



THE HR SERVICES MARKET 2Q2023

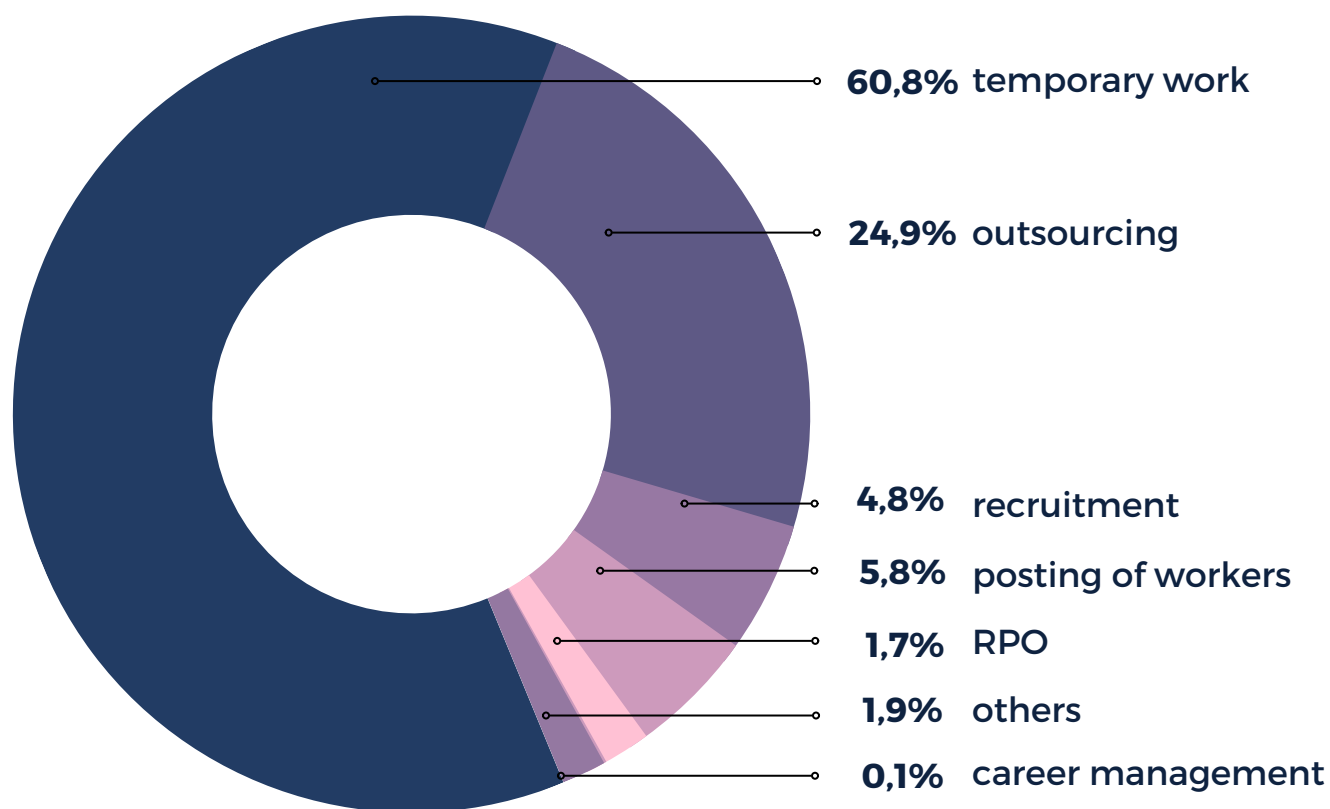




The data presented in the report refers to the results of 29 entities affiliated with the Polish HR Forum (PFHR) achieved in the second quarter of 2023 (2Q2023). As an affiliated entity may be a capital group, the data concerns a total of 68 companies.

The value of the HR services market 2Q2023

Total turnover of member firms by service



1 664 mln PLN

Total turnover of PFHR
members in 2Q2023

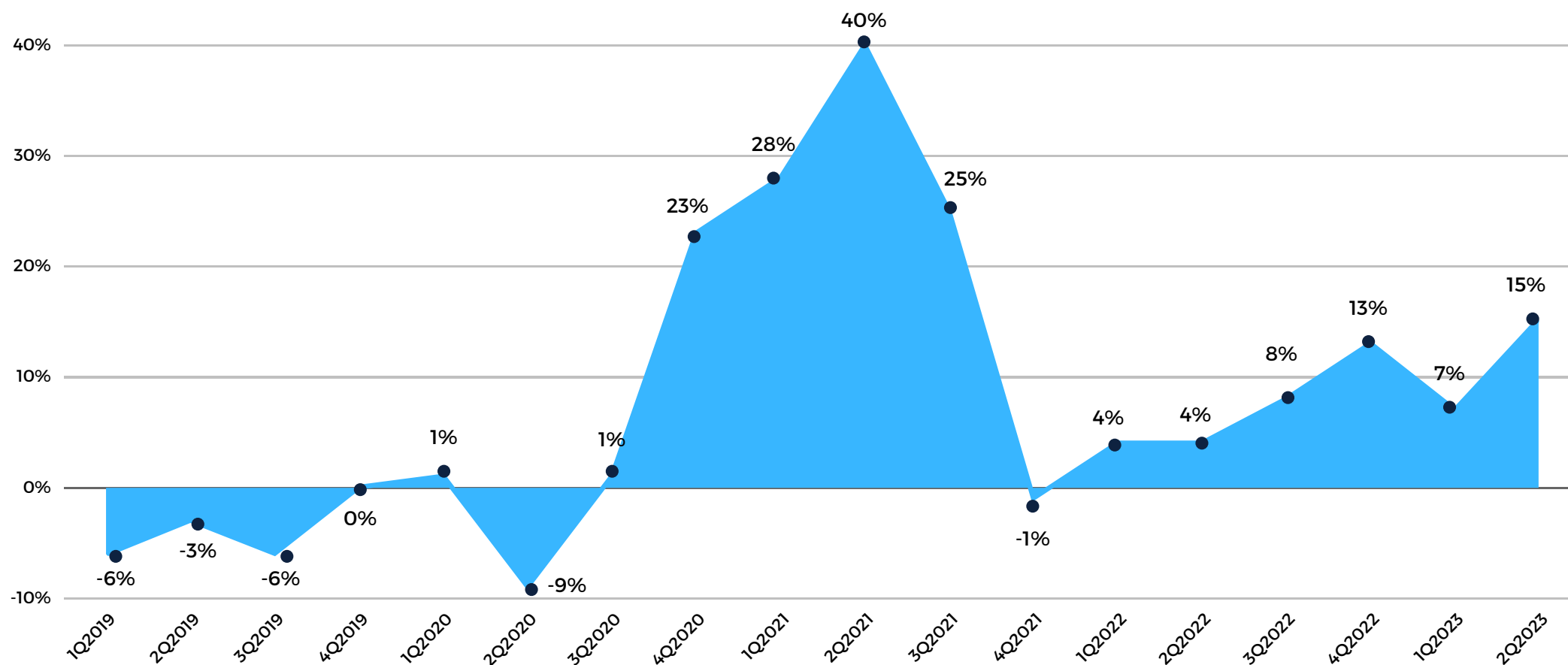
15%

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 2Q2023

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. OTTO Work Force	5. Randstad	5. ManpowerGroup
6. Exact Systems	6. Trenkwalder	6. Antal	6. Devire
7. Contrain	7. Hays	7. ManpowerGroup	7. Antal
8. OTTO Work Force	8. Job Impulse	8. Grupa Adecco	8. Gi Group Holding
9. Trenkwalder	9. Interkadra	9. Kelly Services	9. Interkadra
10. Interkadra	10. Contrain	10. Talent Place	10. People

Ranking of the largest PFHR companies in 2Q2023

Posting of workers

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

RPO

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

International recruitment

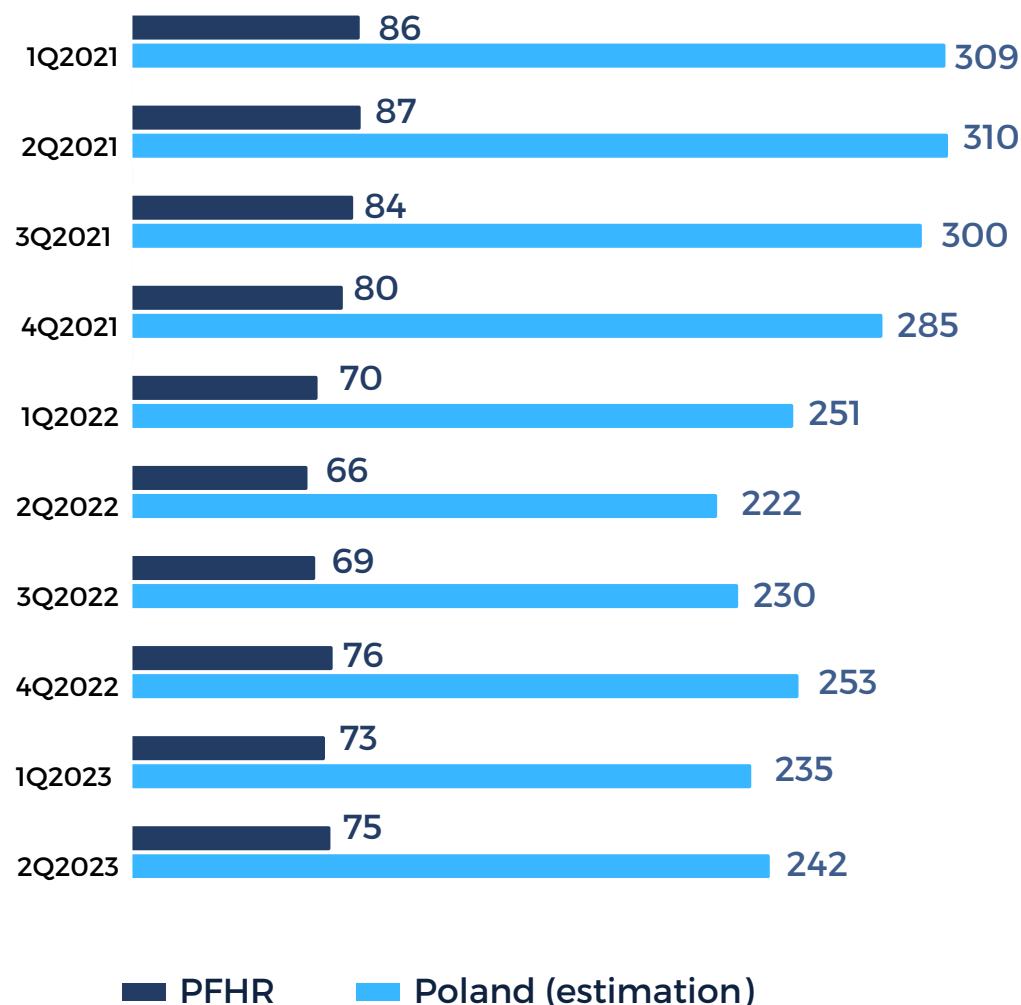
1. ★ OTTO Work Force
2. Michael Page
3. Work Force
4. 24/7 DRIVE
5. Antal
6. Grupa Adecco
7. IPF Group
8. Talent Place
9. Interkadra
10. Orienta

Career management

1. ★ Randstad
2. ManpowerGroup
3. Hays
4. Trenkwalder

Number of temporary workers

Number of temporary workers (in thousands)



 **3%**

year-on-year increase *

*trend after adjustment for change in
number of reporting entities

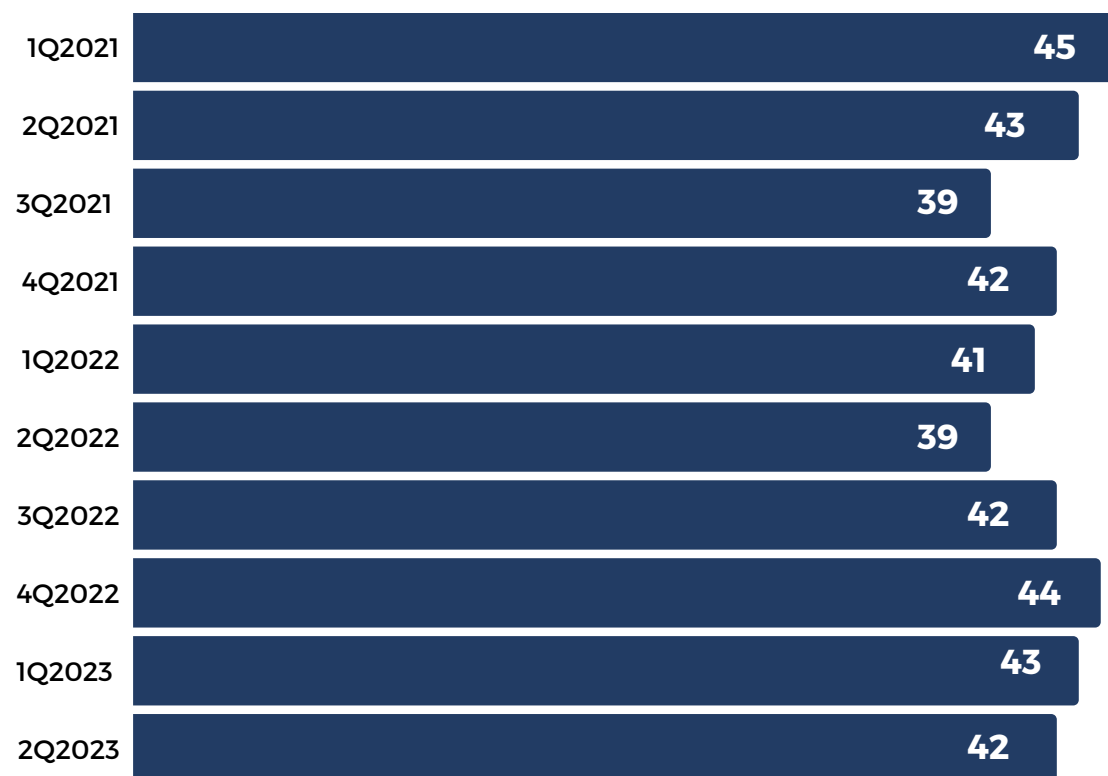


89%

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

Temporary work - FTE

FTE in PFHR - full time equivalent (thous.)



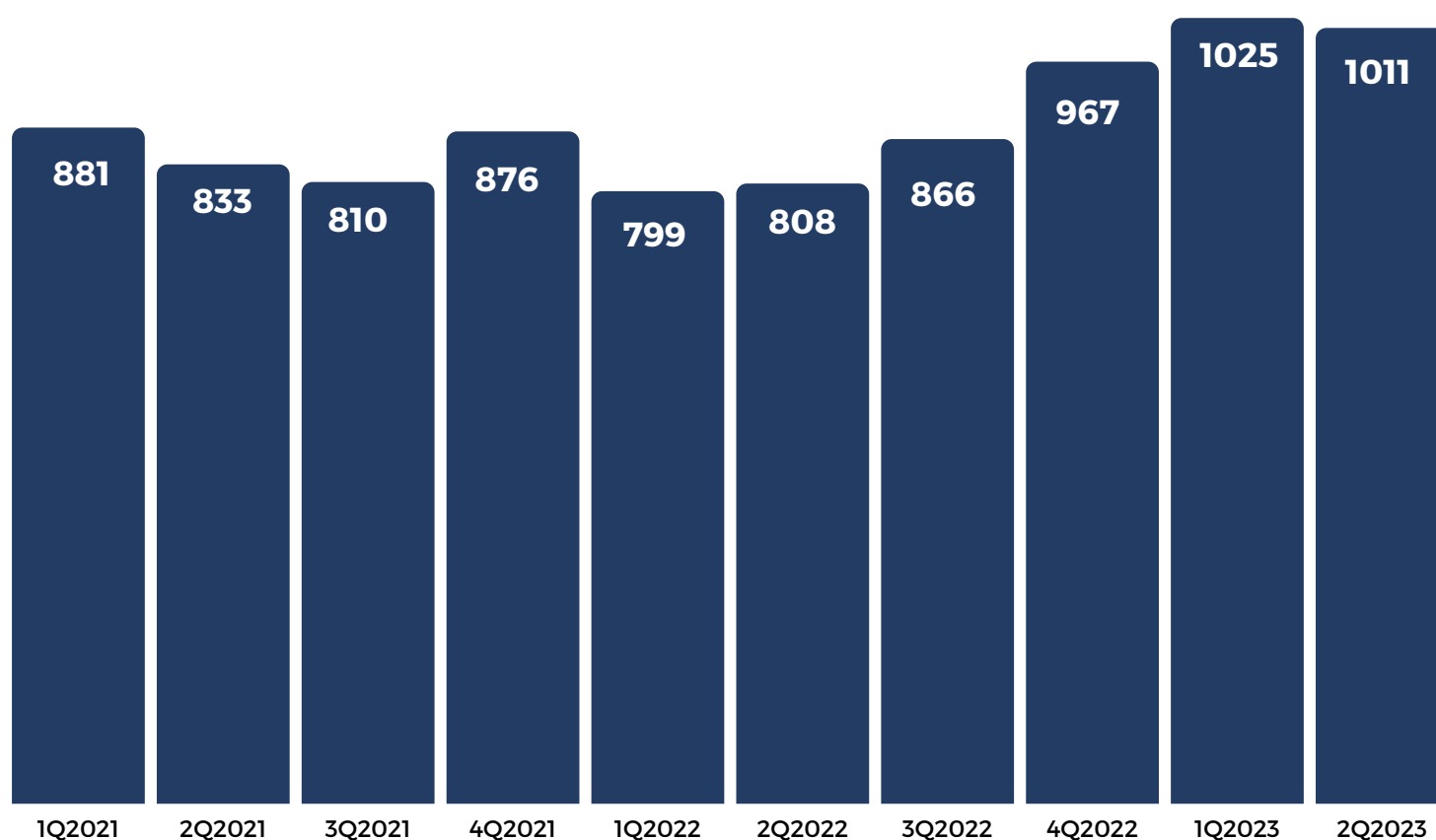
4%

year-on-year decrease*

*trend after adjustment for
change in number of reporting
entities

Value of the temporary work

Temporary work turnover of PFHR member companies (in millions)



 **13%**

year-on-year increase*

*trend after adjustment for change in number of reporting entities

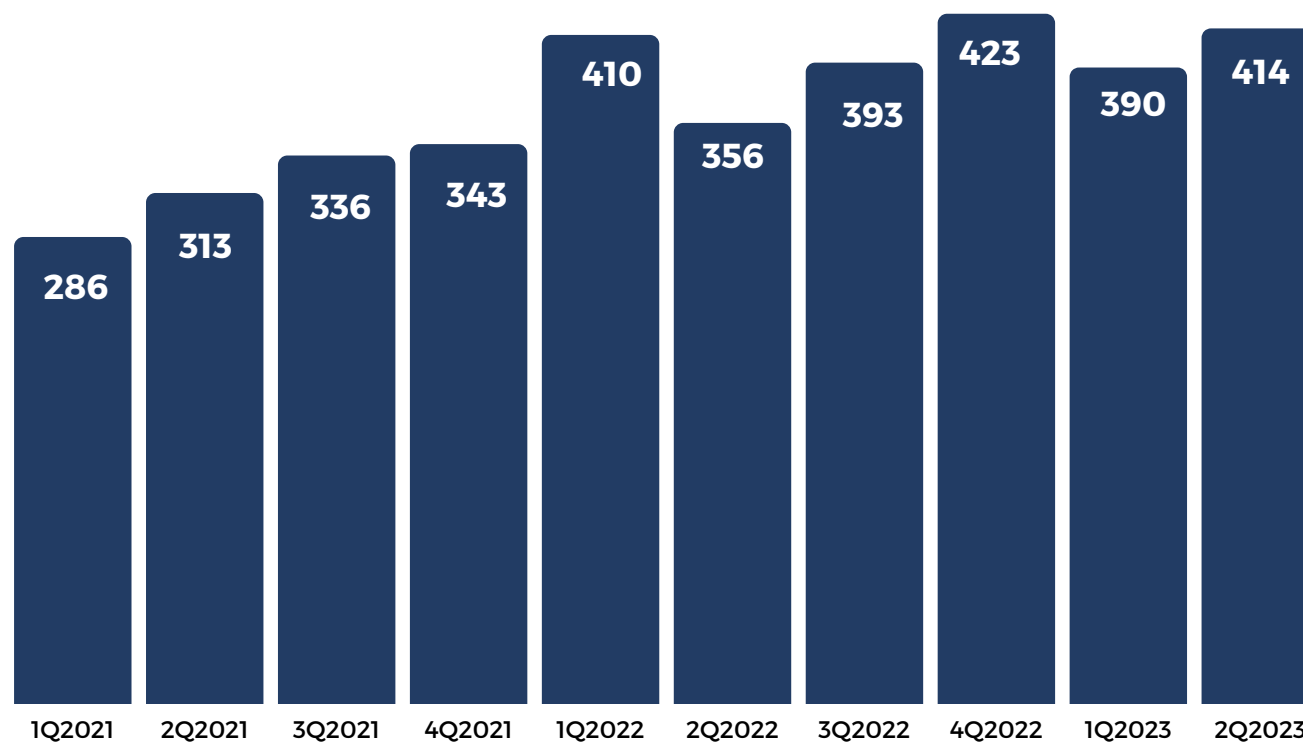
 **1%**

quarter-on-quarter decrease


1,7 mld PLN

estimated value of the temporary work market in Poland in 2Q2023

Turnover of PFHR member companies in outsourcing (in millions)

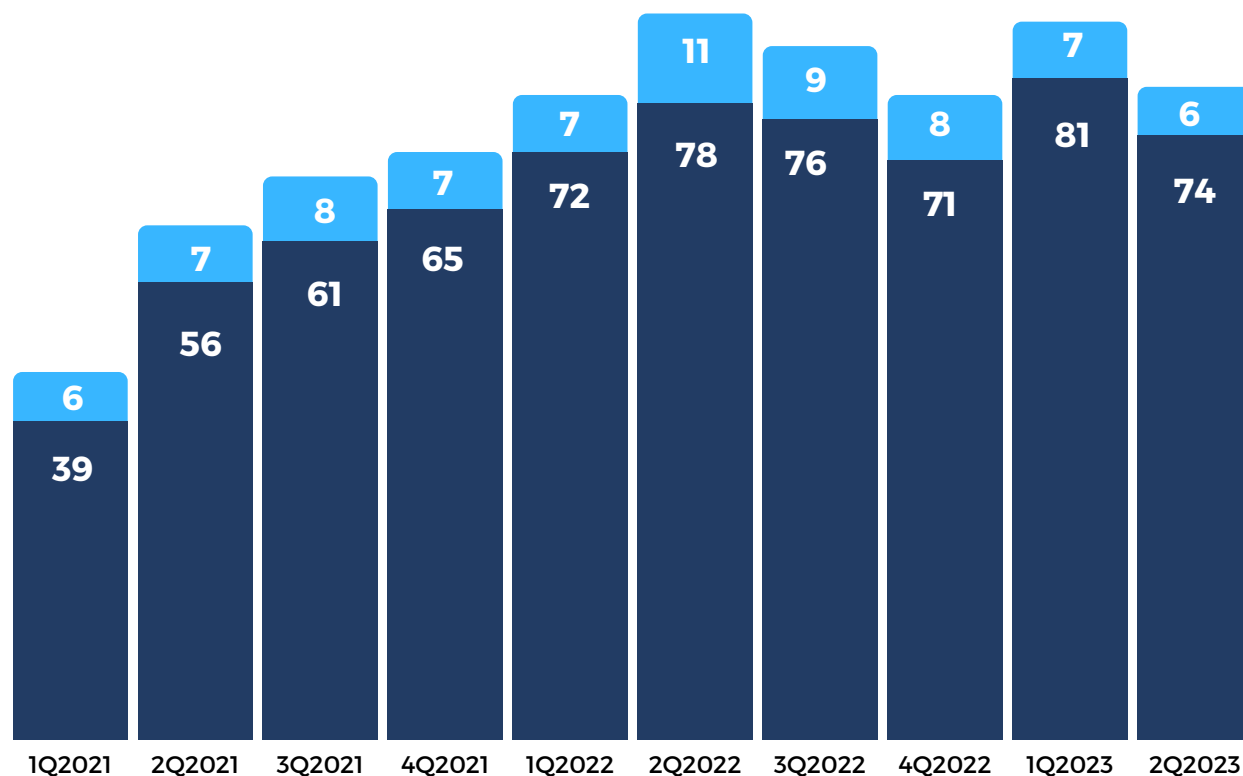


 **12%**
year-on-year increase*

 **6%**
quarter-on-quarter
increase

*trend after adjustment for change
in number of reporting entities

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



recruitments for Polish employers
 recruitments for foreign employers


15%

year-on-year decrease in the value of the recruitment market for Polish employers*

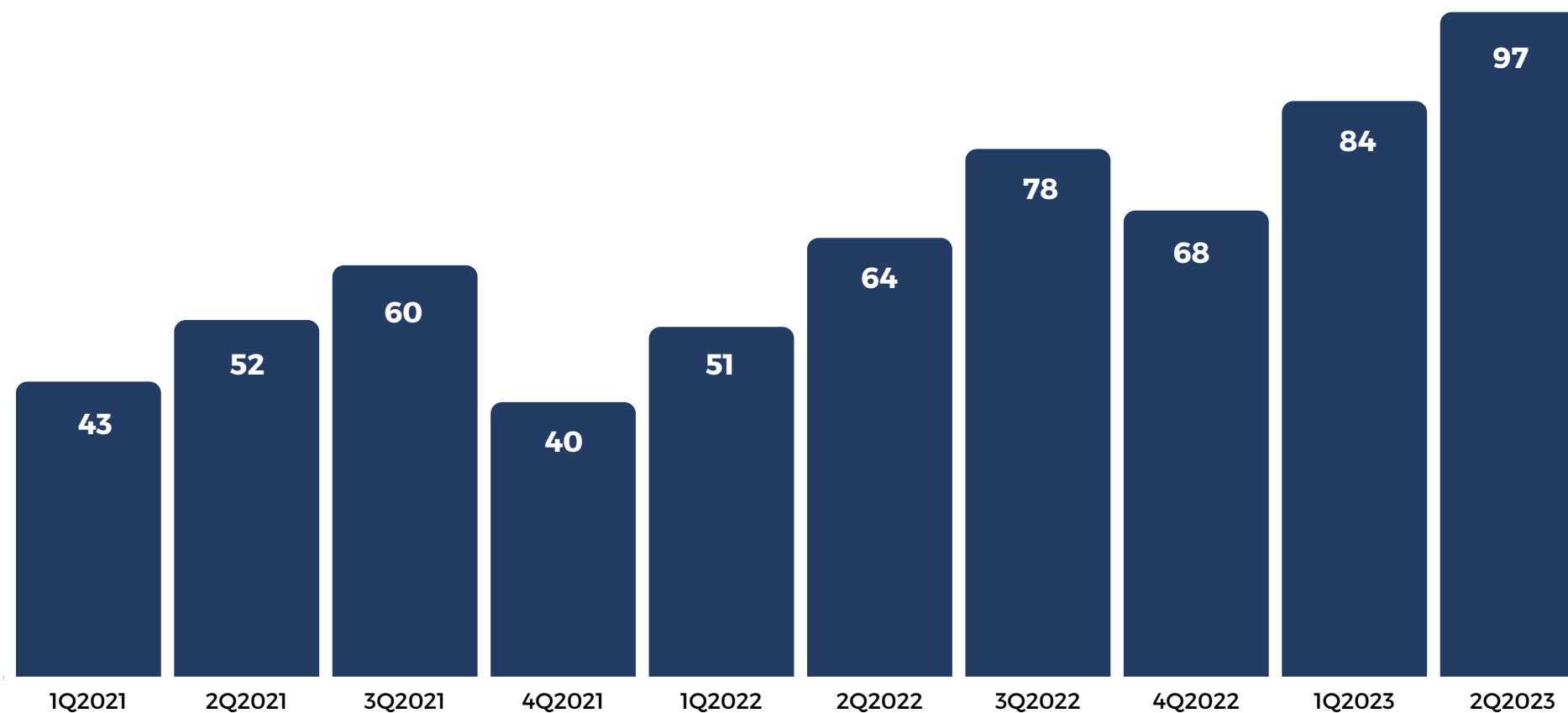

43%

year-on-year decrease in the value of the recruitment market to foreign employers *

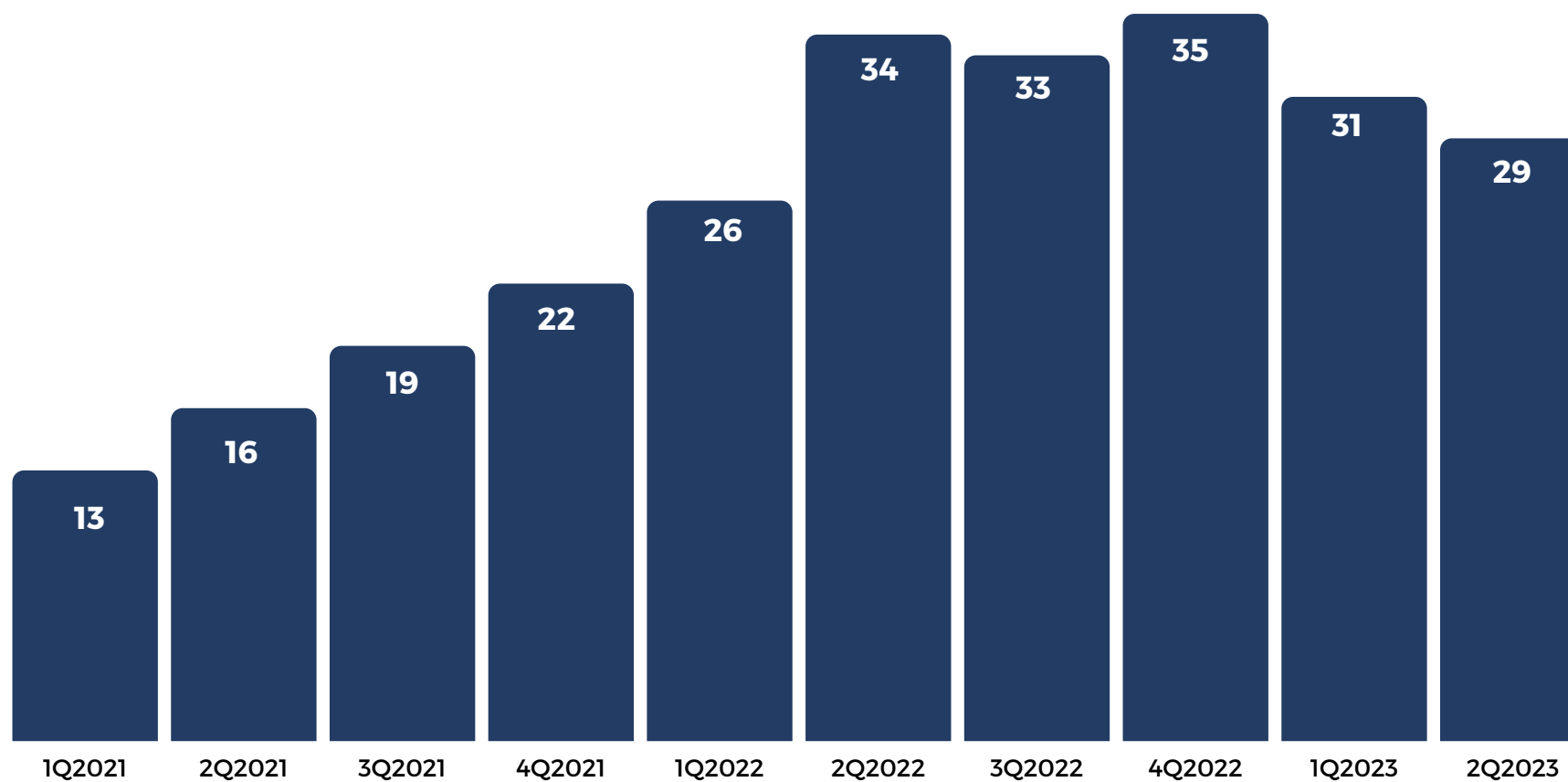
*trend after adjustment for change in number of reporting entities

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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devire.
DIGITAL

derksen
agency

Exact
Systems
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Experis
ManpowerGroup

Flaire

G Group

Gi Group

grafon
recruitment

HAVIER
Doradztwo Personelne

HAYS
Working for
your tomorrow

HAYS
RESPONSE

HAYS
Talent Solutions
Helping organisations thrive

IDES
your partner in HR

interkadra
by

ipf group

IPF MEDICAL
recruitment

JOBHOUSE

job abroad

job impulse

job outsourcing

Kelly

Manpower

ManpowerGroup

Michael Page

NEUMANN

Oriente
Lead Your Future

OTTO
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PageOutsourcing

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working together

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