



THE HR SERVICES MARKET 1Q2023

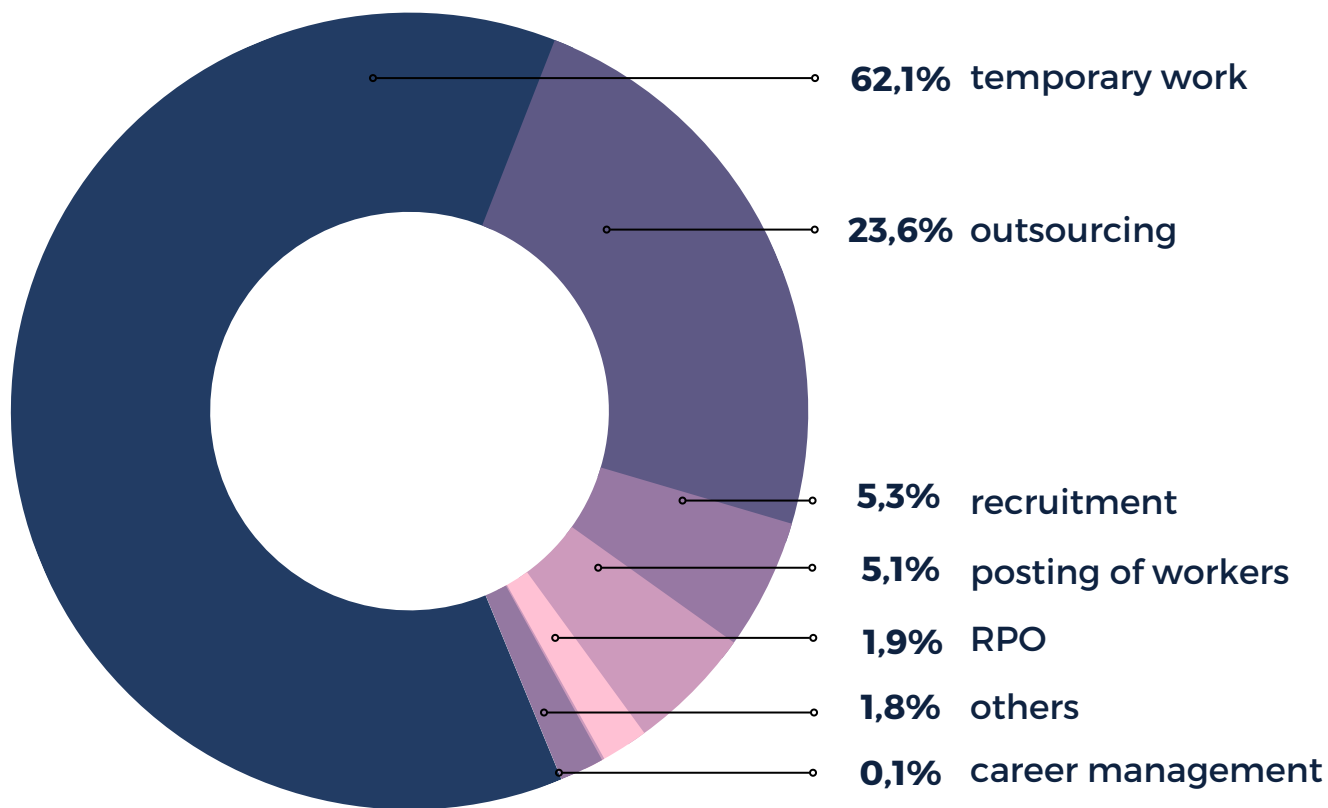




The data presented in the report refers to the results of 31 entities affiliated with the Polish HR Forum (PFHR) achieved in the first quarter of 2023 (1Q2023). As an affiliated entity may be a capital group, the data concerns a total of 68 companies.

The value of the HR services market 1Q2023

Total turnover of member firms by service



1 647 mln PLN

Total turnover of PFHR
members in w 1Q2023

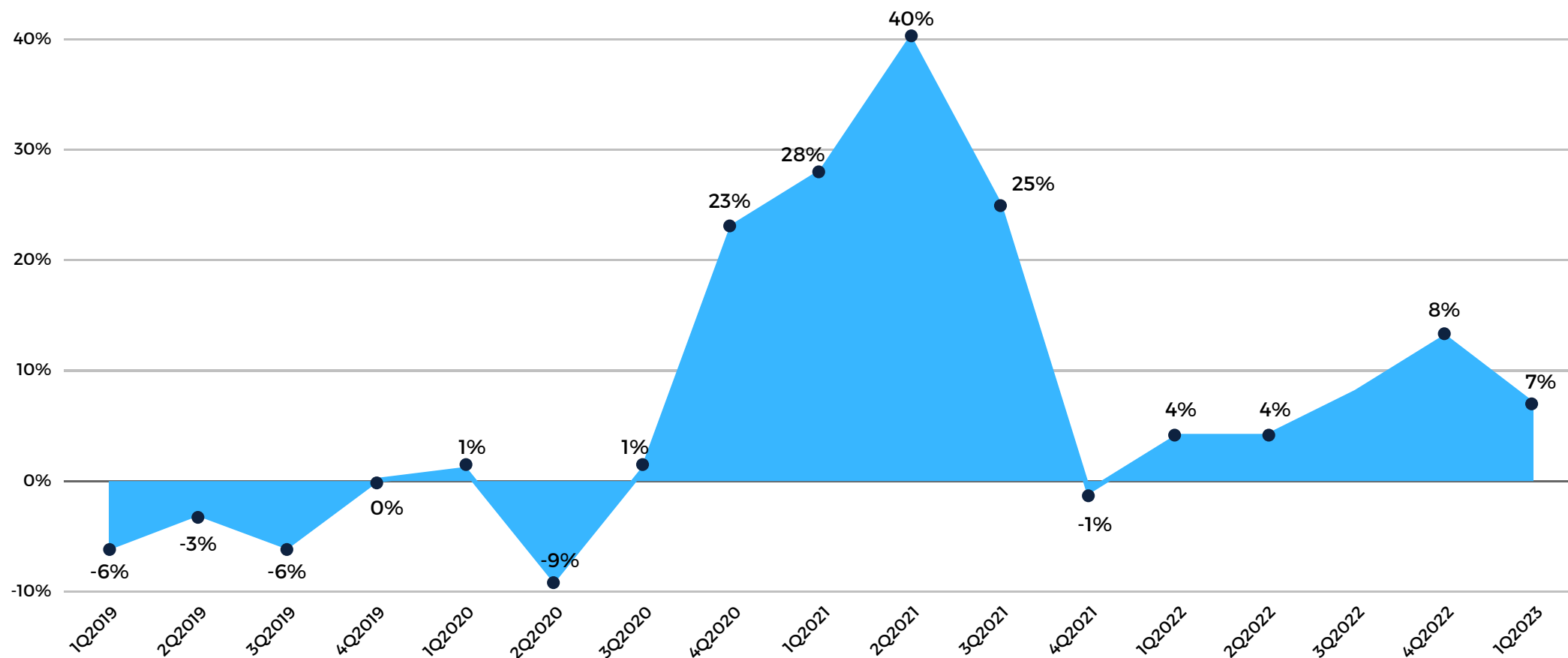
 **7%**

year-on-year increase *

*trend after adjustment for change in
number of reporting entities

Market growth/decrease

Increase/decrease in total turnover compared to the same quarter of the previous year



Ranking of the largest PFHR companies in 1Q2023

Total turnover	Agency work	Recruitment	Outsourcing
1. ★ Randstad	1. ★ Randstad	1. ★ Michael Page	1. ★ Exact Systems
2. ManpowerGroup	2. ManpowerGroup	2. Gi Group Holding	2. Grupa Adecco
3. Grupa Adecco	3. Grupa Adecco	3. Hays	3. Hays
4. Gi Group Holding	4. Gi Group Holding	4. Devire	4. Randstad
5. Hays	5. Trenkwalder	5. Randstad	5. ManpowerGroup
6. OTTO Work Force	6. OTTO Work Force	6. Antal	6. Devire
7. Exact Systems	7. Hays	7. ManpowerGroup	7. Antal
8. Trenkwalder	8. Job Impulse	8. Grupa Adecco	8. Gi Group Holding
9. Contrain	9. Interkadra	9. Kelly Services	9. Interkadra
10. Interkadra	10. Contrain	10. Trenkwalder	10. People

Ranking of the largest PFHR companies in 1Q2023

Posting of workers

1. ★ Contrain
2. Interkadra
3. IPF Group
4. Job Impulse
5. Randstad
6. Trenkwalder

RPO

1. ★ Randstad
2. ManpowerGroup
3. Hays
4. Devire
5. Kelly Services
6. Talent Place
7. Antal
8. People
9. IPF Group

International recruitment

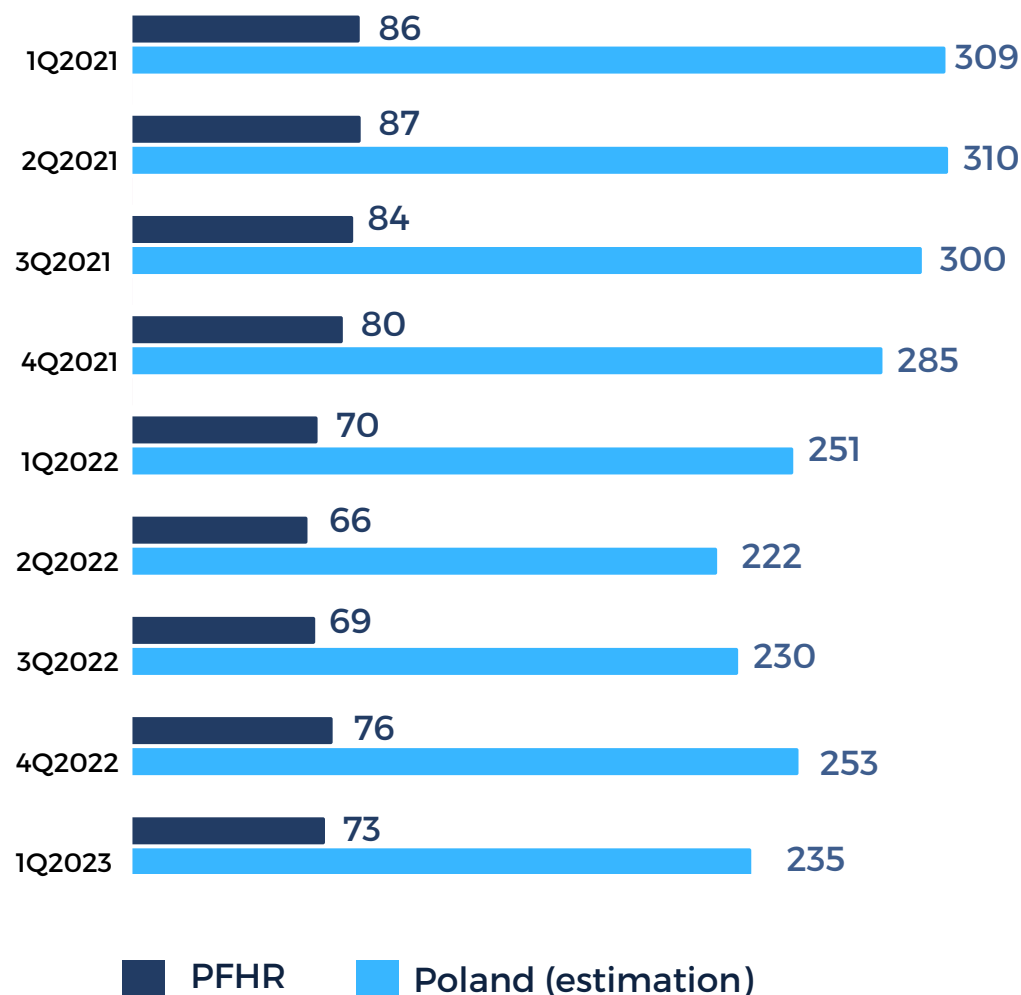
1. ★ OTTO Work Force
2. Michael Page
3. Talent Place
4. Antal
5. Work Force
6. 24/7 DRIVE
7. Orienta
8. IPF Group
9. Jobhouse
10. Grupa Adecco

Career management

1. ★ Randstad
2. Hays
3. ManpowerGroup

Number of temporary workers

Number of temporary workers (in thousands)



⚡ 6%

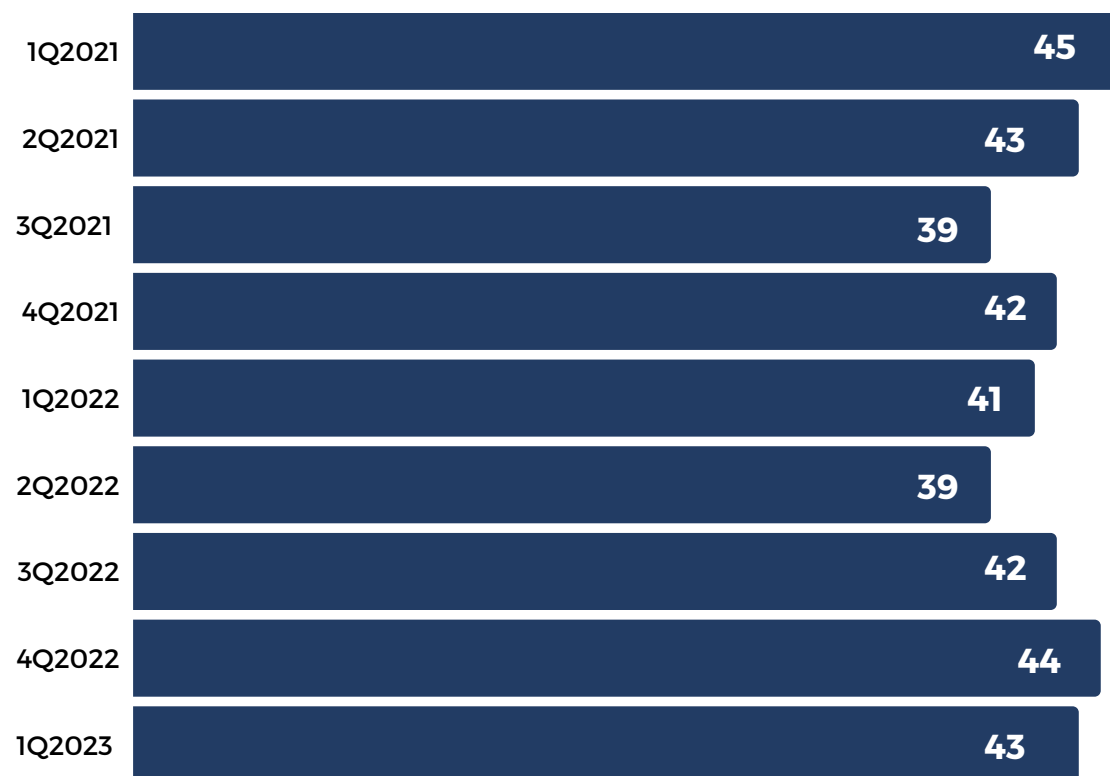
year-on-year decrease

📄 88%

percentage of
employment contracts
concluded by PFHR
member companies
with temporary
workers

Temporary work - FTE

FTE in PFHR - full time equivalent (thous.)

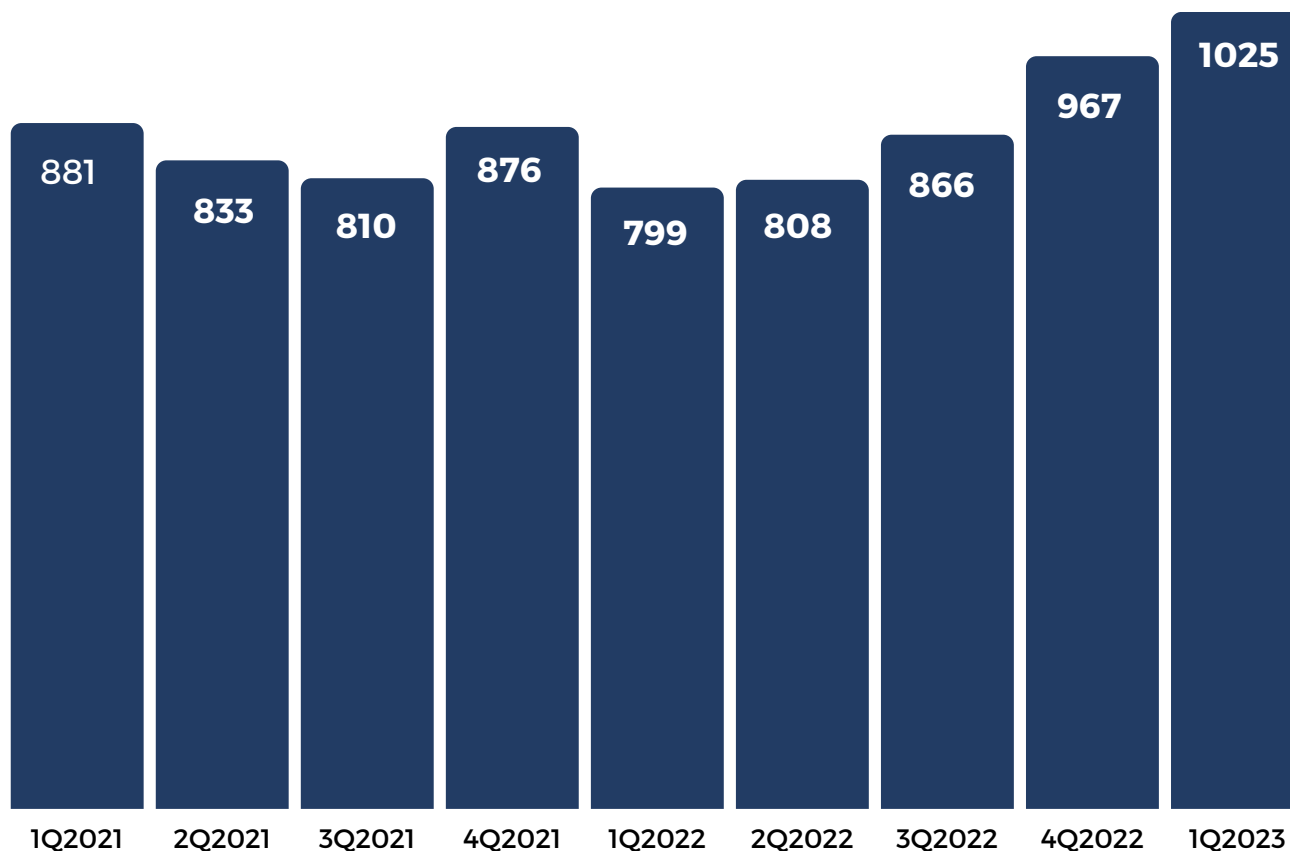


8%

year-on-year decrease

Value of the temporary work

Temporary work turnover of PFHR member companies (in millions)



 **15%**

year-on-year increase*

*trend after adjustment for change in number of reporting entities

 **4%**

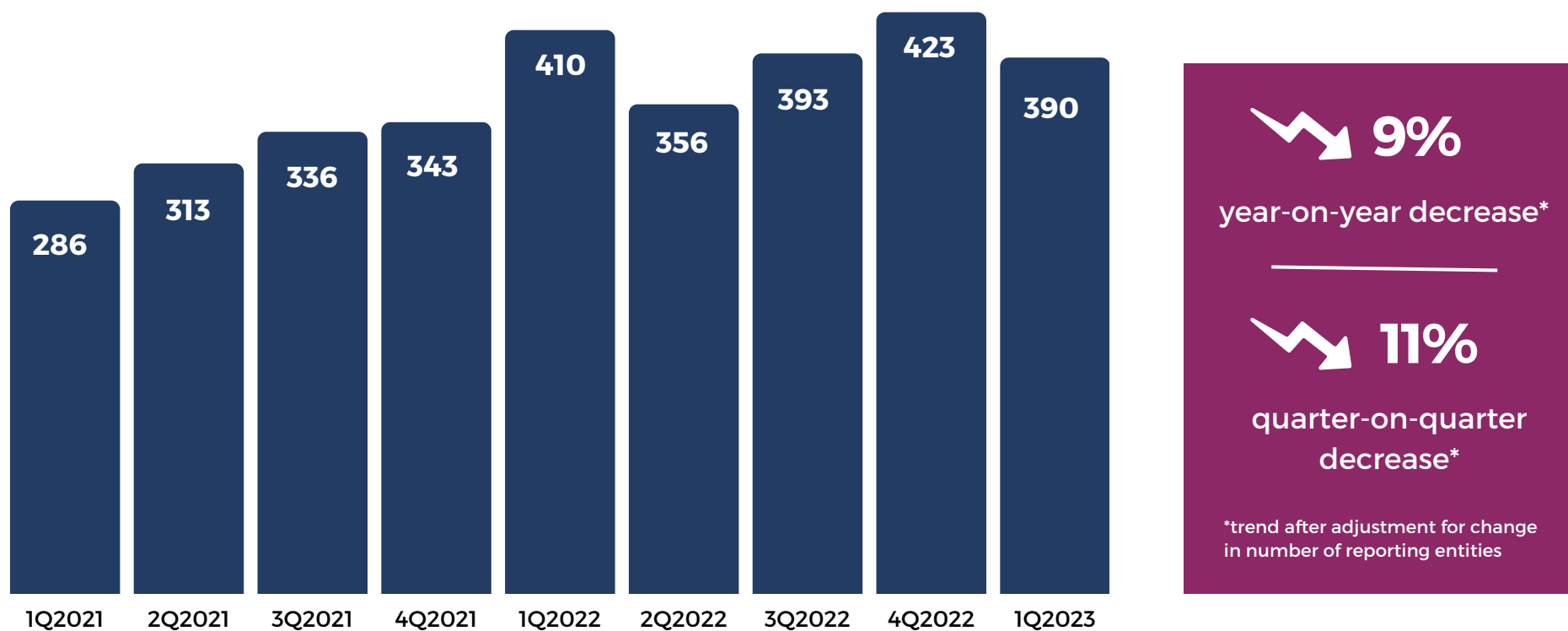
quarter-on-quarter decrease*

*trend after adjustment for change in number of reporting entities

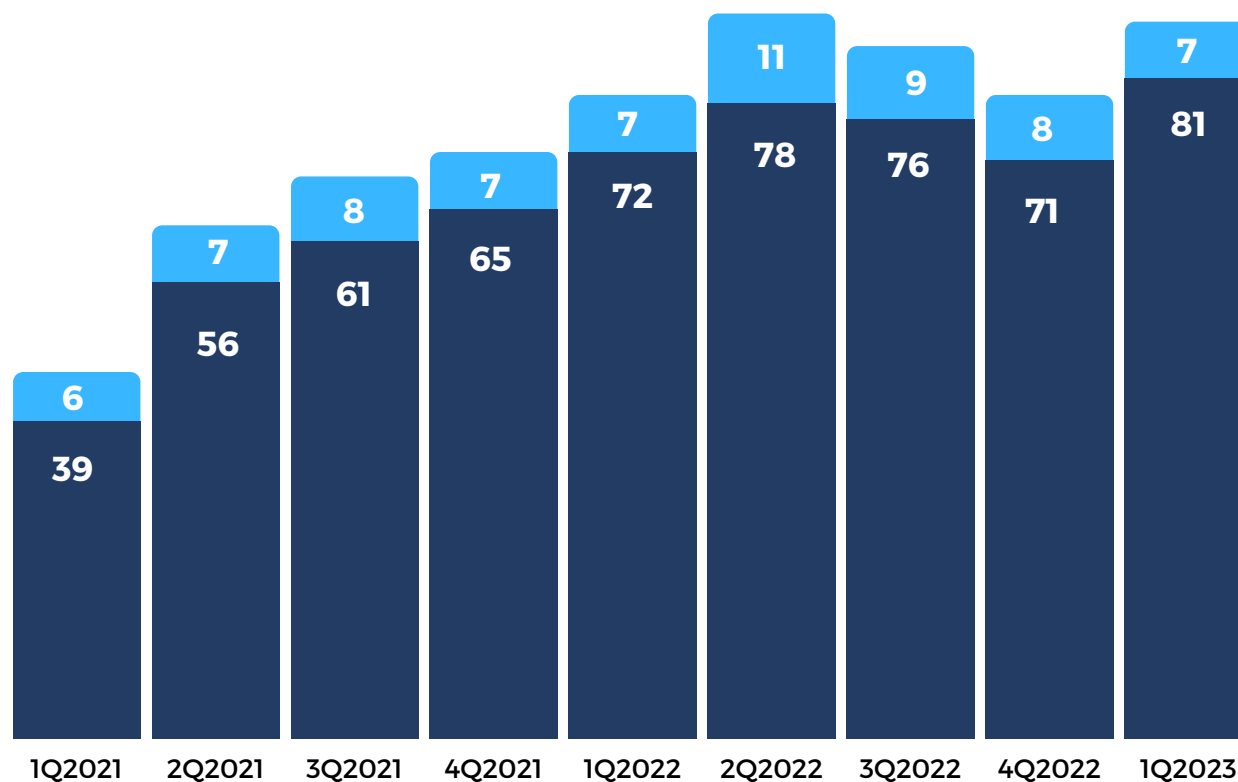
1,7 bn PLN

estimated value of the temporary work market in Poland in 1Q2023

Turnover of PFHR member companies in outsourcing (in millions)



Turnover of PFHR member companies in recruitment services (in millions)

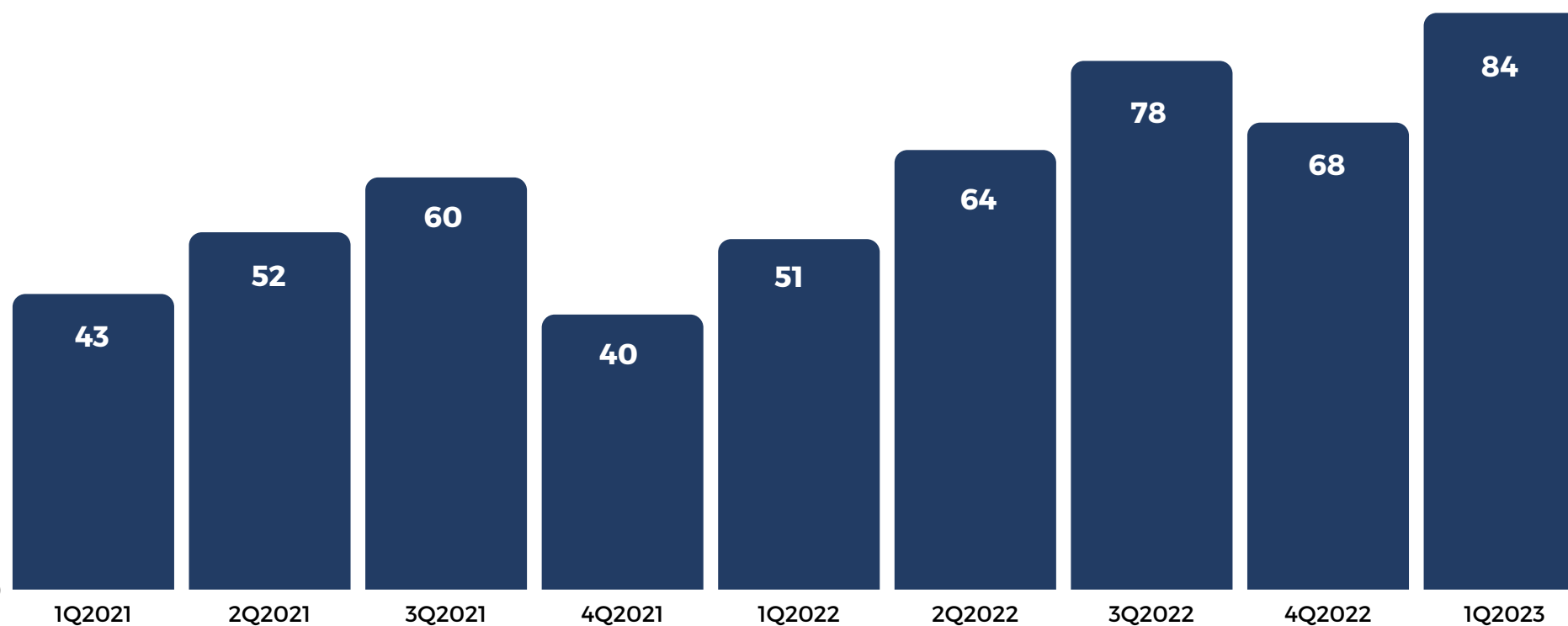


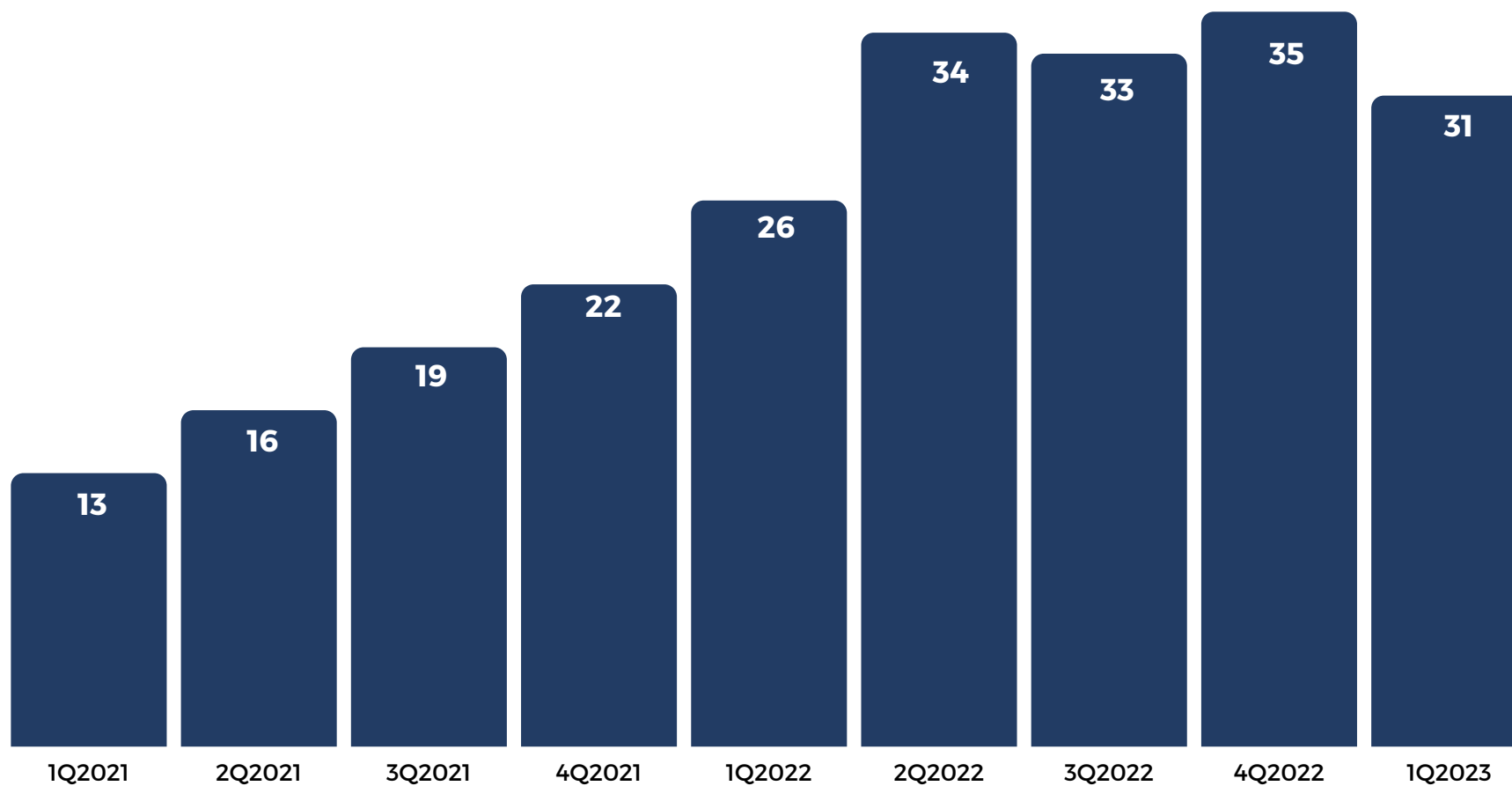
■ recruitments for Polish employers ■ recruitments for foreign employers



Posting of workers

Turnover of PFHR member companies for the posting of workers (in millions)



Turnover of PFHR member companies for the RPO (w millions)

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your tomorrow

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job outsourcing

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NEUMANN
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PageExecutive

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