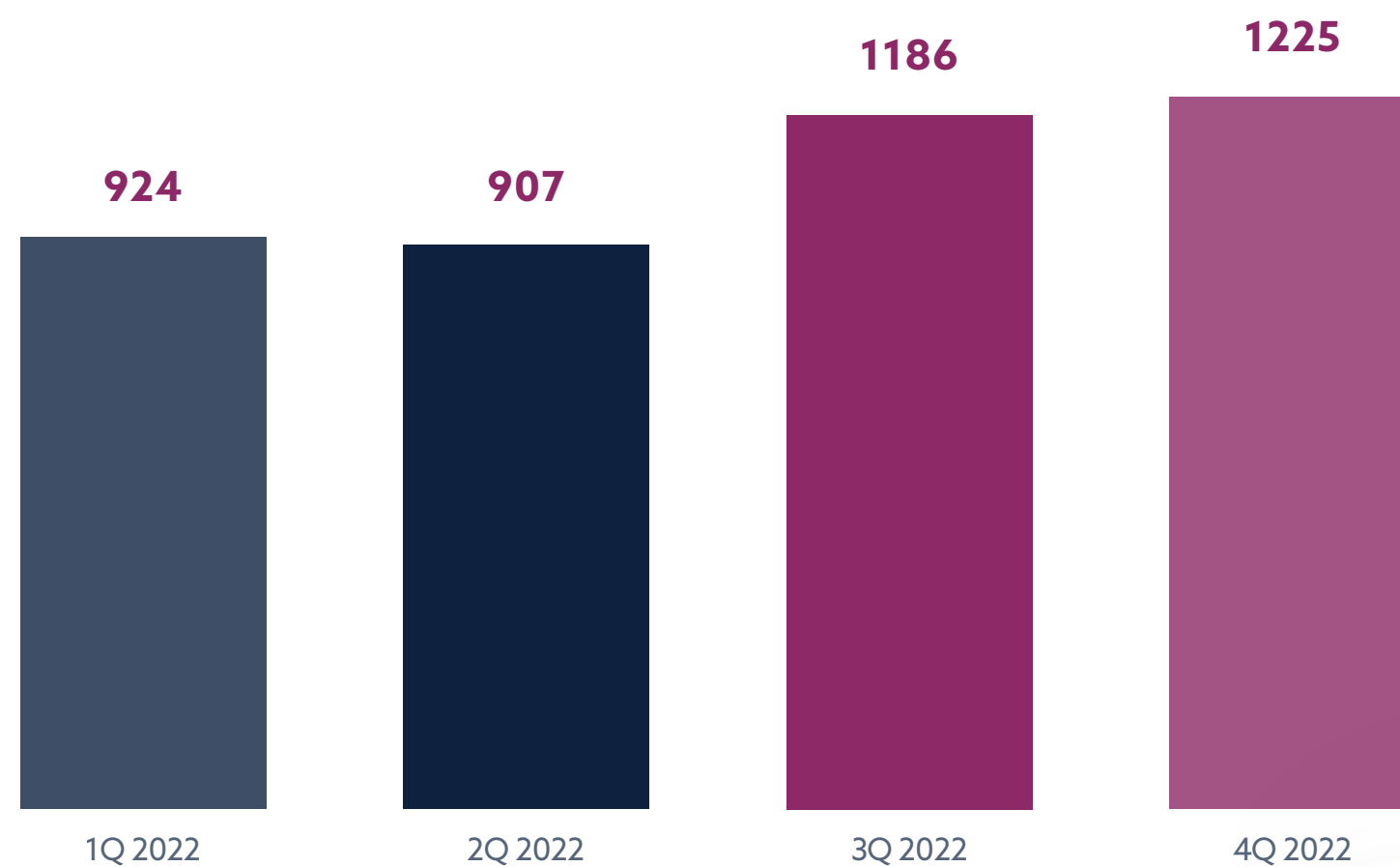
Efficiency of employees and the company

- Audit of HR processes
- Performance management
- Competency management
- Diversity management
- Remuneration systems
- Outsourcing HRBP
- Voluntary Redundancy Programs
- Succession plans
- Ethical Behavior Management in organisation

Employee engagement

- Employee engagement survey
- Job satisfaction survey
- Employee opinion polls

Quarterly turnover of PFHR member companies in terms of Career management services
in 2022 (in PLN million)



4,2 mln PLN

turnover of PFHR member companies
in the field of Career management services

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MEMBERS

