



# The agency work industry around the world

**2011 Edition**

(based on figures available for 2009)



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ECONOMIC REPORT

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(based on figures available for 2009)

# Introduction

In 2009, the global agency work industry continued to feel the impact of the economic downturn that started in the USA in 2007, and quickly spread to the rest of the world. Certain countries were hit harder than others, while some continued to grow. The trends in this report go some way to showing that the openness and the socio-economic fabric of national economies and the flexibility of their labour markets account for the difference across countries.

Overall, the total number of agency workers worldwide fell 6% in 2009, compared to 2008, amounting to nearly 9 million full-time equivalents on a daily basis. In parallel, global total annual sales revenues also fell by 16%, amounting to €203 billion. The negative

impact of the economic crisis on the labour market in general, and the agency work sector in particular, began in spring 2008 and accelerated in 2009. This report goes on to begin to describe the strong recovery made by the agency work sector in the first half of 2010.

In 2009, some markets such as Brazil and South Africa continued to grow, boosted by their rapidly expanding economies, which were only temporarily set back by the crisis. However, most mature markets continued the declines which began in the previous year.

Agency work plays - and still has the potential to play further - a valuable role in easing transitions within and into the labour market. Agency work creates

jobs that would not otherwise exist, enhancing companies' competitiveness and workers' employability, thereby promoting a labour market that corresponds better to peoples' - and companies' - needs and aspirations.

In global markets emerging from crisis, the agency work industry's capacity to anticipate and match labour market needs with the required skills is even more crucial, as agencies serve as impresarios for workers, immediately identifying job vacancies, providing training, and facilitating the transition from unemployment to work, from one assignment to the next. In addition, agency work prepared the ground for a job-creating economic upturn, helping companies face the ongoing global competitive pressure, increasing labour

market participation, and furthermore, accelerating and increasing the number of jobs created as the economy recovers.

Now more than ever, the agency work industry plays a key role in improving the functioning of the labour market, by facilitating the match between supply and demand of labour, by securing upwards transitions for agency workers, and by providing more work opportunities for more people.



# Content

1.	The players	11
2.	Agency workers in numbers	19
3.	The profile of agency workers	28
	a. General trends	
	b. Agency workers' motives & satisfaction	
4.	Agency work's contribution to a better functioning labour market	46
	a. Transitions	
	b. Job creation	
	c. Inclusion & diversity	
5.	Companies' rationale to use agency work	65
6.	Agency work and the economic recovery	72

# The key facts & figures

## The players

- There are 72,000 private employment agencies and 169,000 branches worldwide, employing 741,000 internal staff
- In 2009 the total annual sales revenues of the top 10 private employment agencies worldwide accounted for 29% of the total agency work market
- In 2009 the global total annual sales revenues amounted to €203 billion, down 16% from 2008
- Japan is the world leader with 24% of total annual sales. The USA represents 22% of the global agency work market, followed by the UK at 12%
- Europe is the leading regional entity by total annual sales revenues, accounting for 40% of global total annual sales revenues

## Agency workers in numbers

- In 2009 nearly 9 million agency workers in full-time equivalents were employed by private employment agencies across the globe, down 6% from 2008
- The agency work penetration rate is 1.7% in Japan and 1.5% in Europe and 1.3% in the USA
- The average number of hours worked by an agency worker during one year is nearly half as much as a full time worker
- Most agency work assignments are more than one month long

## The profile of agency workers

- Nearly three in five agency workers are aged less than 30
- Three in four agency workers have at best finished their secondary education
- A significant proportion of agency workers do not seek a permanent employment
- The motive to work via an agency is usually to find a permanent job



## The contribution of agency work to a better functioning labour market

- Agency work facilitates transitions in the labour market
- Agency work contributes to reducing unemployment especially by serving as a stepping-stone into the labour market
- The higher the agency work penetration rate the lower the level of undeclared work
- Private employment agencies contribute to upgrading the skills of agency workers
- Vulnerable target groups use agency work as a means of entering the labour market

## Companies' rationale to use agency work

- Agency work improves companies' competitiveness
- Agency work is not a substitute for permanent employment
- Reasons to use agency work are generally to meet peaks in demand or to fill in for absent employees

## Agency work and the economic recovery

- Agency work is a bellwether of the economic situation
- As a cyclical business - and a forecasting indicator - agency work has suffered from the economic crisis, but agency workers have been the first ones to be hired when the economy recovers
- Agency work limits the risk and duration of unemployment
- The private employment agency industry has rebounded sharply since the recession

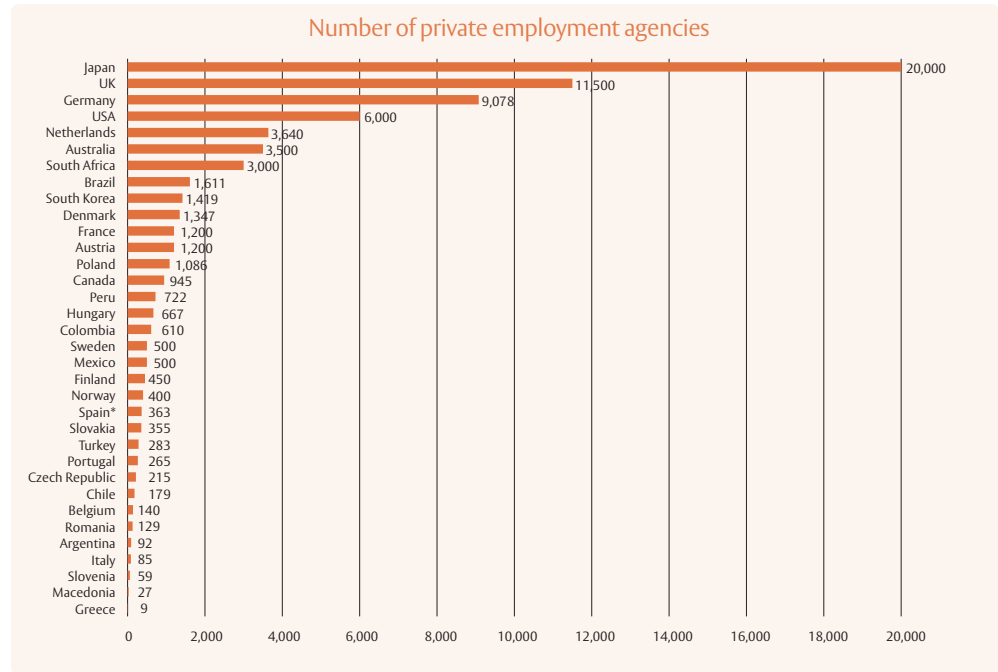


# 1. The players

- There are 72,000 private employment agencies [PrEAs] worldwide, with 169,000 branches and 741,000 persons as internal staff
- Total annual sales revenues for the top 10 PrEAs account for 29% of the global agency work market
- Global total annual sales revenues amounted to €203 billion in 2009
- Japan is the world leader with 24% of total annual sales. The USA represents 22% of the global agency work market, followed by the UK with 12%
- Europe is the leading regional entity by total annual sales revenues, accounting for 40% of global total annual sales revenues

# There are 72,000 private employment agencies...

From 2008 to 2009 the number of private employment agencies [PrEAs] increased by 1% to reach 72,000. Europe accounts for 48% of all PrEAs, the Asia/Pacific region for 34%, North America for 8% and Africa for 4%. Japan, Germany and the UK are the top three countries in terms of number of PrEAs, accounting collectively for 56% of all agencies worldwide. As recognised by the ILO: *“Private employment agencies play an important role in the functioning of contemporary labour markets. For the past three decades, the increasing need to provide workers and services to a rapidly growing and flexible labour market has led to the spectacular development of these agencies.”\*\**



\* figures for 2008

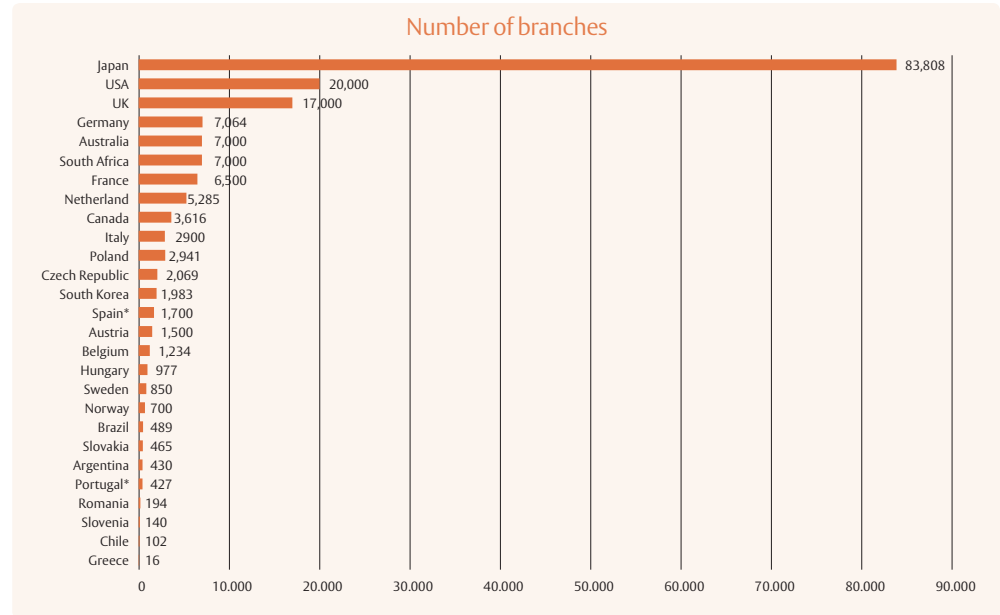
\*\* ILO - Private employment agencies, temporary agency workers and their contribution to the labour market | 2009

## ... with 169,000 branches worldwide

THE PLAYERS

From 2008 to 2009 the number of branches increased by 1% to attain 169,000; the Asia/Pacific region accounting for 55%, Europe for 28%, and North America for 12%. Japan, the USA, and the UK are the top three countries by number of branches, accounting together for 72% of all branches worldwide.

The “branch to PrEA” ratio varies greatly from country to country, from a staggering 34.5 branches per PrEA in Italy to fewer than one per private employment agency in Germany. This difference can be explained by the very high concentration of the Italian agency work market, characterised by a small number of large companies with an extensive network. This is in contrast to highly fragmented markets, such as Germany, characterised by a large number of PrEAs, often operating from a



\* figures for 2008

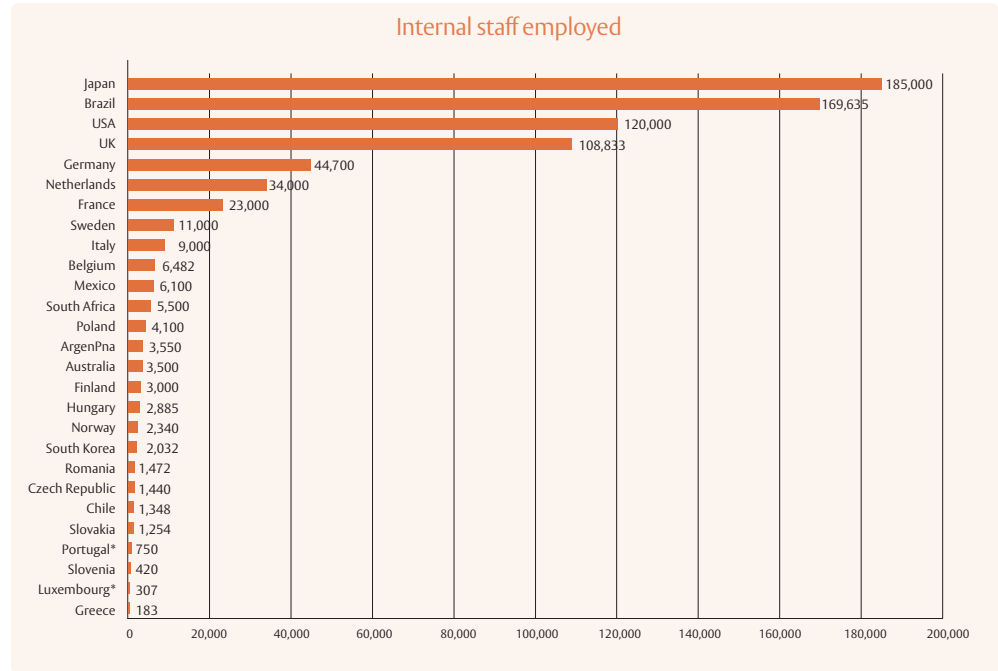
single local branch (some German companies operate without any branches, while there is also a number

of dormant, non active agencies influencing this number). The global average is 2.3 branches per PrEA.

# 741,000 people were employed as internal staff by PrEAs in 2009

From 2008 to 2009 the number of internal staff [HR consultants and back-office people working in branches] decreased by 10% to reach 741,000. Europe accounts for 30%, the Asia/Pacific region for 26%, and South America for 25%. The top three countries in terms of internal staff are Japan, Brazil, and the USA, accounting together for 65% of all internal staff worldwide.

The global average is 4 people employed as internal staff per branch, and 10 per PrEA. This illustrates that the agency work industry is still mostly composed of small and medium-sized companies, despite the presence of several large multinationals operating worldwide.

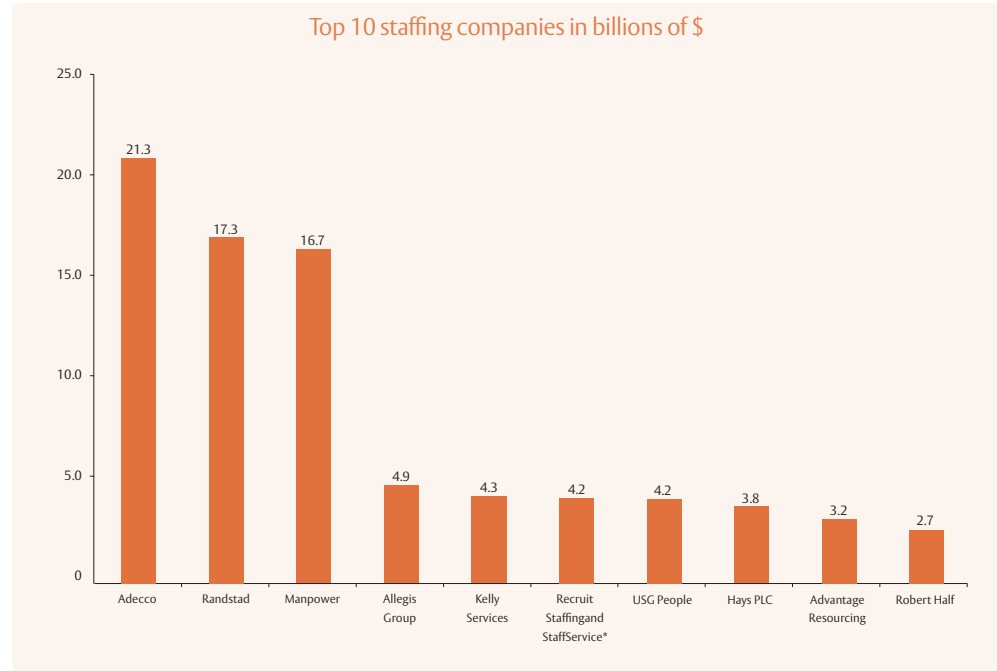


\* figures for 2008

# The top 10 PrEAs worldwide accounted for 29% of global annual sales revenues in 2009

THE PLAYERS

In 2009 some of the main global players continued to feel the impact of the economic crisis. Adecco, with \$21.3 billion in total annual sales revenues, remains the market leader. Randstad is the second largest PrEA with \$17.3 billion, followed by Manpower with \$16.7 billion.



Source: Staffing Industry Analysts 2009 - [www.staffingindustry.com](http://www.staffingindustry.com)  
\*Consolidated figures for Recruit Staffing and Staff Service

# Global total annual sales revenues totaled €203 billion

In 2009, the global total annual sales revenues for the agency work industry amounted to €203 billion, a decline of 16% compared to 2008, reflecting the ongoing impact of the crisis on major economies, such as the USA and the UK.



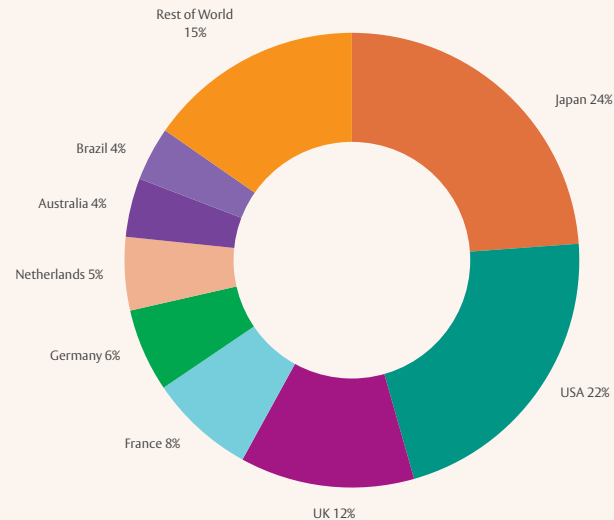
Source: Ciett national federations



# In 2009 Japan and the USA are global agency work market leaders by total annual sales revenues

In 2009, Japan is the world leader with 24% of global annual sales. The USA represents 22% of the global agency work market. The UK remains the third largest market worldwide with 12% of global total annual sales revenues. Europe accounts for 40% of global total annual sales revenues, Asia/Pacific for 35%, and North America for 22%.

Agency work sales revenues split per country



Source: Ciett national federations

## Japan, the USA, and the UK are the three largest agency work markets in 2009

Japan, the USA, and the UK together account for 52% of PrEAs worldwide, 72% of branches, 54% of internal staff, 61% of total annual sales revenues, and 47% of agency workers in full-time equivalents.

The UK has the lowest “branch to PrEA ratio” and the highest “internal staff to branch ratio”. This can be explained by the high level of fragmentation of the UK agency work market, characterised by a majority of small private employment agencies that operate locally. Japan has the lowest “agency worker to branch” and “agency worker to internal staff” ratios, and the USA the largest. These figures must be assessed carefully, bearing in mind that there might be a significant amount of dormant agencies and branches in Japan.

Comparison of the 3 largest agency work markets in the world

	Japan	USA	UK
Number of PrEAs	20,000	6,000	11,500
Number of branches	83,808	20,000	17,000
Number of agency workers	1,098,191	2,010,000	1,068,197
Number of internal staff	185,000	120,000	95,865
Branch to PrEA ratio	4.2	3.3	1.5
Internal staff to branch ratio	3	6	5.6
Agency worker to branch ratio	13	100.5	6.3
Agency worker to internal staff ratio	6	16.8	11.1
Country's share of total global annual sales revenues	24%	22%	12%
AW penetration rate	1.7%	1.3%	3.6%

This difference can also be partially explained by the fact that Japanese agency workers work an exceptional

76% of the average annual hours worked by a Japanese employee with a full-time open-ended contract.

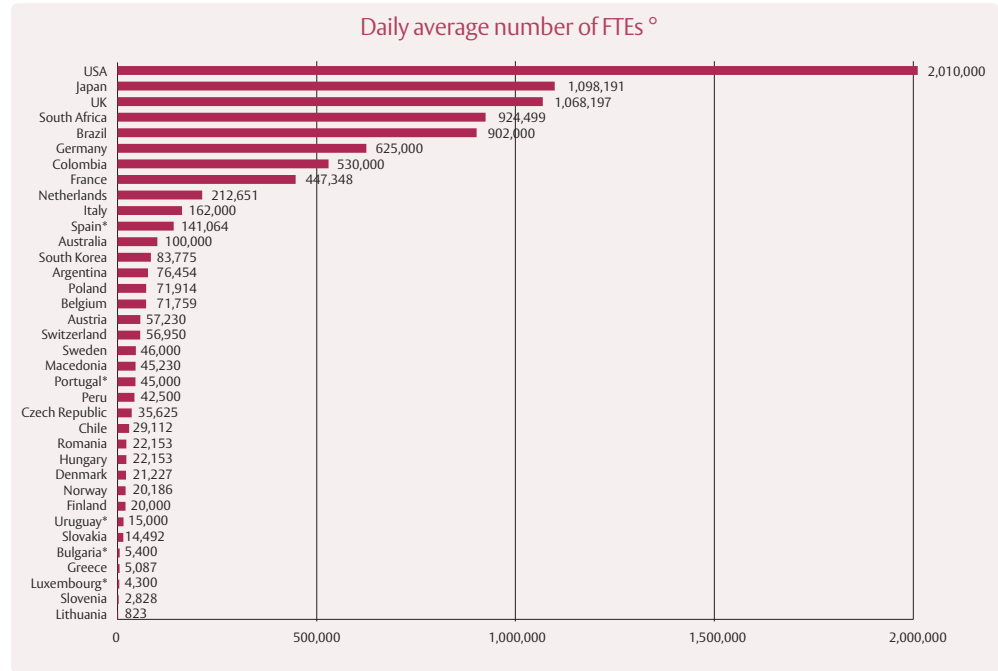
## 2. Agency workers in numbers

- nearly 9 million agency workers in full-time equivalents were employed in 2009.
- The number of agency workers has risen by over 3.8 million since 1999.
- In 2009 the European average penetration rate of agency work was 1.5% and the South American average 0.8%.
- In 2009 the Japanese and American agency work penetration rates were respectively 1.7% and 1.3%.
- Agency workers work nearly half as much as full-time permanent employees.
- Most agency work assignments are more than one month long.

# 9 million agency workers were employed in 2009

In 2009 the total number of agency workers worldwide amounted to nearly 9 million in full-time equivalents, a decrease of 6% compared to 2008. Europe accounts for 34%, North America for 23%, and the Asia/Pacific region for 14%.

The USA employs nearly as many agency workers in full-time equivalents [2.01 million] than the second and third biggest suppliers of agency workers combined, respectively Japan [1.1 million], and the UK [1.07 million]. Together, the USA, Japan, and the UK account for 47% of all agency workers assigned worldwide. South Africa is the fourth largest market in the world with 924,499 agency workers in full-time equivalents, ahead of Brazil [902,000], Germany [625,000] and Colombia [550,000].



° Full-time equivalents defined as the total number of hours worked by all agency workers in a country over a period of one year divided by the average number of hours worked over a period of one year by a worker with a full-time job with an open-ended contract  
\* figures for 2008

# The number of agency workers has increased by 3.8 million since 1999

AGENCY WORKERS  
IN NUMBERS

The number of agency workers worldwide increased from close to 5.2 million full-time equivalents in 1999 to nearly 9 million in 2009.

In the last ten years, the number of agency workers in Europe has greatly increased, partially as a result of the progressive liberalisation of certain tightly regulated labour markets, notably in Italy, Germany, and the Nordic countries, and the opening up of new markets in Central and Eastern Europe.

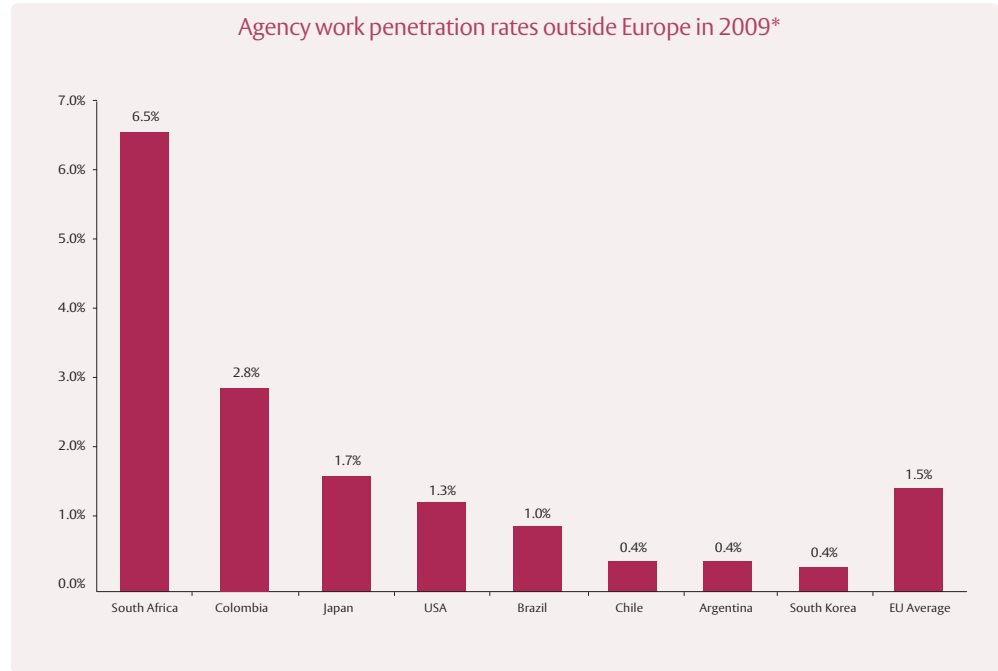
Outside Europe the number of agency workers has nearly doubled between 1999 and 2009, on account of the gradual deregulation of the Japanese labour market, and the advent of emerging markets, such as Brazil and South Africa, on the global scene.

		Number of agency workers [in daily FTEs / 1.000]											
		1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
EUROPE	Austria	21	24	30	33	31	38	44	47	59	67	68	57
	Belgium	60	63	71	68	66	66	73	78	88	95	92	72
	Bulgaria	na	na	na	na	na	na	na	na	na	na	na	5
	Czech Republic	na	na	na	na	na	na	na	na	na	na	na	35
	Denmark	7	7	8	10	10	11	13	17	21	17	21	18
	Finland	9	8	9	11	11	12	14	16	18	28	32	20
	France	458	515	604	602	570	555	570	586	603	638	604	447
	Germany	246	276	328	341	318	330	385	444	580	715	760	625
	Greece	na	na	na	na	na	na	na	na	na	na	na	8
	Hungary	ns	ns	ns	ns	30	39	53	54	55	55*	55*	22
	Ireland	9	10	25	25	25	25	25	25	30	35	35*	35*
	Italy	10	26	69	67	82	132	154	157	184	222	225	162
	Lithuania	na	na	na	na	na	na	na	na	na	na	na	na
	Luxembourg	2	3	4	4	4	4	4	4	5	5	4	4
	Macedonia	na	na	na	na	na	na	na	na	2	2*	2*	5
	Netherlands	180	186	183	178	169	154	157	176	207	233	242	213
	Norway	11	11	11	12	11	10	12	15	24	25	26	20
	Poland	ns	ns	ns	ns	ns	19	25	27	35	60	90	72
	Portugal	33	45	45	45	45	45	45	45	45	45	45	45
	Romania	na	na	na	na	na	na	na	na	na	na	na	30
Slovakia	ns	ns	ns	ns	ns	ns	11	na	na	na	na	14	
Slovenia	na	na	na	na	na	na	na	na	na	na	na	3	
Spain	110	133	133	126	123	123	124	130	141	160	141	141*	
Sweden	18	24	42	38	37	29	30	32	37	59	59	46	
Switzerland	30	34	39	38	37	36	41	49	61	70	69	57	
UK	696	761	1,027	1,027	1,036	1,111	1,175	1,219	1,265	1,378	1,220	1,068	
	<b>Subtotal Europe</b>	<b>1,900</b>	<b>2,126</b>	<b>2,629</b>	<b>2,625</b>	<b>2,605</b>	<b>2,739</b>	<b>2,955</b>	<b>3,120</b>	<b>3,460</b>	<b>3,917</b>	<b>3,885</b>	<b>3,214</b>
REST OF WORLD	Argentina	47	46	48	47	34	54	70	81	88	96	96	76
	Australia	na	na	na	na	na	na	na	na	na	na	na	100
	Brazil	na	na	na	na	na	na	na	na	800	859	876	902
	Chile	na	na	na	na	na	na	na	na	86	33	30	29
	Colombia	na	na	na	na	na	na	na	na	na	na	na	550
	Japan	307	395	537	612	693	743	890	1,060	1,220	1,330	1,400	1,098
	Mexico	na	na	na	na	na	na	na	na	na	25	24	24*
	Peru	na	na	na	na	na	na	na	na	na	na	na	43
	South Africa	ns	ns	ns	ns	ns	ns	ns	300	300	300	500	924
	South Korea	ns	ns	ns	ns	ns	ns	50	57	66	75	78	84
	Uruguay	na	na	na	na	na	na	na	na	na	na	na	15
	USA	2,530	2,600	2,700	2,300	2,160	2,380	2,670	2,910	2,960	2,960	2,660	2,010
	<b>Subtotal Rest of World</b>	<b>2,884</b>	<b>3,041</b>	<b>3,285</b>	<b>2,959</b>	<b>2,887</b>	<b>3,177</b>	<b>3,680</b>	<b>4,408</b>	<b>5,520</b>	<b>5,678</b>	<b>5,679</b>	<b>5,775</b>
	<b>TOTAL WORLD</b>	<b>4,784</b>	<b>5,167</b>	<b>5,914</b>	<b>5,584</b>	<b>5,492</b>	<b>5,916</b>	<b>6,635</b>	<b>7,528</b>	<b>8,980</b>	<b>9,595</b>	<b>9,564</b>	<b>8,989</b>

ns = non significant; nlr = not legally recognised; na = not available; \* = estimated

## Outside Europe agency work penetration rates vary widely

Agency work penetration rates are determined by the level of maturity of the market in which they evolve. Mature agency work markets are characterised by high penetration rates, indicating a potent blend of large user bases, strong economic growth, and generally relevantly regulated markets. At a mere 1.1% of the total regional active working population, the relatively low penetration rate of agency work in South American countries reveals the region's considerable potential for growth.



\* Defined as the number of full-time equivalents - as supplied by Ciett National Federations - divided by the total active working population - as published by the ILO

# The average European agency work penetration dipped from 2007 to 2009

In Europe, the level of regulation and degree of economic development explain the differences in pace of growth of the agency work industry. Recently, countries such as Germany and Poland have revealed their potential, but each for very different reasons: Germany as a heavily-industrialised economy, slowly freeing itself of very strict regulatory measures, and Poland as a budding regional leader, rapidly catching up its Western European counterparts. The steady growth from 1996 to 2007 halted abruptly in 2008 and continued its decline with a penetration rate drop of 0.2% across Europe in 2009.

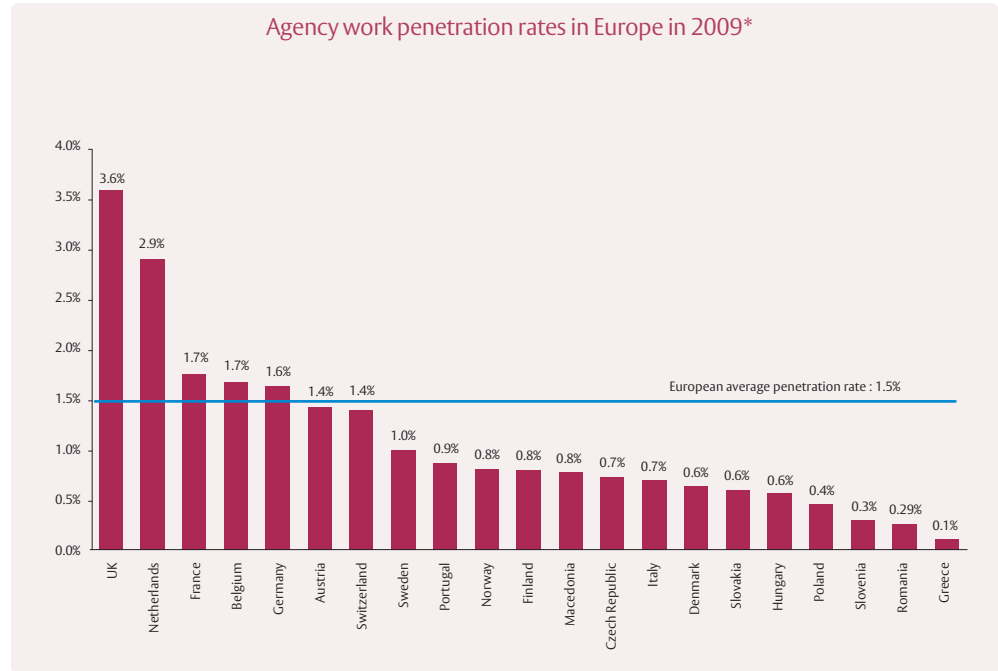
Agency work penetration rates in Europe since 1998

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Austria	0.6%	0.7%	0.8%	0.9%	0.8%	1.0%	1.2%	1.2%	1.5%	1.7%	2.0%	1.4%
Belgium	1.6%	1.6%	1.7%	1.7%	1.6%	1.6%	1.8%	1.9%	2.1%	2.2%	2.1%	1.7%
Bulgaria	na	na	na	na	na	na	na	na	na	na	0.2%	na
Czech Republic	na	na	na	na	na	na	na	na	na	na	0.7%	0.7%
Denmark	0.3%	0.3%	0.3%	0.4%	0.4%	0.4%	0.5%	0.6%	0.8%	0.6%	0.8%	0.6%
Finland	0.4%	0.3%	0.4%	0.5%	0.5%	0.5%	0.6%	0.7%	0.7%	1.1%	1.3%	0.8%
France	2.1%	2.3%	2.6%	2.5%	2.4%	2.3%	2.4%	2.4%	2.4%	2.5%	2.3%	1.7%
Germany	0.6%	0.7%	0.8%	0.8%	0.7%	0.8%	0.9%	1.0%	1.3%	1.6%	2.0%	1.6%
Greece	na	na	na	na	na	na	na	na	na	0.2%	0.2%	0.1%
Hungary	ns	ns	ns	ns	0.8%	1.0%	1.4%	1.4%	1.4%	1.4%	1.4%	0.6%
Ireland	0.6%	0.6%	1.5%	1.5%	1.4%	1.4%	1.4%	1.3%	1.5%	1.7%	1.7%	na
Italy	0.0%	0.1%	0.3%	0.3%	0.4%	0.6%	0.7%	0.7%	0.7%	1.0%	0.9%	0.7%
Luxembourg	1.2%	1.7%	1.9%	2.0%	2.2%	2.3%	2.1%	2.3%	2.4%	2.4%	2.0%	na
Netherlands	2.4%	2.5%	2.3%	2.2%	2.1%	1.9%	1.9%	2.2%	2.5%	2.8%	2.9%	2.5%
Norway	0.5%	0.5%	0.5%	0.5%	0.5%	0.4%	0.5%	0.7%	1.0%	1.0%	1.0%	0.8%
Poland	ns	ns	ns	ns	ns	0.1%	0.2%	0.2%	0.3%	0.4%	0.6%	0.3%
Portugal	0.7%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	na
Romania	na	na	na	na	na	na	na	na	na	na	0.3%	0.2%
Slovakia	na	na	na	na	na	na	na	na	na	na	0.6%	0.6%
Slovenia	na	na	na	na	na	na	na	na	na	na	0.3%	0.3%
Spain	0.8%	0.9%	0.9%	0.8%	0.7%	0.7%	0.7%	0.7%	0.7%	0.8%	0.7%	na
Sweden	0.5%	0.6%	1.0%	0.9%	0.9%	0.7%	0.7%	0.7%	0.8%	1.3%	1.3%	1.0%
Switzerland	0.8%	0.9%	1.0%	1.0%	0.9%	0.9%	1.0%	1.2%	1.5%	1.7%	1.7%	1.4%
UK	2.6%	2.8%	3.8%	3.8%	3.8%	4.0%	4.2%	4.3%	4.5%	4.8%	4.1%	3.6%
<b>Weighted average</b>	<b>1.1%</b>	<b>1.2%</b>	<b>1.5%</b>	<b>1.5%</b>	<b>1.4%</b>	<b>1.5%</b>	<b>1.6%</b>	<b>1.7%</b>	<b>1.8%</b>	<b>2.0%</b>	<b>1.7%</b>	<b>1.5%</b>

ns = non significant ; nlr = not legally recognised ; na = not available

# The European average agency work penetration rate was 1.5% in 2009

The European average agency work penetration rate fell from 1.7% in 2008 to 1.5% in 2009, notably due to the sustained impact of the economic crisis. Nevertheless, this average hides enormous differences from country to country, ranging from 3.6% in the UK to 0.1% in Greece. Mature markets in Western Europe, namely the UK, France, Germany and the Benelux countries, are all above average; whereas the newer markets in Southern and Eastern Europe are all below average, indicating that they still have room to grow.



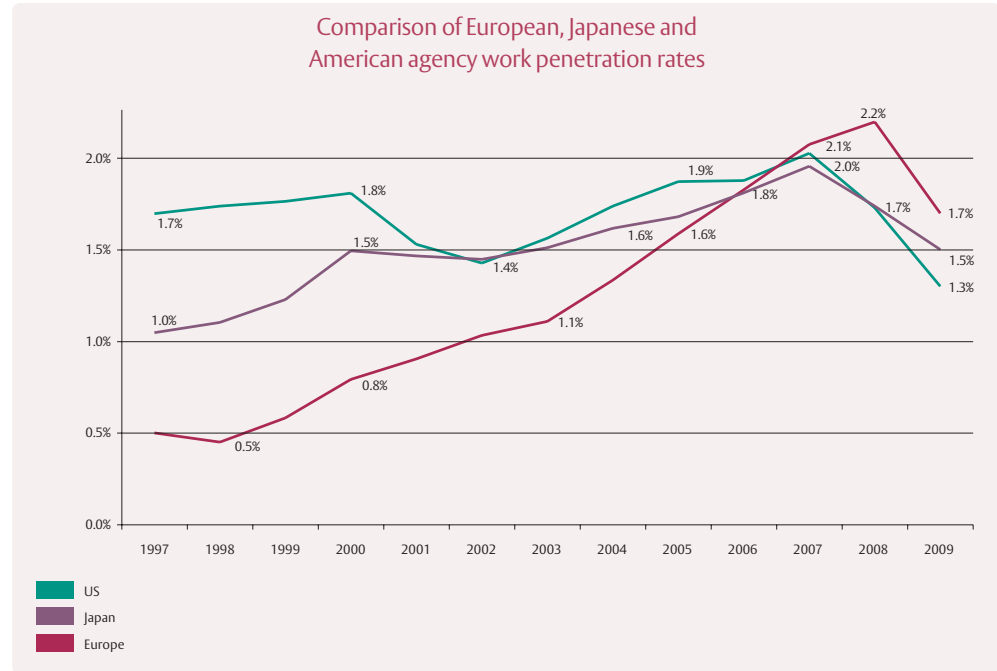
\* Defined as the number of full-time equivalents - as supplied by Ciett National Federations - divided by the total active working population - as published by the ILO



# Penetration rate in major markets fell in 2009

AGENCY WORKERS  
IN NUMBERS

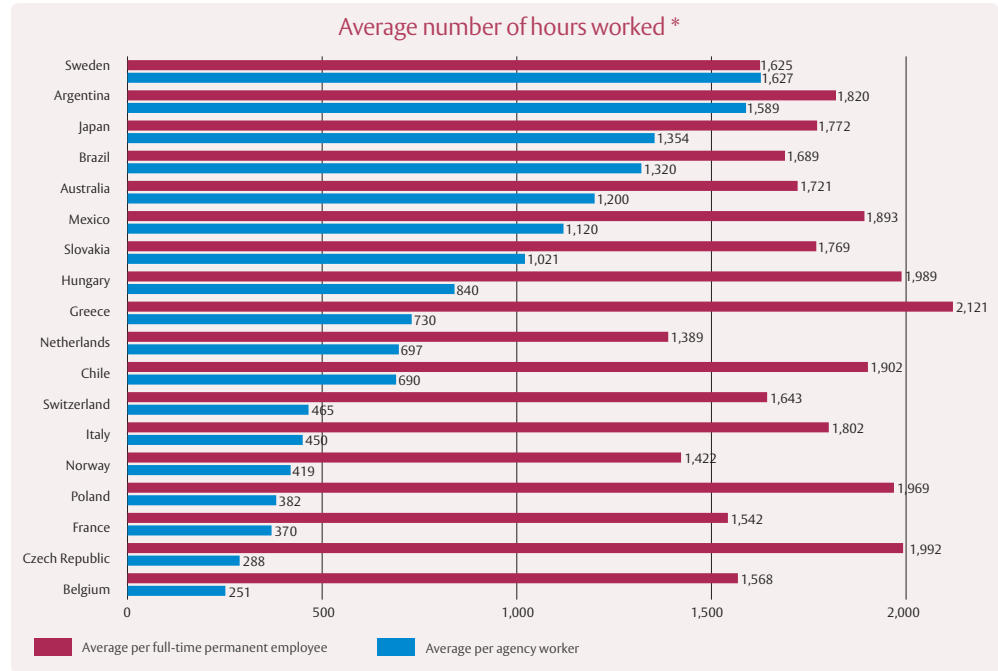
In 2009, the European and American penetration rates fell to 1.4% and 1.3% respectively, reflecting the sustained impact of the economic crisis on these markets, whilst the Japanese penetration also fell 1.7%, although it entered the crisis later than the USA and Europe.



Source: Ciett national federations

# Agency workers work nearly half as many hours on a yearly basis as full-time permanent employees

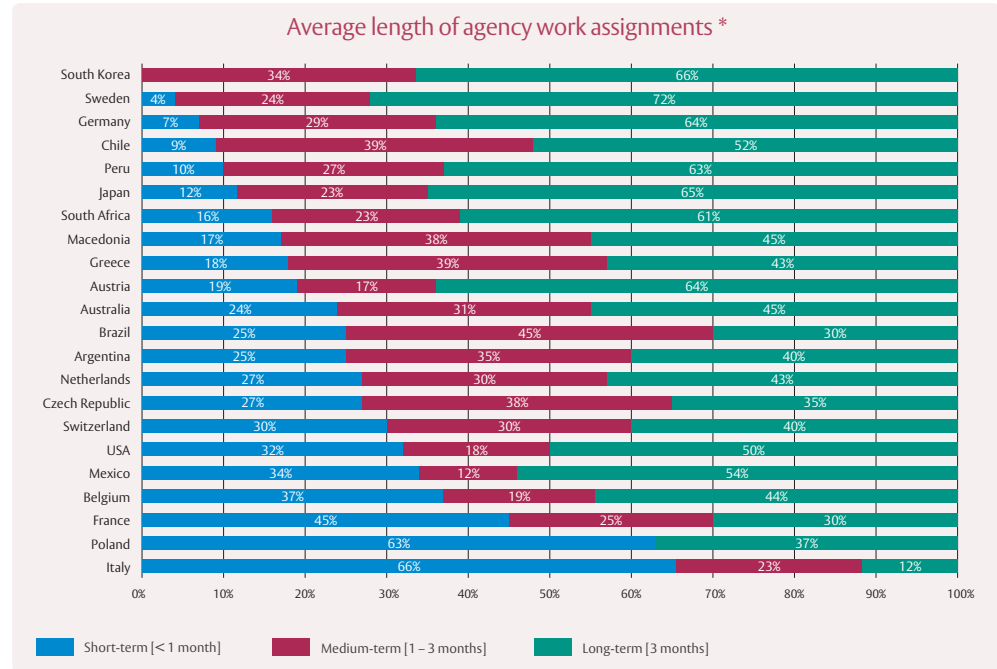
Agency workers tend to work less during one year than a worker with a full-time, open-ended contract - except for the notable exception of Sweden. From country to country, the average number of hours worked by an agency worker compared to the average number of hours worked by a permanent full-time employee varies greatly, from less than 15% in the Czech Republic to equivalent in Sweden.



\* By an individual during one year  
 Sources : Ciett National Federations, ILO 2009

# Most agency work assignments are more than one month long

In most countries, the average length of assignment of an agency worker exceeds one month, and often even exceeds three, the notable exceptions being Italy [66%] and Poland [63%], where more than half of the assignments are less than one month long. All assignments in South Korea are over one month long, and only 4% of assignments in Sweden last for less than a month.



\* The length of an assignment refers to the duration spent executing a specific job in one single company. A contract can be renewed several times, depending on the legal obligations of the country in question, to fulfil one single assignment. If the worker changes function in the same company, or executes the same job in another company, then the assignment is said to have changed.

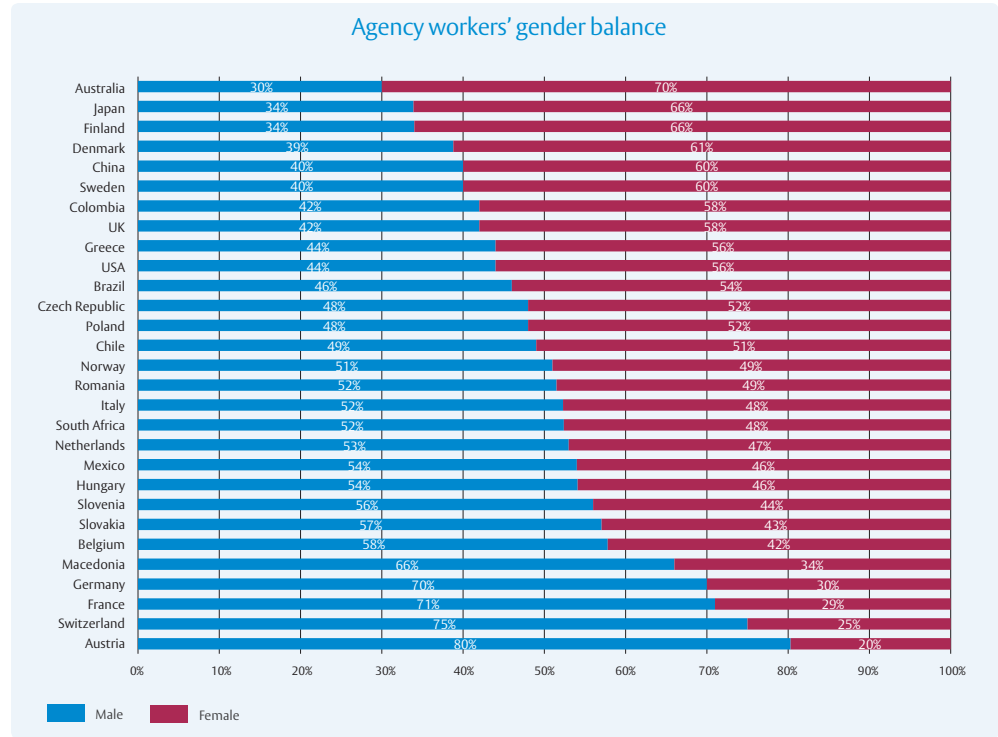
### 3. The profile of agency workers

- Differences in gender balance depend on the socio-economic fabric of a country.
- Three in five agency workers are aged less than 30.
- Nearly three in four agency workers have at best finished their secondary education.
- Agency work is mostly used in the manufacturing and services sectors.
- The motive to work via an agency is usually to gain work experience.
- A significant proportion of agency workers do not seek a permanent employment.
- Most agency workers are satisfied with their job.

## a. General trends

# Differences in gender balance depend on the socio-economic fabric of a country

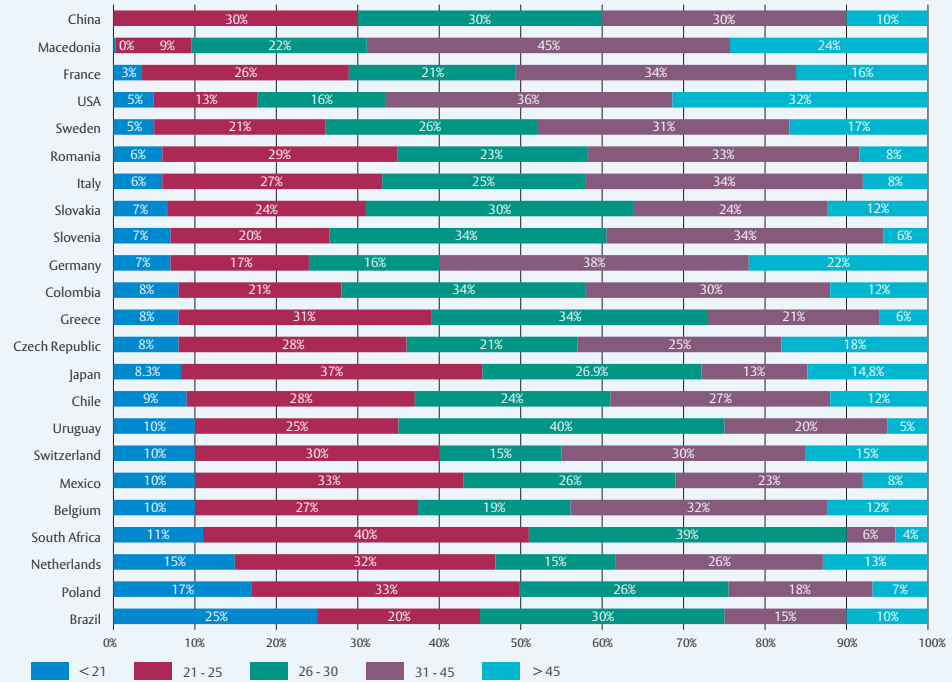
From country to country, differences in gender balance in agency work are determined by the particular socio-economic fabric and economic history of each country, as well as the sectors allowed to use agency work. More services-oriented markets tend to employ more women, such as Sweden [60% of women and 57% in the services sector], whereas markets with a strong industrial fibre usually employ more men, such as Germany [70% of men and 48% in the manufacturing sector].



# Most agency workers are aged below 30

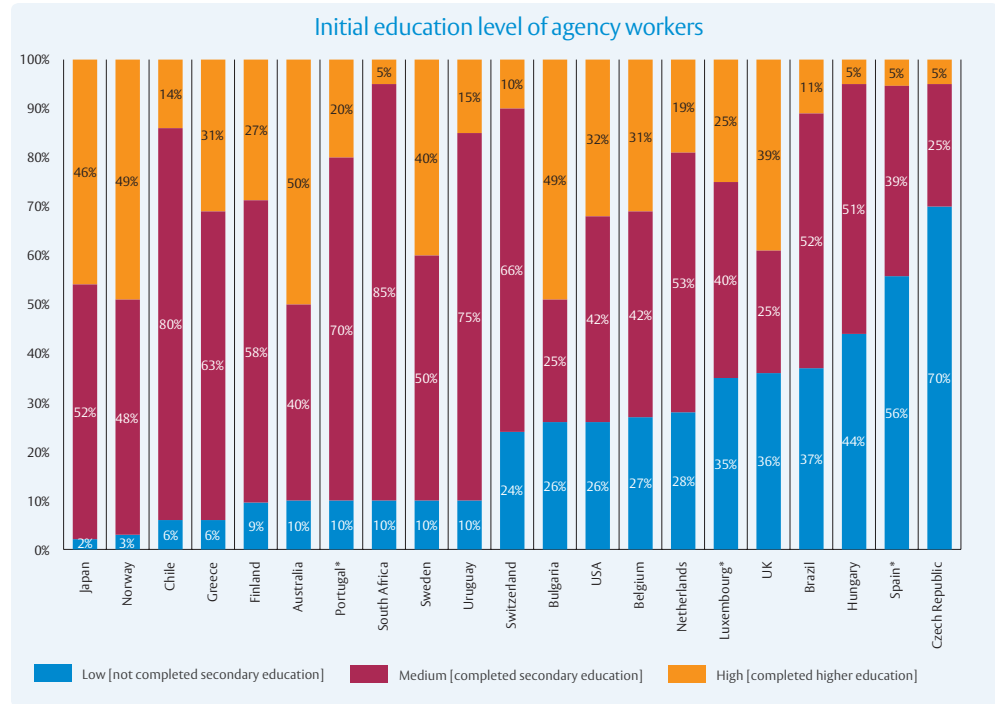
Over-represented in the agency work sector, when compared to the total active working population, most agency workers are aged below 30. Agency work often serves as a first professional experience for first-time entrants into the labour market, providing them with a valuable initial experience or serving as a stepping-stone to permanent employment. The three notable exceptions to this trend are the USA [68% over 30], Germany [60% over 30], and Macedonia [69% over 30]. This can be explained by the fact that in some of these countries agency work is culturally accepted as a viable alternative to permanent employment.

Age distribution of agency workers



# Most agency workers have only school-leaving qualification

In most countries, the majority of agency workers have a low to medium initial education level. On average, 51% of agency workers worldwide have finished secondary school, and 23% have not. Spain [56%] and the Czech Republic [70%] are the only countries where a majority of agency workers have not completed their secondary education. Agency work can play an important role in helping these low-skilled workers enter the labour market and gain valuable experience.



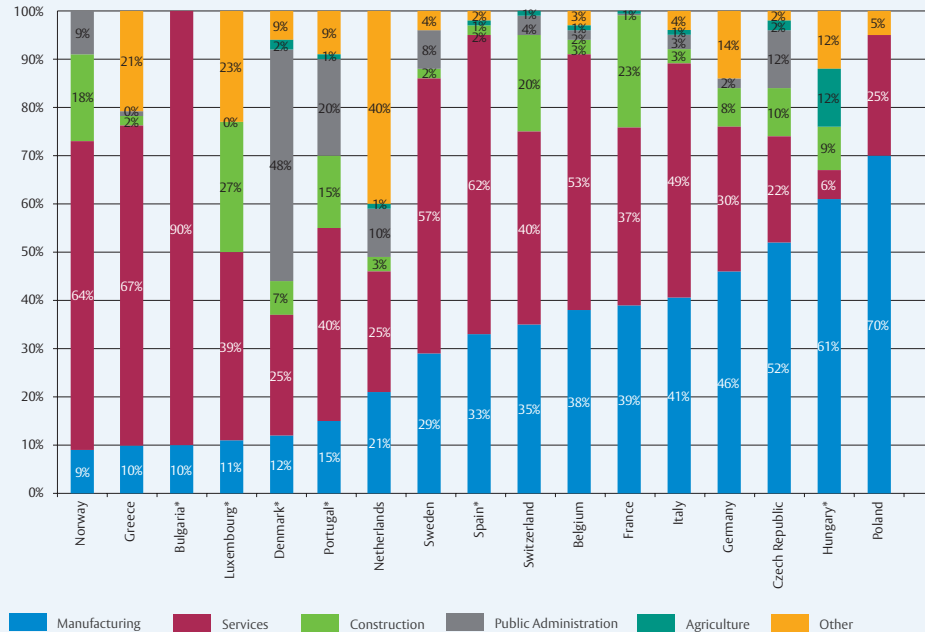
\* figures for 2008



# Sectoral distribution of agency work in Europe

Reflecting the ongoing mutations of the European economies, the sectoral distribution of agency work in Europe has seen a recent trend away from usage in the industrial sector [30% average], towards a growing use in the services sector [45% average]. Manufacturing remains an important user of agency work in traditionally industrial economies, such as Poland [70%] and Hungary [61%]. Czech Republic [12%] and the Netherlands [10%] make important use of agency work in public administration, as do Luxembourg [27%] and France [23%] in the construction sector. Hungary is the only country to make significant use of agency work in the agricultural sector [12%].

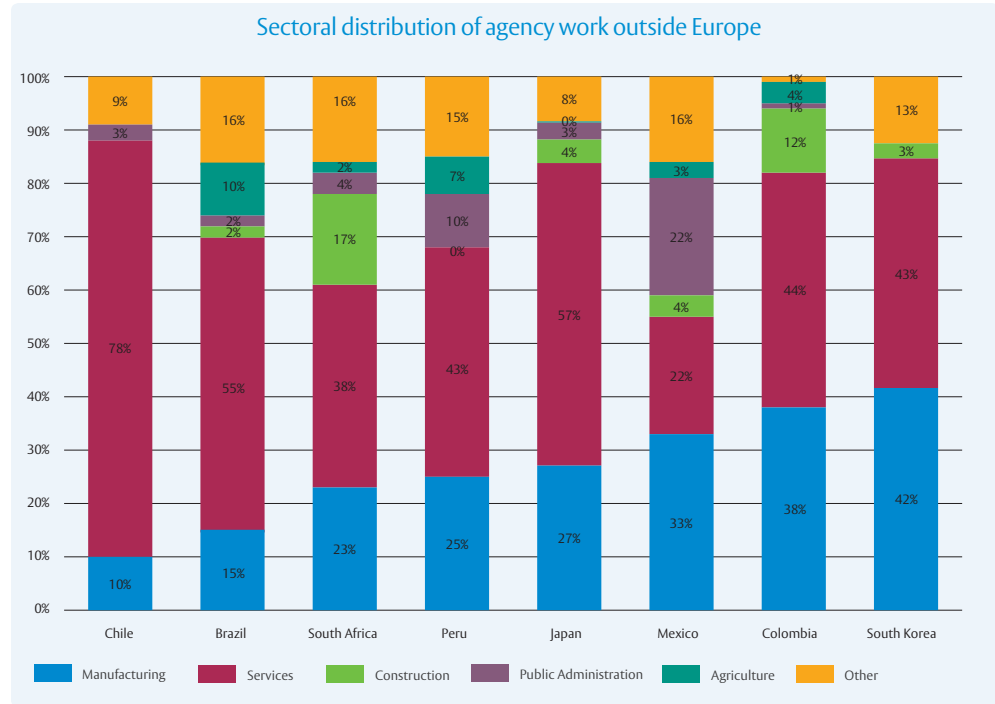
Sectoral distribution of agency work use in Europe



\* figures for 2008

# Sectoral distribution outside Europe

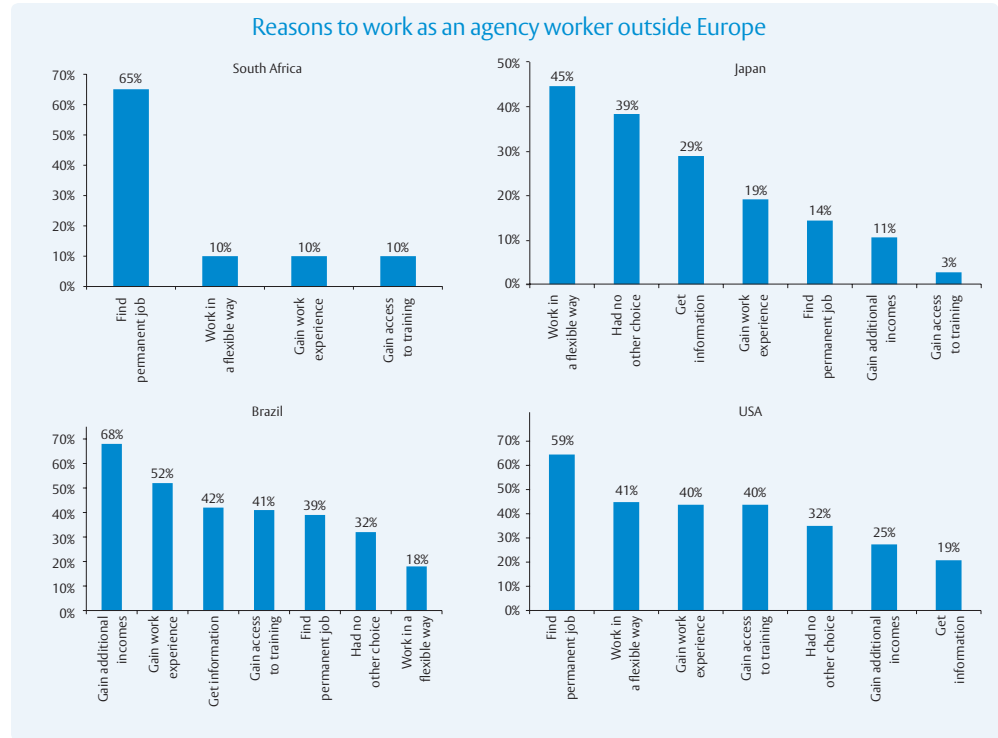
Peru [10%] makes important use of agency work in the public sector. Construction is an important user of agency work in South Africa [17%]. More than three in four Chilean agency workers work in the services sector, and 42% of South Korean agency workers work in the manufacturing sector.



## b. Agency workers' motives and satisfaction

# Outside Europe the motive to work via an agency is usually to find a permanent job or work flexibly

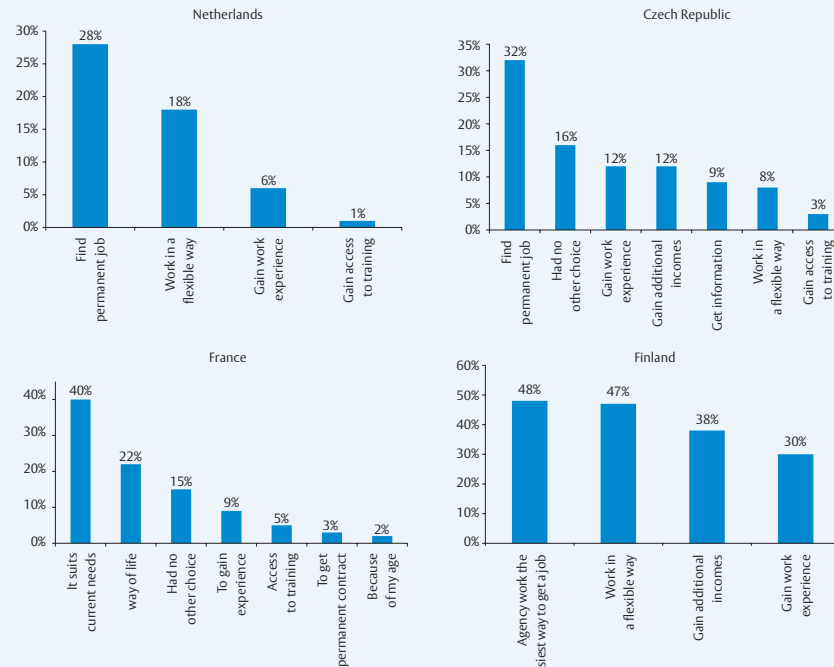
The main motives to work as an agency worker are generally work and career-related. It is often to find a permanent position [59% in the USA], but can also be to gain additional income [68% in Brazil]. Gaining access to training is an important reason to work as an agency worker in Brazil [41%] and the USA [40%], but not so in South Africa [10%] or Japan [3%]. For those seeking to balance personal and professional life, the inherent flexibility that agency work offers is cited as an important motive in Japan [45%] and the USA [41%], two countries with a firmly established agency work industry.



# In Europe the main motive to work via an agency is also to find a permanent job or gain work experience

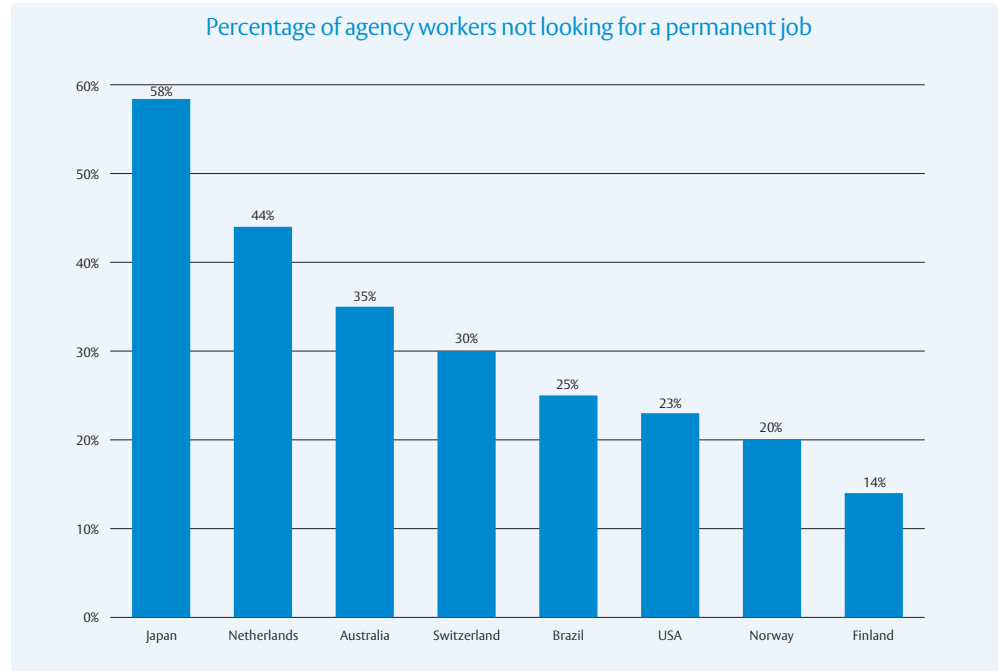
In most European countries the main motive is - as outside Europe - to find a permanent position [28% in the Netherlands] or to gain work experience [30% in Finland]. Other non-work or career-related motives exist to engage in agency work, often to obtain additional incomes [38% in Finland], but also to achieve a better work-life balance by working in a flexible way [28% in the Netherlands].

Reasons to work as an agency worker in Europe



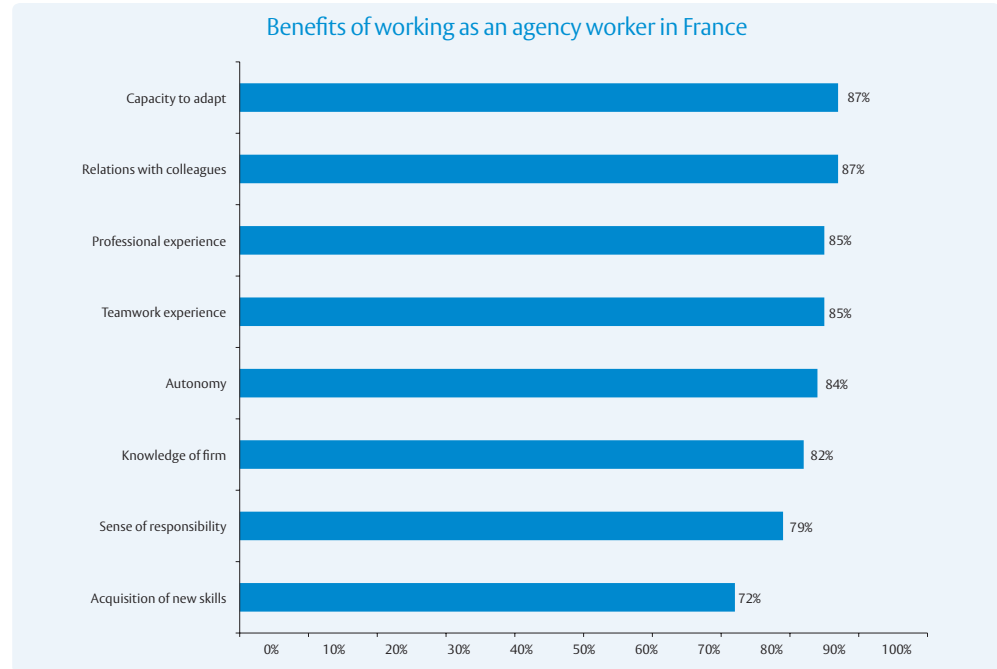
## However a significant proportion of agency workers do not seek a permanent employment

In several countries, a considerable number of agency workers do not seek a permanent position, notably in Japan with 58%, the Netherlands with 44% and Australia with 35%. Whether it is to find the right balance between private and professional life, or to obtain additional income or access to training, agency work is seen as a practical answer to match different aspirations to flexibility.



# In France agency work is seen as enhancing employability

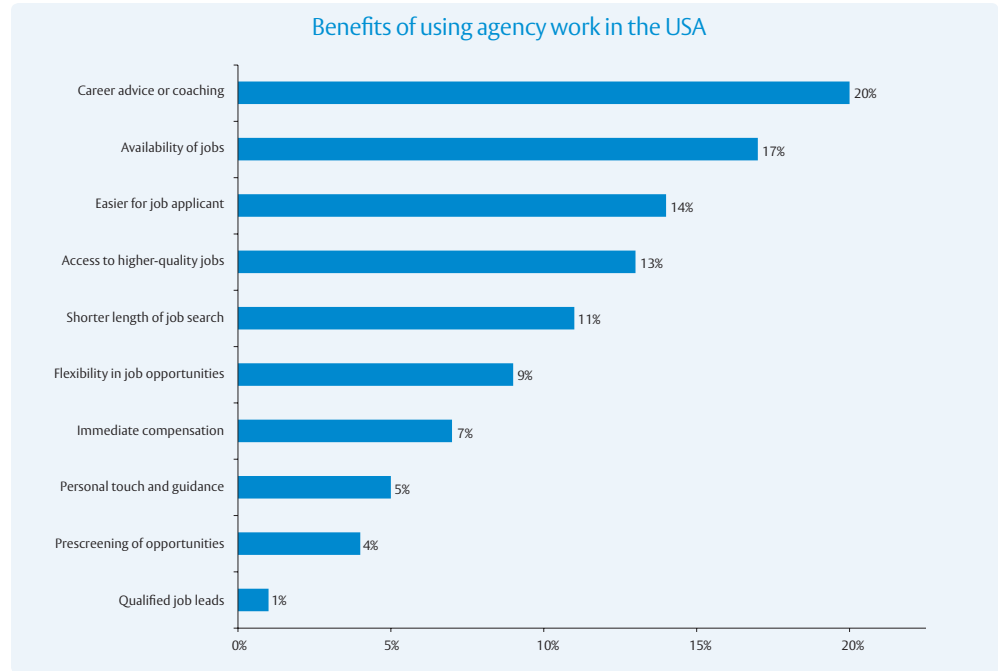
In France, the most cited benefits of working as an agency worker are the “capacity to adapt” [87%] and the relations held with colleagues [87%]. Most French agency workers are convinced that agency work allows them to acquire new skills [72%] and the professional experience [85%] they need to improve their employability, thereby ultimately providing them with more work opportunities.



Source: OME study: Regards croisés sur l'intérim 2010

# In the USA agency work is recognised as an effective means of searching for a job

In the USA, the most cited benefit of working as an agency worker is “career advice or coaching” [20%]. This illustrates the key role that agencies play in the triangular work relationship, acting as a mentor for the agency worker. The next most mentioned positive attributes are the “availability of jobs” [17%] and the fact that it is “easier for [the] job applicant” [14%].



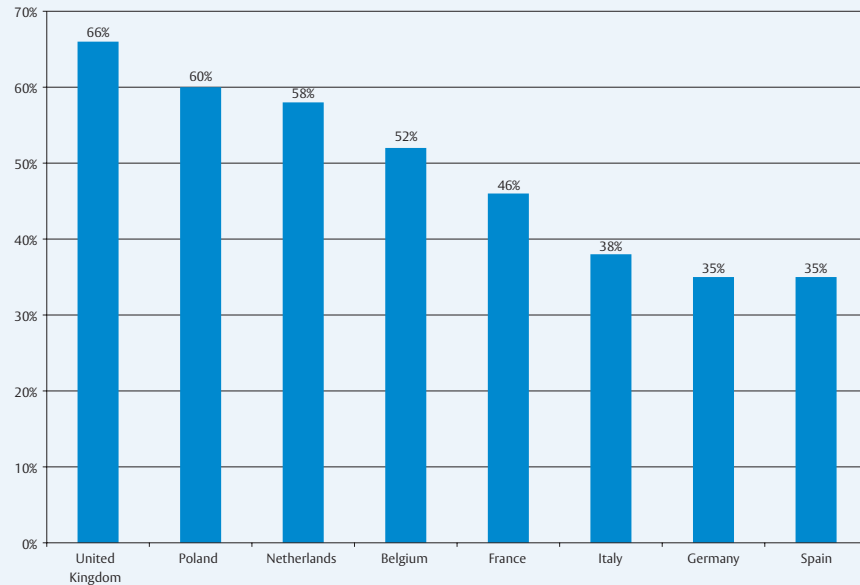
Source: American Staffing Association 2008



# Agency work is seen as offering the right balance between work and private life

In a poll of the general public taken in seven European countries, the UK is seen to believe most firmly that agency work offers a better balance between work and private life [66%], followed by Poland [60%], and the Netherlands [58%]

Agrees with the statement: "Agency work provides a better work life balance" \*

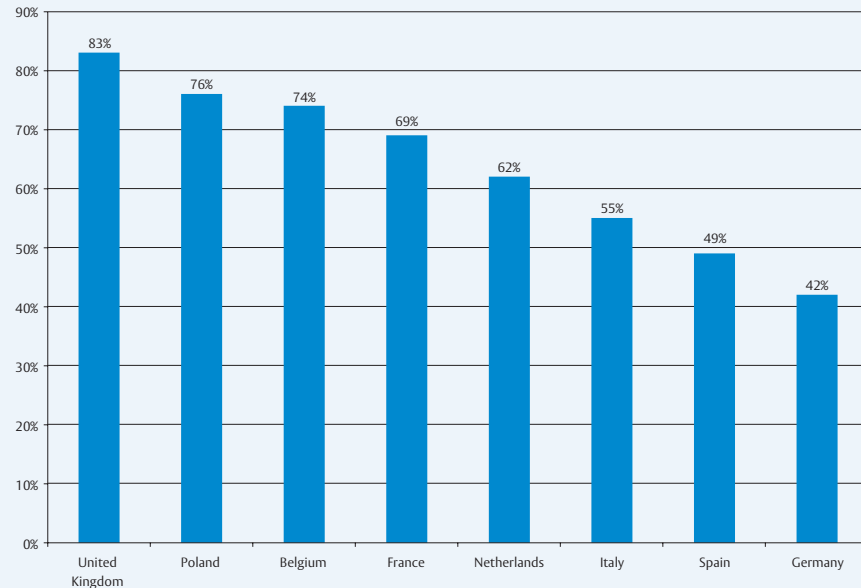


\*5373 people were polled in Belgium, France, Germany, Italy, Netherlands, Poland, Spain and the UK. Data was weighted demographically according to age, sex and occupational status. Source: OME study: Regards croisés sur l'intérim 2010

# Agency work is accepted as a desirable form of work

83% of the UK general public would recommend agency work to family or friends according to a recent survey. This positive trend is displayed throughout the surveyed countries with Poland [76%], Belgium [74%], and France [69%] all willing to recommend agency work to people they know.

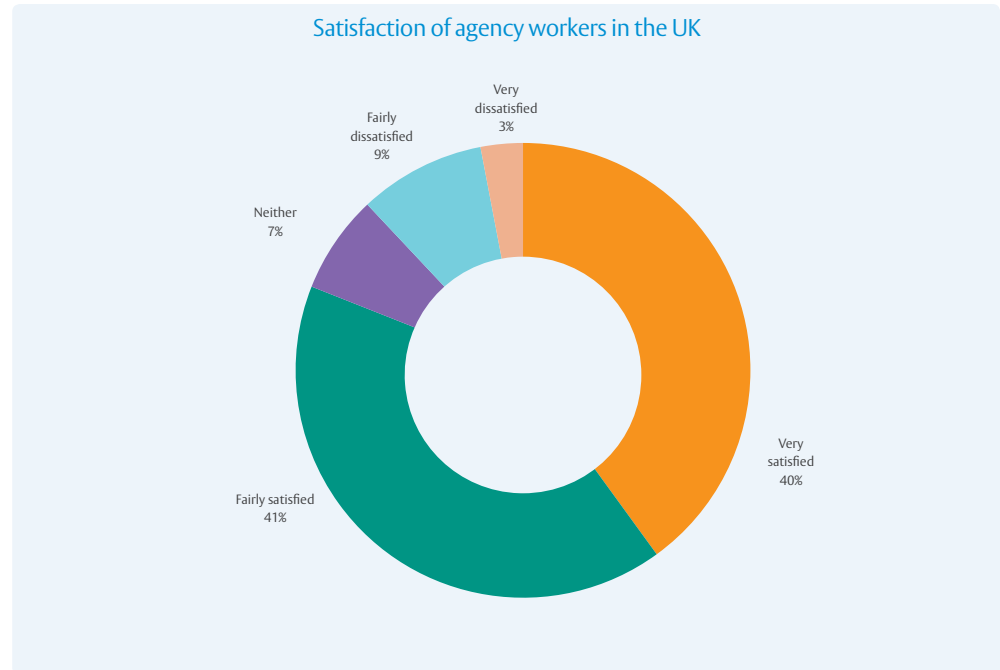
Agrees with the statement: "Would you recommend agency work to family or friends?" \*



\*5373 people were polled in Belgium, France, Germany, Italy, Netherlands, Poland, Spain and the UK. Data was weighted demographically according to age, sex and occupational status. Source: OME study: Regards croisés sur l'intérim 2010

# Most agency workers in the UK are satisfied with their job

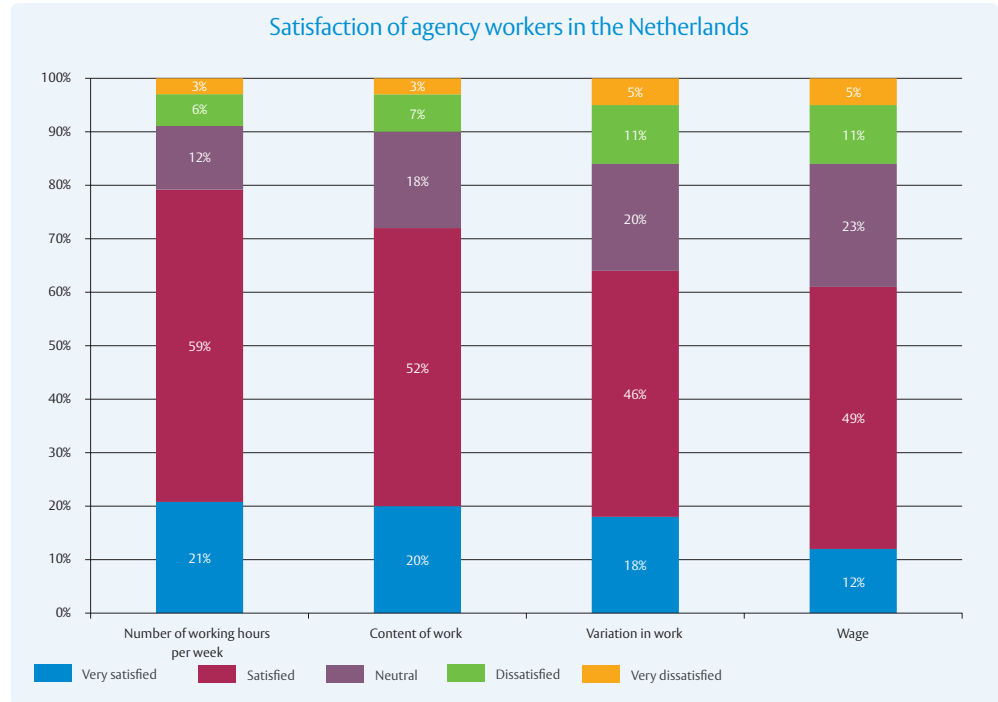
More than four in five agency workers in the UK reported that they were “very” or “fairly” satisfied with working via an agency, and less than one in eight said they were “fairly” or “very” dissatisfied with it. This counters the popular misconception that agency workers are generally dissatisfied with the work they find through an agency, and explains the important proportion of agency workers who wish to continue to work in a flexible way.



Source: REC & BERR Study 2008

# In the Netherlands most agency workers are satisfied with the quality of their work

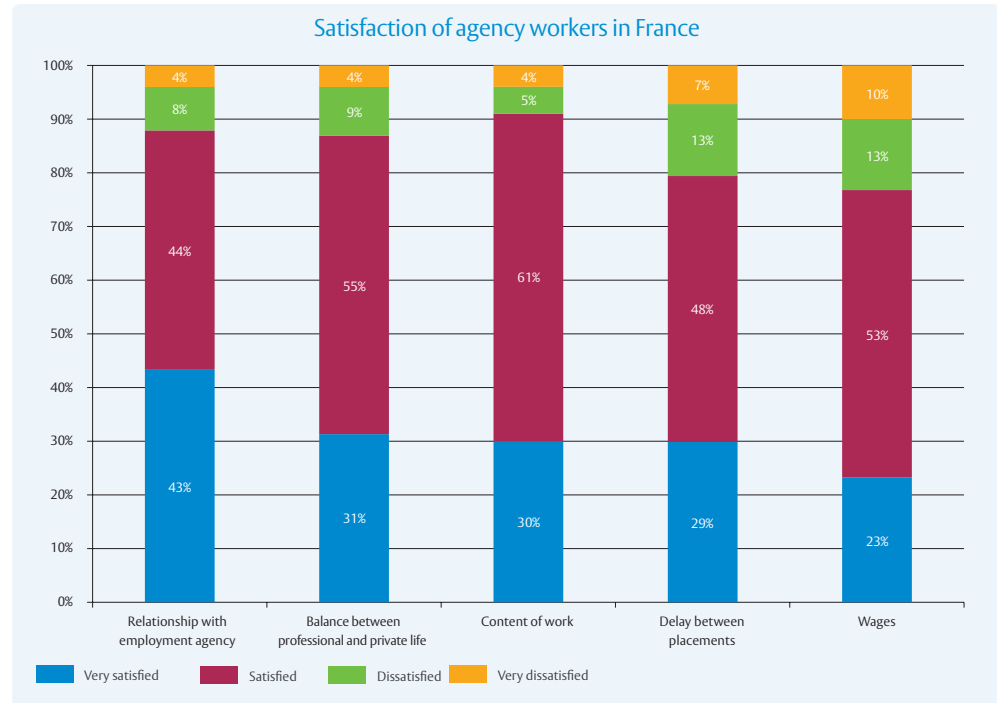
72% of agency workers in the Netherlands reported that they were “satisfied” or “very satisfied” with the content of their work, and 64% with the variation. The wages were judged “satisfying” or “very satisfying” by 61%, as were the number of working days by 80%. This partially explains why 44% of agency workers in the Netherlands do not seek a permanent position, and prefer to work as temporary agency workers.



Source: ABU/ECORYS 2009

# In France agency workers have a good relationship with their employment agency

87% of agency workers in France reported that they were “satisfied” or “very satisfied” with the relationship they had with their employment agency. 91% were happy with the content of their work. The wages were judged “satisfying” or “very satisfying” by 75%, as the balance between professional and private life [81%].



Source: OME study :Regards croisés sur l'intérim 2010

## 4. Agency work's contribution to a better functioning labour market

- Agency work facilitates transitions in the labour market.
- Agency work contributes to reducing unemployment especially by serving as a stepping-stone into the labour market.
- More people are employed after working as an agency worker than before.
- The higher the agency work penetration rate, the lower the level of undeclared work.
- Vulnerable target groups use agency work as a means of entering the labour market.

## a. Transitions

# Agency work facilitates transitions in the labour market

Agency work broadens the range of work solutions available to workers to meet their lifestyle choices or personal constraints at every step of their professional lives. Inherently flexible, agency work can serve as a stop-gap economic measure, a means of enhancing employability, or improving work-life balance.

*“Factors helping to drive the growth in TAW include its active use to facilitate the re-engagement of long-term unemployed into work, and a growth in the labour force participation of people that need or prefer temporary work.”\**

\*Source: Eurofound - Temporary Agency Work and Collective Bargaining in the EU | 2009

## Transitions in the labour market



- **Finance** education whilst studying

- Provide temporary assignments leading to a **permanent** contract
- Gain a first professional **experience**

- Provide new **opportunities** to evolve and **improve** life conditions
- Provide a flexible working solution to meet familial **responsibilities**

- Facilitate **transitions** from one job to another through outplacement services

- Provide **extra** financial revenues
- Improve **work-life balance**



# Agency work contributes to reducing unemployment

AGENCY WORK'S CONTRIBUTION TO A BETTER FUNCTIONING LABOUR MARKET

By serving as labour market intermediaries, and improving the matching of workers with jobs, PrEAs contribute to reducing unemployment - both frictional and long-term - and help people enter, and re-enter, the labour market.

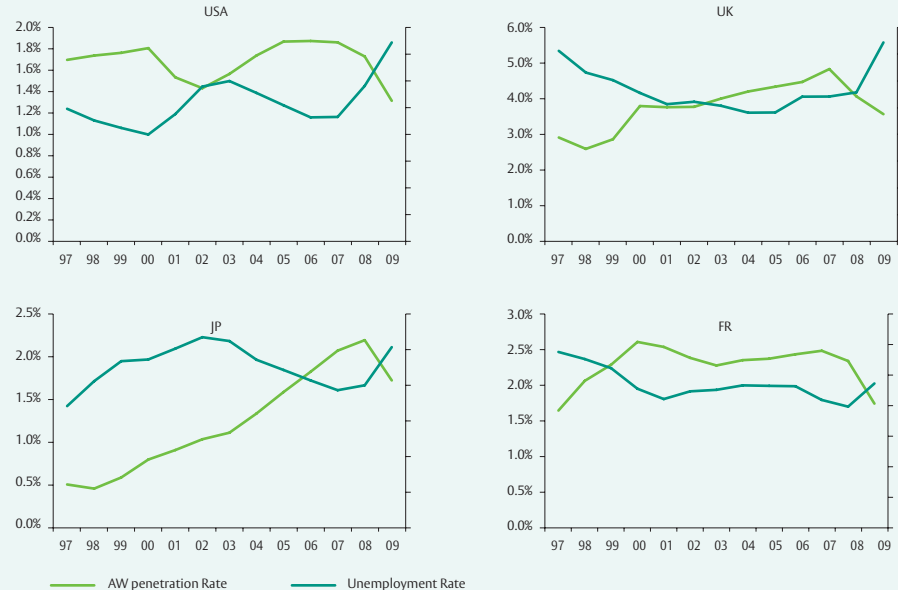
## Frictional unemployment

By rapidly placing agency workers on assignments, PrEAs reduce the frictional rate of unemployment - i.e. the period of inactivity between jobs - allowing people to remain active, thereby enhancing their skills and experience, and helping them to quickly find a new job.

## Long-term unemployment

Working via an agency allows the long-term unemployed to regain self-confidence, acquire new skills, and demonstrate their capacities to potential employers.

Agency work penetration rate and unemployment rates



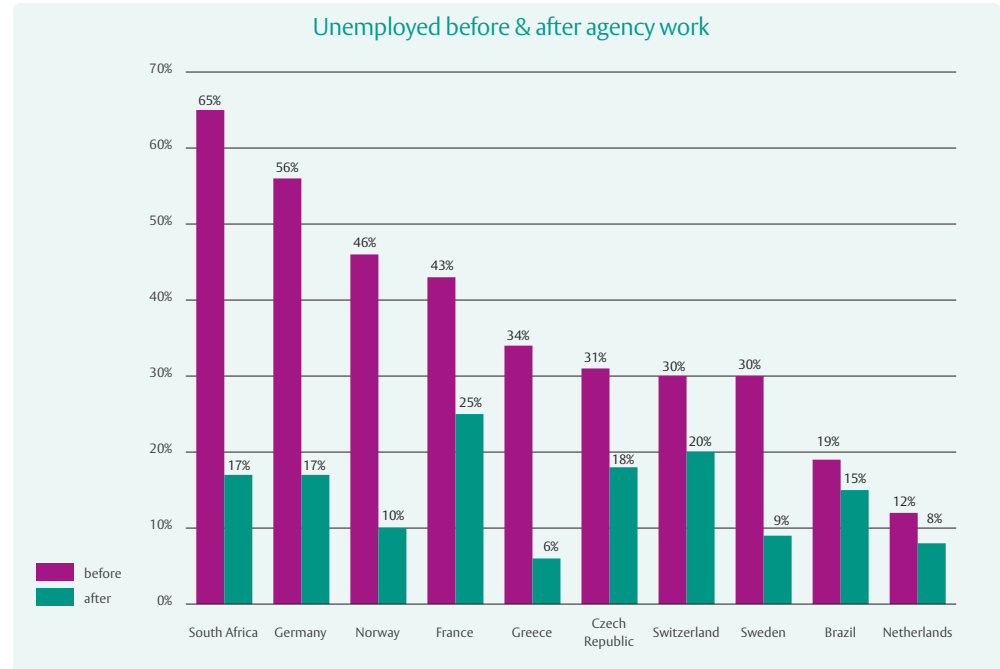
Source : Ciett National Federations, IMF 2010

## b. Job creation

# Less people are unemployed after working as an agency worker than before

AGENCY WORK'S CONTRIBUTION  
TO A BETTER FUNCTIONING LABOUR MARKET

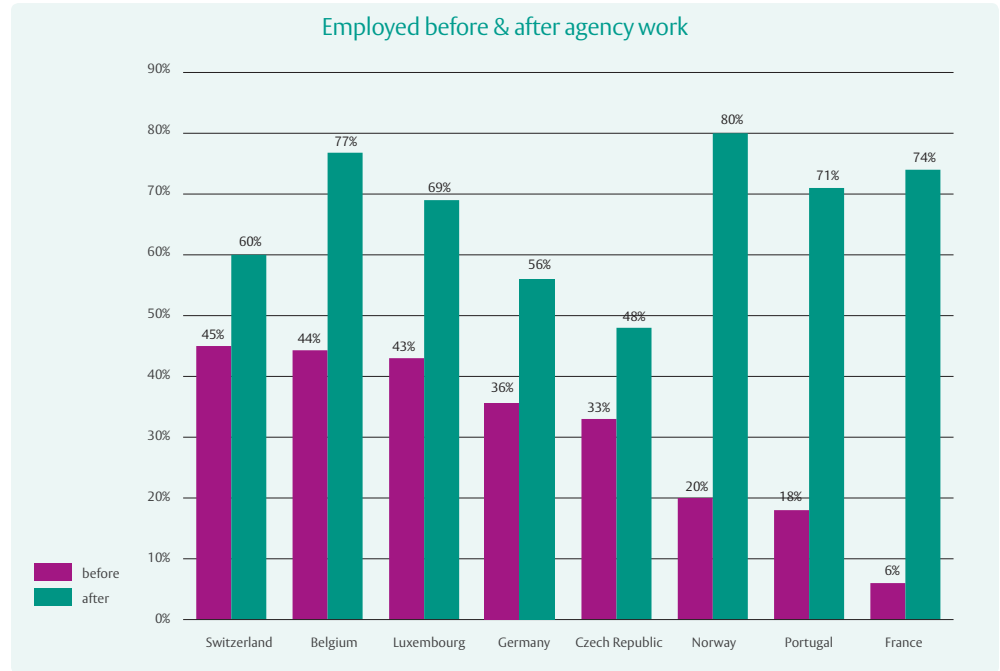
Many agency workers are officially registered as “unemployed” before working with an agency [37% average]. This proportion falls to less than half that level after working as an agency worker [15% average]. Economists Lawrence Katz of Harvard University and Alan Krueger of Princeton University assert that the agency work industry was responsible for up to 40% of the drastic reduction in unemployment witnessed in the USA in the 1990s. This illustrates the double effect of agency work's stepping-stone function: first, from unemployment to work, and second, from a temporary contract to a permanent one.



\*% of agency workers that are officially registered as unemployed before and 12 months after temping

## More people are employed after working as an agency worker than before

On average, the proportion of those in employment before [29%] and after [59%] having worked as an agency worker is more than doubled. This supports the argument that agency work serves as a stepping-stone, especially for first-time entrants to the labour market, enhancing worker employability, by proposing job assignments and vocational training.



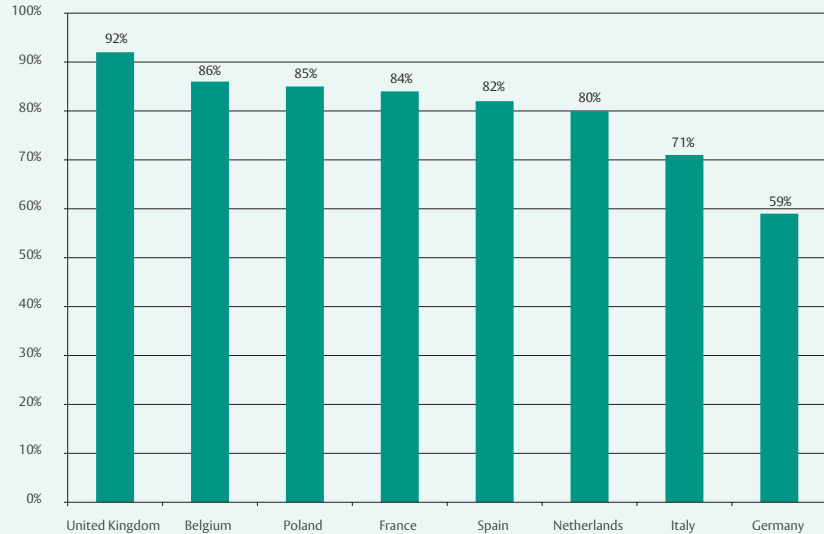
\*% of agency workers that are employed (either with a temp, fixed-term or open-ended contracts) before and 12 months after temping

# Agency work is an effective way to land a first job

AGENCY WORK'S CONTRIBUTION  
TO A BETTER FUNCTIONING LABOUR MARKET

According to a poll carried out among 5373 European citizens, the overwhelming majority of people believe that agency work is a good way to enter the job market for the first time. The United Kingdom and Belgium hold this view most strongly with 93% and 86% respectively agreeing that temporary agency work is an effective means of getting a first job. Even in Germany, the most sceptical country, 59% believe temporary agency work to be effective.

Agrees with the statement: "Agency work is an effective way to land a first job" \*



\*5373 people were polled in Belgium, France, Germany, Italy, Netherlands, Poland, Spain and the UK. Data was weighted demographically according to age, sex and occupational status.  
Source: OME study: Regards croisés sur l'intérim 2010

# Agency work is an effective way of finding permanent work.

Temporary agency work helps people find permanent work. A study carried shows that across Europe there is acceptance of the fact that temporary employment agencies are the best way of securing permanent work. In the United Kingdom 90% agreed, in the Netherlands [78%] and Poland [77%]

Agrees with the statement: "Agency work is an effective way of finding a permanent contract" \*



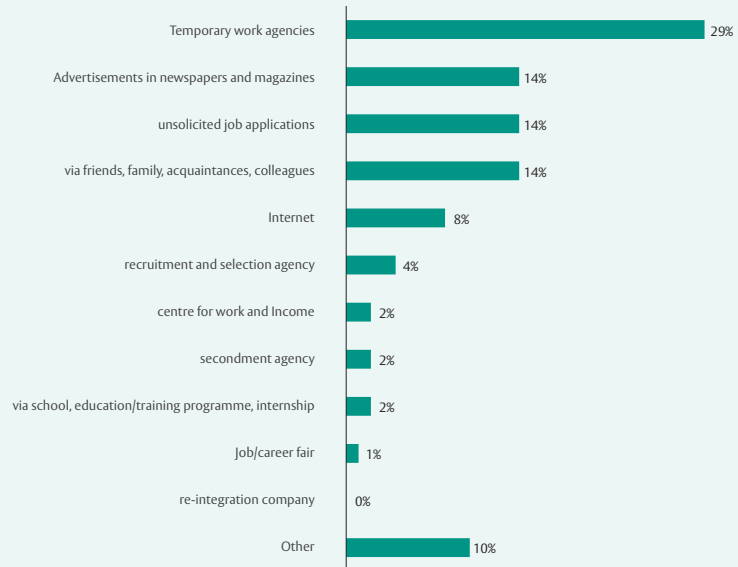
\*5373 people were polled in Belgium, France, Germany, Italy, Netherlands, Poland, Spain and the UK. Data was weighted demographically according to age, sex and occupational status. Source: OME study:Regards croisés sur l'intérim 2010

# Temporary work agencies are the best channel to find permanent work

AGENCY WORK'S CONTRIBUTION  
TO A BETTER FUNCTIONING LABOUR MARKET

A Study from the Netherlands shows that temporary agency work is the most effective means of making the transition from temporary work into a permanent contract. 29% of those surveyed used temporary employment agencies for this purpose compared with adverts in newspapers and magazines [14%] and unsolicited applications [14%]

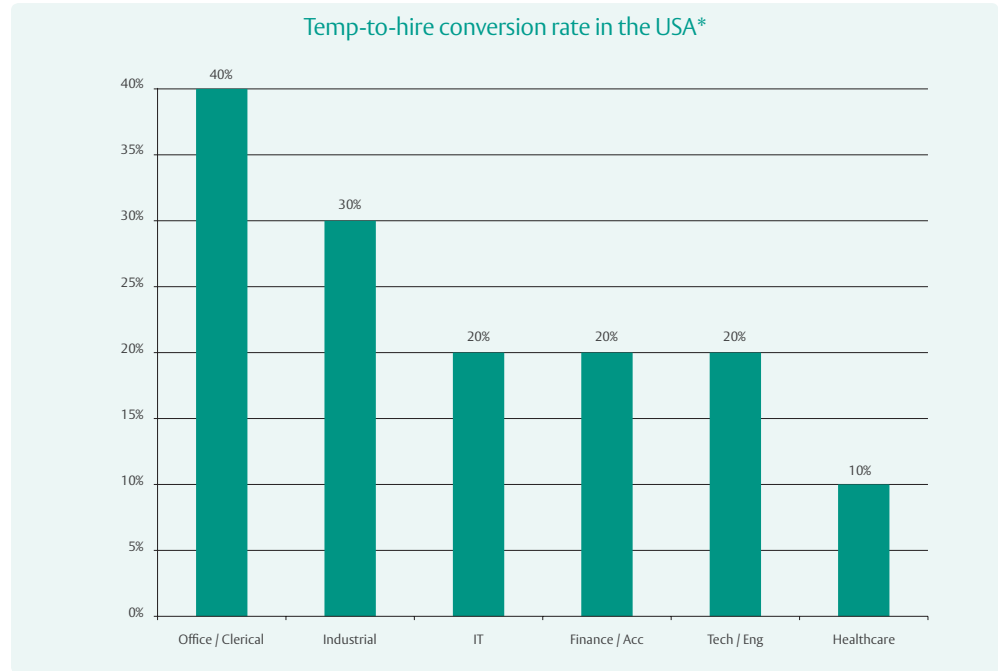
How do temporary employees find permanent work in the Netherlands?



Source: ABU/ECORYS 2009

# Temp-to-hire conversion rates in the USA vary according to the segment

The median temp-to-hire conversion rate in the USA is 20%. This confirms agency work's acknowledged stepping-stone function, whereby it facilitates transitions from a temporary contract to a permanent one. However, conversion rates can vary widely according to the segment. Commercial agency work has a much higher temp-to-hire conversion rate than professional agency work. The companies that report the highest median rate of conversion - 40% - derive most of their revenue from the office/clerical segment. At the other end of the spectrum, companies that derive a majority of their revenue from the health sector report a median temp-to-hire conversion rate of 10%.



\*% of agency workers in the USA that get an open-ended contract after temping  
Source: Staffing Industry Analysts 2008 - [www.staffingindustry.com](http://www.staffingindustry.com)



# The higher the agency work penetration rate, the lower the level of undeclared work

AGENCY WORK'S CONTRIBUTION  
TO A BETTER FUNCTIONING LABOUR MARKET

There appears to be an inverse correlation between penetration rate of agency work and level of undeclared work. By serving as a legal alternative in sectors often plagued by illegal labour, agency work can bring to the labour market thousands previously illegally employed, and hence serve as a means of fighting undeclared work. Working via an agency allows workers to take full advantage of all the legal protection and enforcement mechanisms available, unlike the often insecure and potentially risky work available through illegal channels.

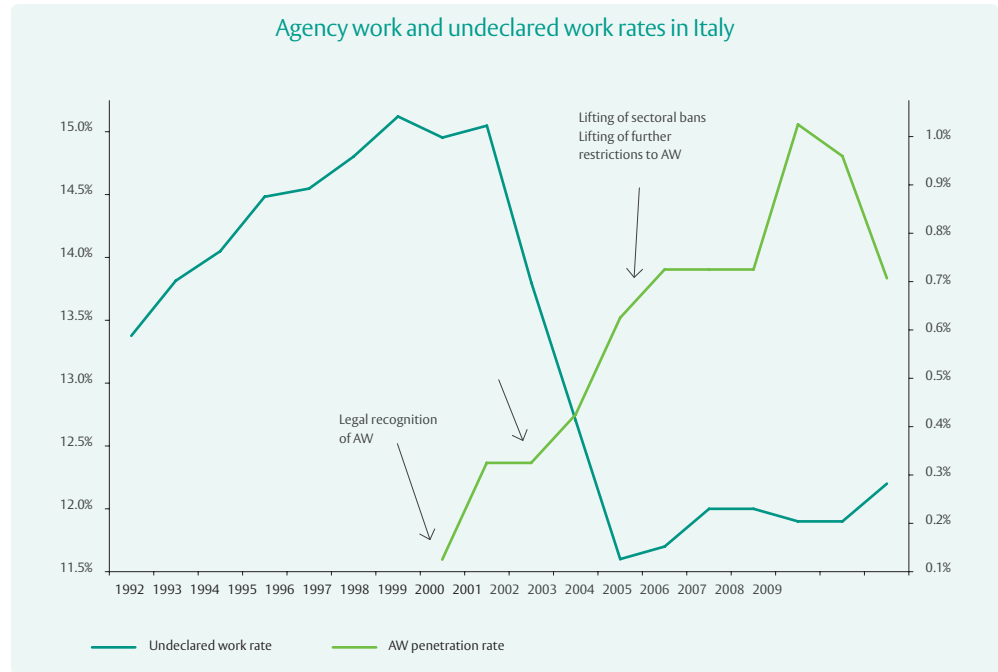
Agency work penetration rates and undeclared work as a percentage of GDP



Sources: EuroStat, Ciett National Federations, Bain analysis

# In Italy the lifting of restrictions on agency work helped curb undeclared work

It was only in 1997, with the “Treu package”, that agency work was legally recognised in Italy. Since then, additional regulatory changes were introduced to further liberalise the Italian agency work industry: in 2000, with the opening up of the agricultural, construction and public sectors, and in 2003, with the “Biagi law”. In 2005, a study conducted by the Italian National Institute of Statistics demonstrated that agency work played a key role in the reduction of undeclared work.



Source: Confinterim.it, EuroStat, Istituto Nazionale di Statistica, LitSearch

# Agency work facilitates quality transitions through skills upgrading

AGENCY WORK'S CONTRIBUTION  
TO A BETTER FUNCTIONING LABOUR MARKET

In many EU countries, the agency work industry has developed specific training schemes to facilitate access to vocational training for agency workers. In seven EU countries - Austria, Belgium, France, Italy, Luxembourg, Spain, and the Netherlands - sectoral bi-partite training funds have been set up. Countries with more long-term training programmes tend to train less temporary agency workers than countries with short-term training programmes. This reflects the fact that the agency work industry establishes training schemes to suit the specific needs of the labour market. It is also generally the agency that takes the initiative to train a worker.

Training programmes provided to agency workers

	FR	BE	NL	ES	IT
Number of trained agency workers [x 1.000]	270,0	19,6	138,7	10,9	204,2
% of trained agency workers	12,3%	3,6%	19,0%	1,4%	35,6%
Number of training hours [x 1.000]	10.110	303		760	1.221
Number of training hours per trained agency worker	47,4	15,4		69,8	6,0
Amount invested in training by temporary work agencies [x 1.000.000]	331	4,7	35	4,8	149
Amount invested per trained agency worker (€)	1.225,9	239,7	252,3	440,4	729,6
Amount invested in training in % of wages	2,15% <sup>1</sup>	0,50% <sup>2</sup>	1,02%	1,25%	

1 - Maximum contribution rate 2 - Minimum contribution rate as determined by collective labour agreement  
Source : IDEA Consult 2008

## c. Inclusion & diversity

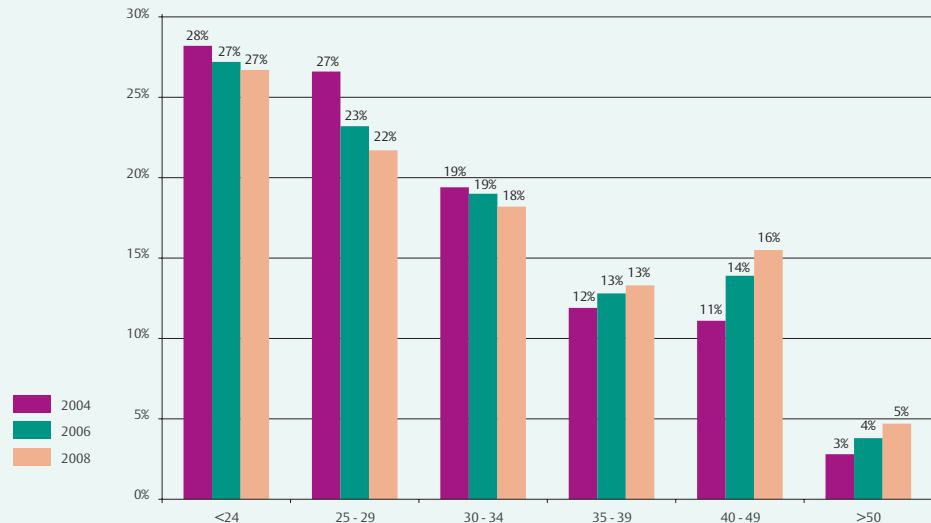
# The number of agency workers over 50 is increasing in Italy

Workers over 50 are under-represented in the Italian agency work population. However, their numbers are continually on the rise. In 2004, 2006 and 2008, the proportion of agency workers aged over 50 has steadily increased from 3% to 4% to 5%.

*“Agency work offers groups such as migrant workers, women returning from childcare breaks, disabled and unemployed people across to the labour market. In principle, agency work can help workers develop their skills and experience, thereby offering pathways into more secure employment.”\**

\* Source: Eurofound - Temporary Agency Work and Collective Bargaining in the EU | 2009

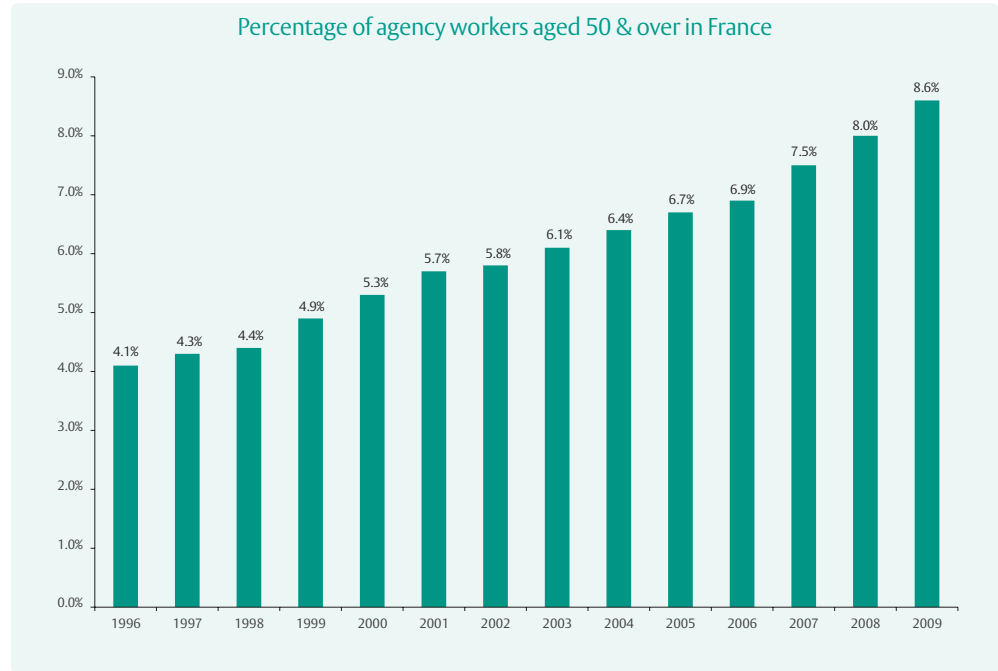
Age distribution of agency workers in Italy in 2004, 2006 & 2008



Source : Ebitemp 2009

## In France the proportion of older agency workers keeps on increasing

In France, the number of agency workers aged over 50 increases every year, and has more than doubled between 1996 [4.1%] and 2009 [8.6%]. This trend mirrors both the ongoing demographic crunch, with an ever ageing population, and the desire of older workers to remain active. The agency work industry helps these older workers to remain in the labour market, providing them with more flexible opportunities to meet their expectations.

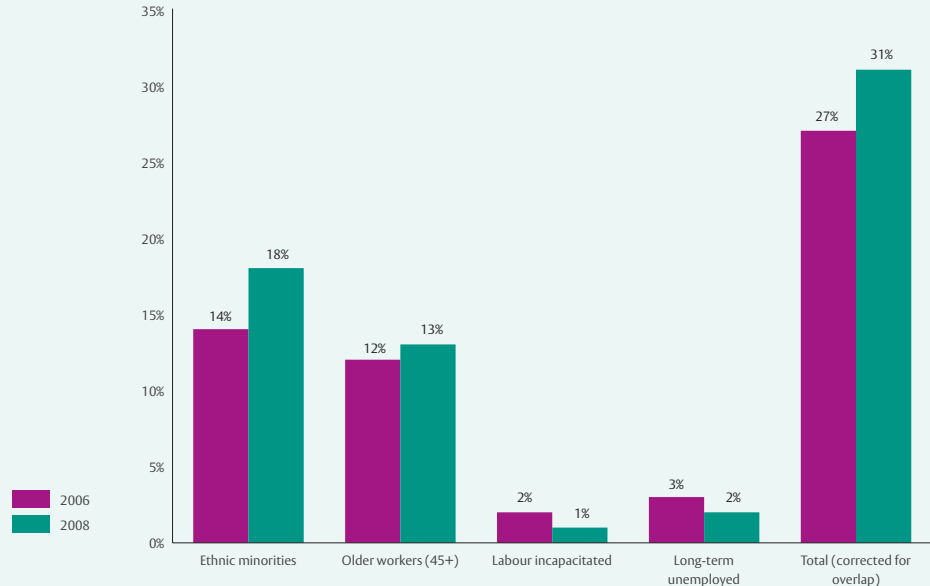


Source : Dares 2010

# Agency workers from target groups are on the rise in the Netherlands

Agency work gives “outsiders” a viable access to the labour market, thereby increasing labour market participation and diversity. Ethnic minorities, older people, labour incapacitated and the long term unemployed accounted for 31% of agency workers in the Netherlands in 2008. This is up from 27% in 2006. Agency work increases labour market flexibility, whilst providing basic rights and working conditions to agency workers. Because the agency remains the worker’s employer, his rights are capitalised from one assignment to the next. Agency work thus integrates “outsiders” in the labour market, who then benefit from the same working conditions as those provided to other agency workers.

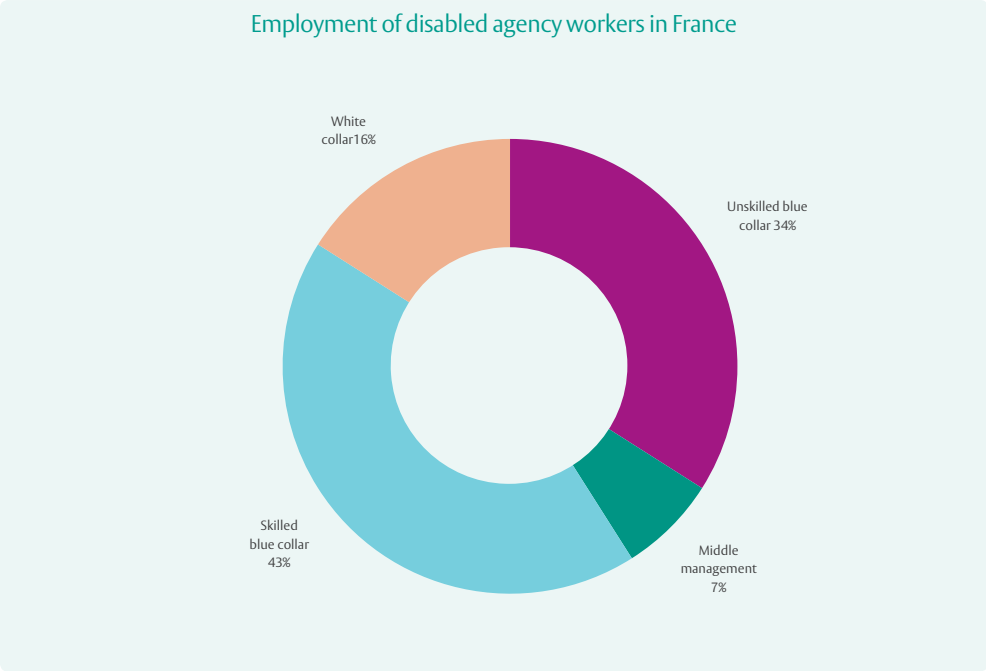
The percentage of special target groups among temporary employees in the Netherlands



Source: ABU/ECORYS 2009

# Disabled temporary agency workers take on a range of positions

In France, 43% of disabled workers are classified as skilled blue collar workers, while 7% occupy middle management positions. 16% are white collar employees and 34% are unskilled blue collar workers. Through private employment agencies, disabled agency workers are integrated at every level of companies.



Source : Prisme 2010



## 5. Companies' rationale to use temporary agency work

- Agency work improves companies' competitiveness.
- Agency work is not a substitute for permanent employment.
- Companies use agency work to meet peaks in demand or to fill in for absent employees.

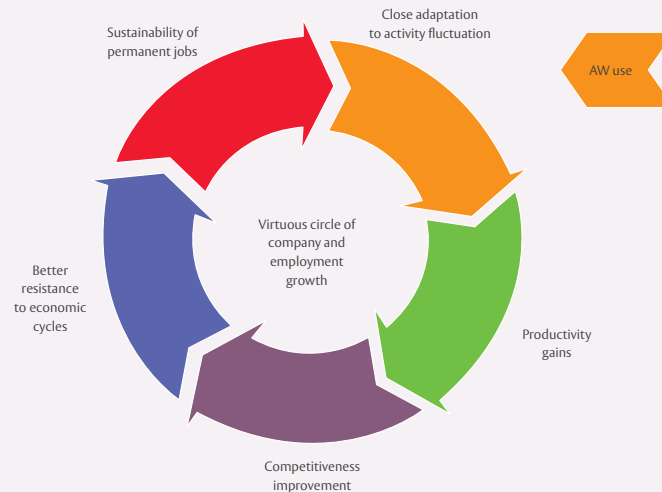
# Agency work improves companies' competitiveness

To remain competitive, organisations must improve their response to output fluctuations, by adapting their workforce and skills to changes in a competitive environment, and focusing on their core business. The range of services proposed by private employment agencies answers these challenges.

*“TAW enables user firms to make relatively easy labour adjustments and cost savings by outsourcing some responsibility for recruitment and administration.”\**

Source: Eurofound - Temporary Agency Work and Collective Bargaining in the EU | 2009

The use of agency work helps companies to improve competitiveness

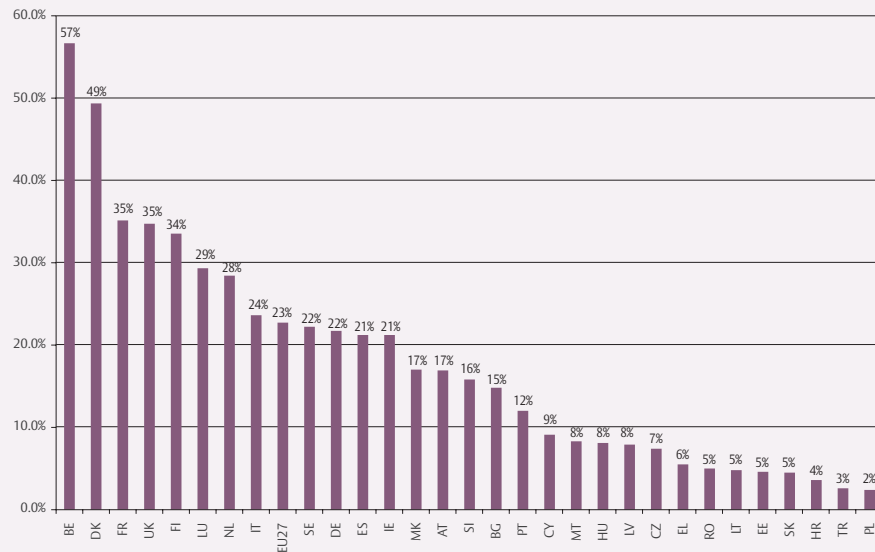


# 21% of European companies make use of temporary agency workers

COMPANIES' RATIONALE TO USE  
TEMPORARY AGENCY WORK

Across the EU, agency work is used by companies to remain competitive. In Belgium 57% of companies used temporary agency work at some point in 2009. The figure was also high in Denmark [49%], France [35%] and the UK [35%]. The figure is highest in countries with the most developed labour polices and lowest in countries which still need to enact labour market reforms.

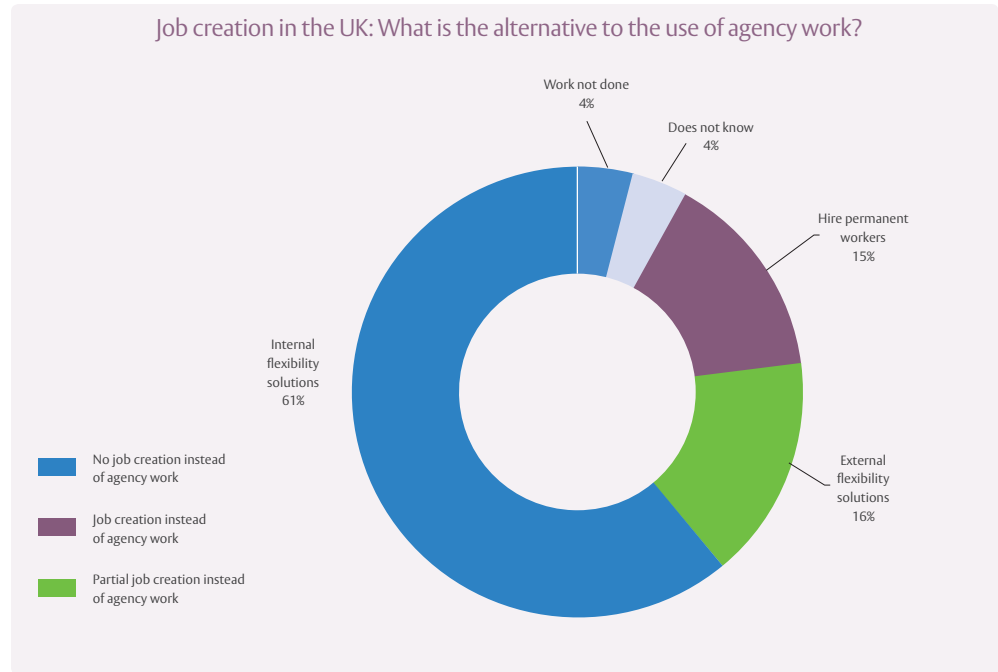
Companies employing temporary agency workers in 2009 (%)



Source: Eurofund - European Company Survey 2009

# Agency work is not a substitute for permanent employment

Research has shown that 80% of jobs created by agency work would not have existed if agency work were not an option. This confirms that agency work is not a substitute for permanent employment, notably because it does not meet the same needs, as it is generally used for specific flexibility requirements that cannot be covered by permanent contracts. The fact that long-term assignments are rare - and the persistently high turnover of agency workers - further supports this assumption. Any limited substitution effect must be assessed in a long-term perspective, as part of companies' overall HR strategy to integrate a flexible component into their workforce.



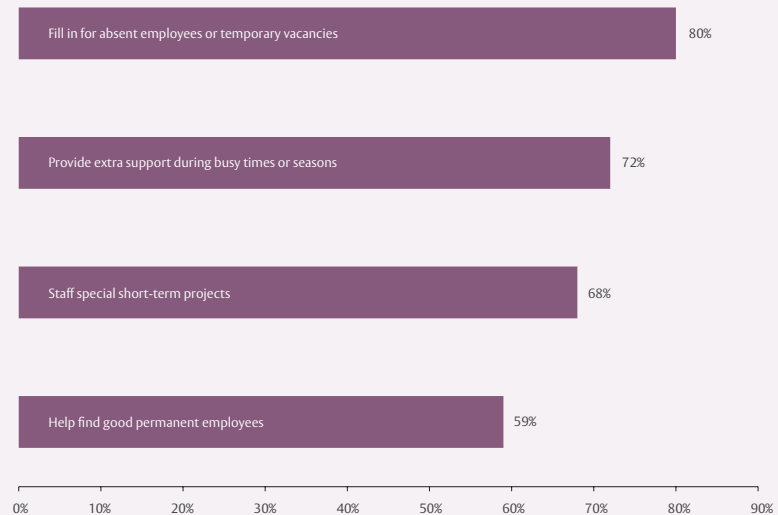
Source: Continental Research Corporate, Sept 2005

# In the USA the main reason to use agency workers is to fill in for absent employees or temporary vacancies

COMPANIES' RATIONALE TO USE  
TEMPORARY AGENCY WORK

By using agency workers, companies aim to minimise their exposure to risk when the near future seems uncertain. Once the outlook brightens, agency work helps companies to cope with sudden increases in demand or to face seasonal fluctuations. The use of agency workers is also an effective means of finding the right employee, whether to fill a permanent position, or to replace a worker leaving.

Main reason to hire agency workers in the USA



Source: American Staffing Association 2009

# In the UK the main reason to use agency workers is to meet peaks in demand

Three in five employers say that they use agency workers to fill a temporary position “always” or “most of the time”. The other most frequently used methods to cover for temporary vacancies are resorting to casual staff, followed by fixed term contract workers and increased over-time. The overall flexibility provided by agency work is a key argument for the services sector, whereas the manufacturing sector uses it to evaluate staff for permanent recruitment, or merely to help keep running costs down.

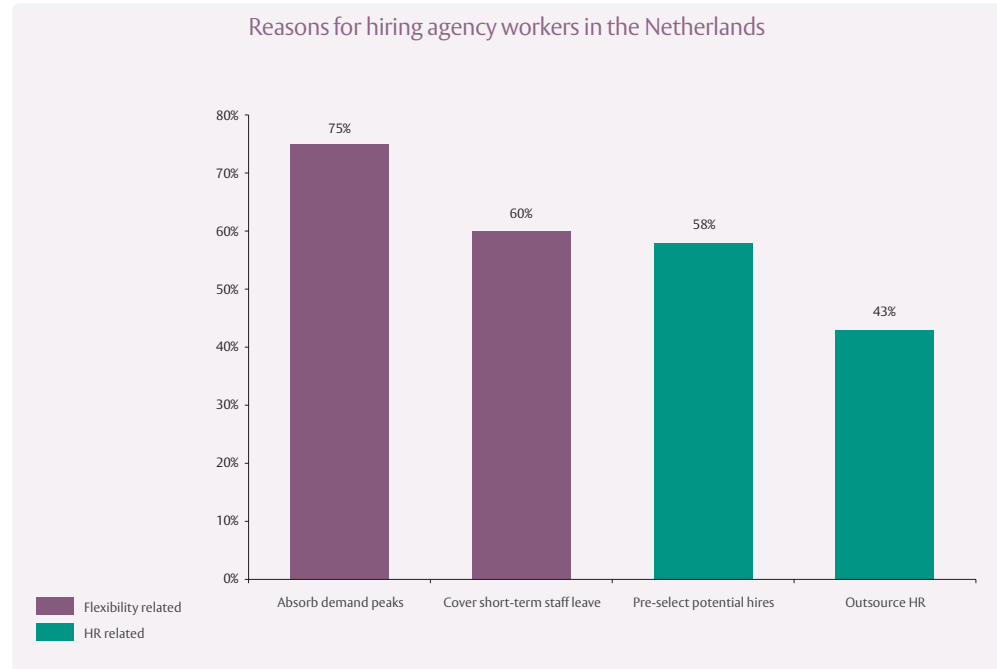


Source: REC / BERR Study 2008

# In the Netherlands the main reason to use agency workers is also to meet peaks in demand

COMPANIES' RATIONALE TO USE  
TEMPORARY AGENCY WORK

As an instrument for employers to adapt the size of their workforce to fluctuations in product demand, agency work is very sensitive to variations in the business cycle. In the Netherlands, companies use agency work for two primary reasons: to absorb peaks in demand and to cover for short-term staff leave. Agency work is considered the most appropriate solution to meet these flexibility-related needs. It is also seen as an alternative for many HR-related functions traditionally carried out internally by companies, thus allowing them to focus on their core activities.



Source: ABU 2005



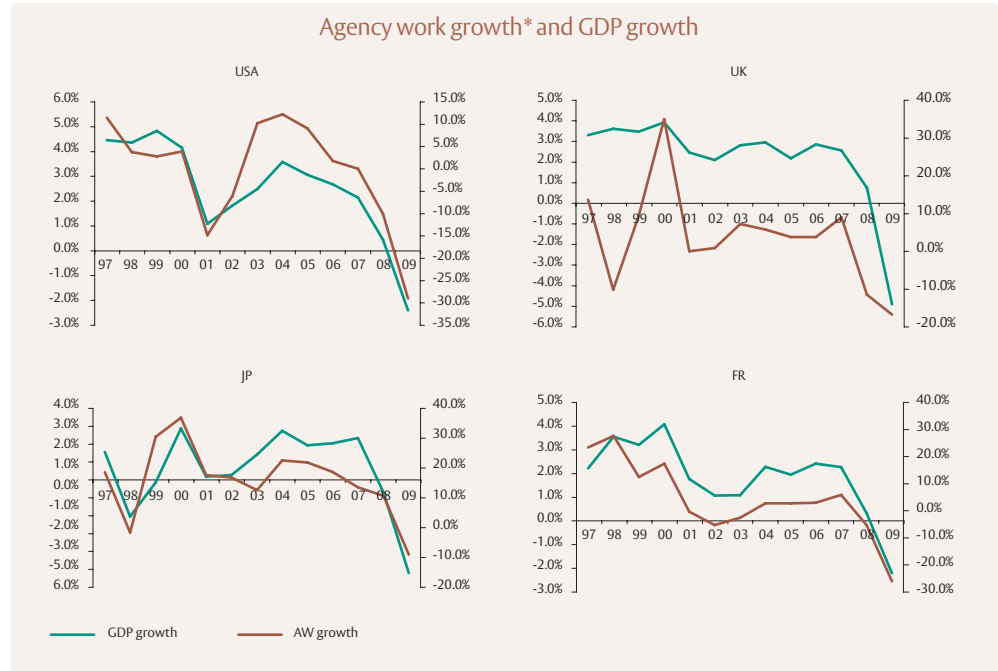


## 6. Agency work and the economic recovery

- Agency work is a bellwether of the economic situation.
- As a cyclical business - and a forecasting indicator - agency work has suffered from the economic crisis, but agency workers have been first to be hired when the economy recovers.
- Agency work limits the risk and duration of unemployment.
- The private employment agency industry has rebounded sharply since the recession ended.

# Agency work is a bellwether of the economic situation

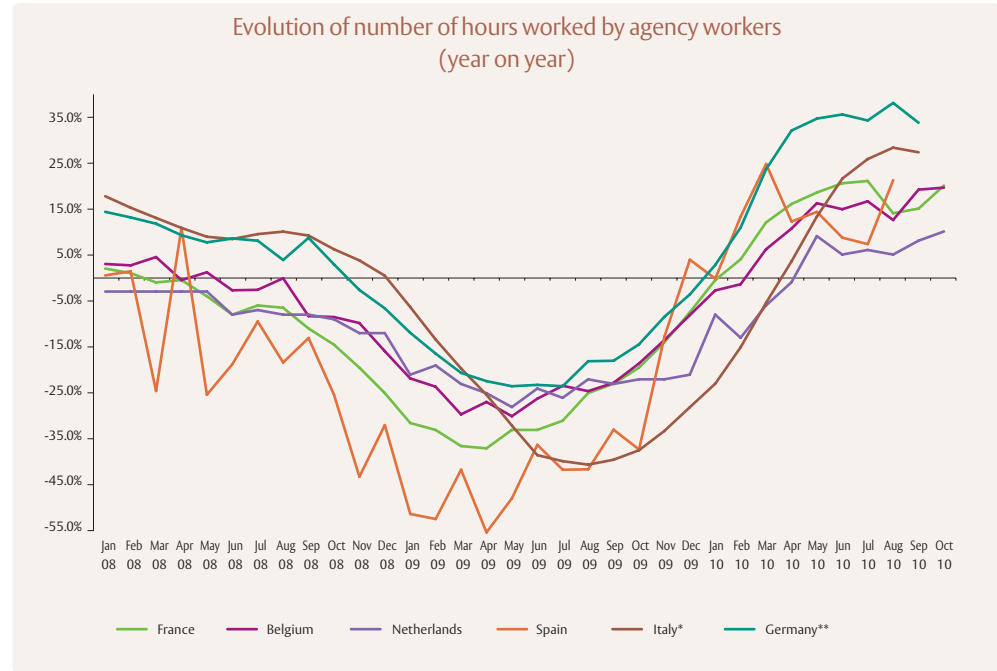
The use of agency work echoes the behaviour of the general economy. Various studies have confirmed that there is a direct correlation between variations in GDP and the level of use of agency work. In years of growth, the supply and demand of agency workers increase proportionally, and diminish when the economy falters. As a precise indicator of the economic situation, the evolution of the agency work industry is therefore monitored as such, as private employment agencies are the first impacted by the crisis.



Sources : Ciett National Federations, IMF 2010  
\*Evolution of turnover

# The agency work industry in Europe returned to growth in 2010

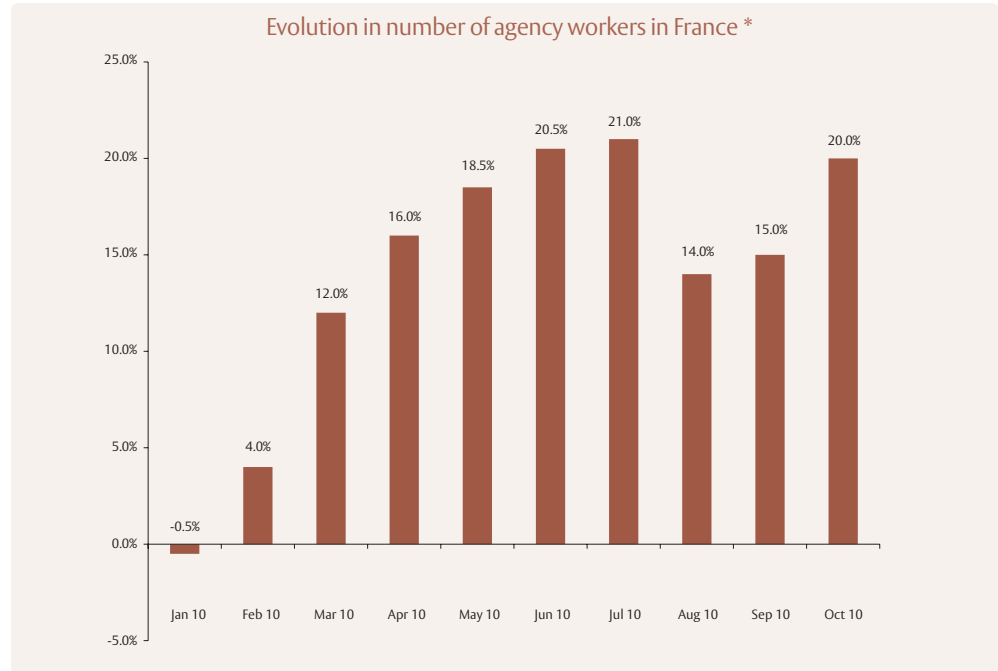
The crisis affected the different European agency work markets at different times, depending on the openness of their economies, the maturity of their markets, and their dependence on certain segments of the economy. Accordingly, a country like Germany which weathered the crisis better than most, can be seen to have surpassed the previous levels of temporary agency work achieved before the beginning of the crisis. This can be partly attributed to Germany's relatively low penetration rate. Indeed it highlights that Germany is taking advantage of this latent potential to begin economic growth again.



Source: Ciett National Federations 2010  
\* number of remunerated working days - \*\* total number of temporary agency workers

# Number of agency workers in France began to increase again in Feb 2010

The agency work industry in France began to grow again in February 2010, and the number of full time equivalent workers has risen compared with the same period in 2009 since that date. At the end of 2009 unemployment in France had reached 9.8%. The number of agency workers in France fell by 26%, from 604,000 in 2008 to 447,000 in 2009. The agency work penetration rate is now 1.7%, down from 2.2% in 2008.

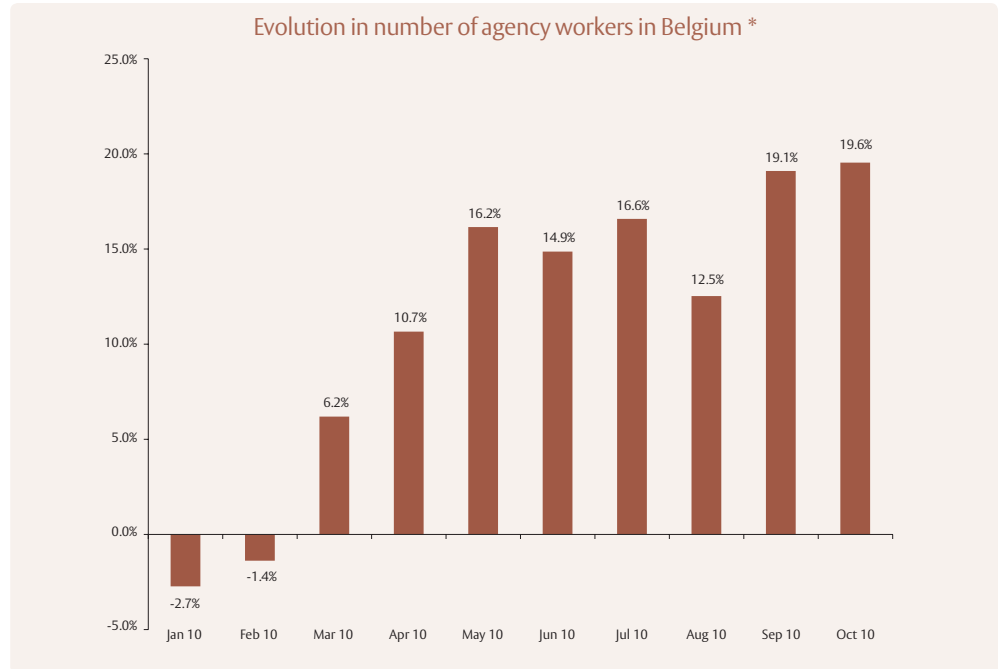


Source: Prisme 2010

\* in FTEs / percentage change year on year

# Number of agency workers in Belgium have been rising since March 2010

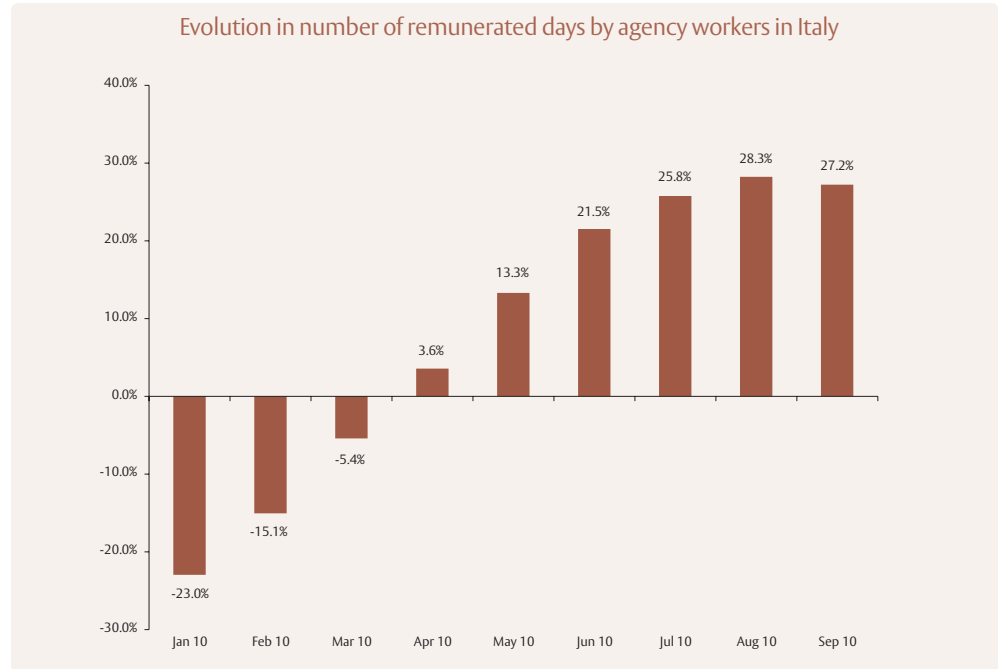
The agency work industry in Belgium grew by 6.2% [in terms of the number of full time equivalent workers employed] in March 2010 compared to the same period in 2009. This was the first growth in the Belgian agency work industry since it entered the crisis. The growth has continued steadily since that point with most recent figures pointing to a rise of 19.1% in September 2010 compared with September 2009.



Source: Federgon 2010  
\* in FTEs / percentage change year on year

# The Italian agency work industry began growing again in February 2010

The Italian agency work industry began to grow again in April 2010. It noted an increase of 3.6% in the number of remunerated days by agency workers compared with April 2009. Growth has continued steadily since that point. The impact of the crisis on the Italian labour market was relatively mild in 2008 but grew in strength in 2009. The Italian agency work market was also hit later than other European countries. This is partially due to regulatory changes introduced in 2001, 2004 and 2006 that helped liberalise the market, thereby cushioning the initial impact of the crisis on the industry.

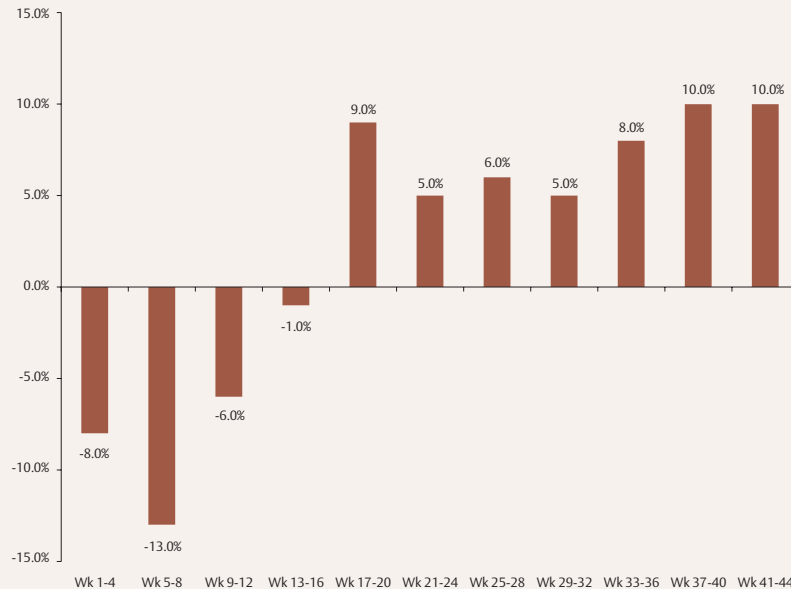


Source: Ebitemp 2010  
\*percentage change year on year

# The agency work industry returned to growth later in the Netherlands than in other European countries

The Agency work industry in the Netherlands returned to growth in period 5 (May) of 2010 with a growth rate of 9% in hours worked compared with the same period in 2009. The Netherlands returned to growth later than other European countries and at a lower rate. It must be noted however that the crisis hit the Netherlands later and the industry suffered less than in other countries (the industry decreased by 13.5% in 2009).

Evolution in number of agency workers in the Netherlands \*

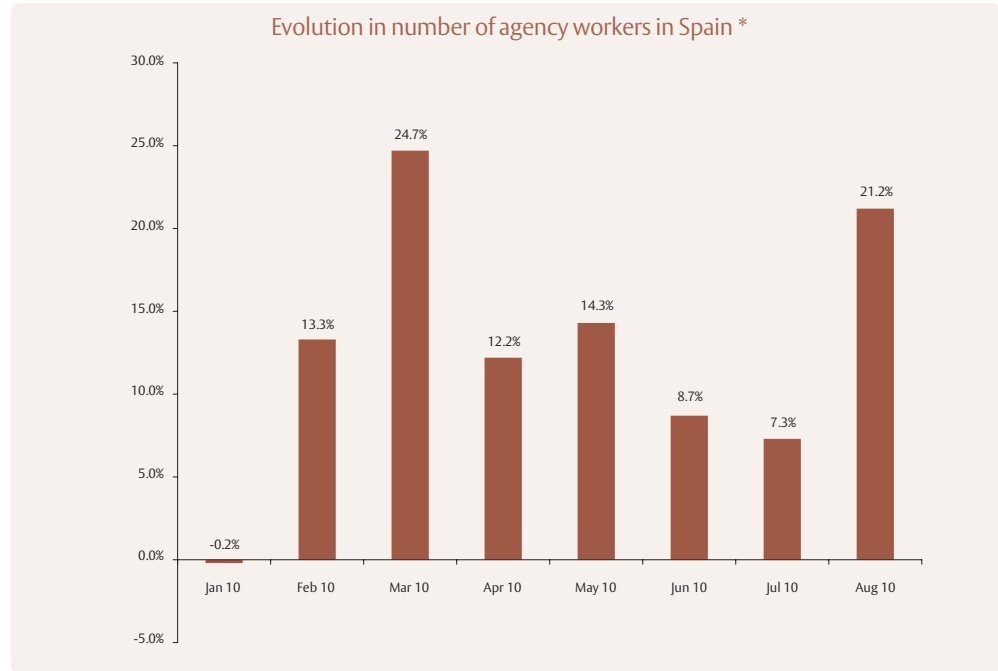


Source ABU 2010

\* in FTEs / percentage change year on year

# The Spanish agency work industry returns to growth strongly, following crisis

In 2010, the Spanish agency work industry began to grow again in February 2010 and continued to do so throughout the year. In 2009, Spain was heavily hit by the global economic crisis. As one of the fastest growing economies in recent years, its impact was all the more significant. Unemployment climbed to over 19% in December 2009.



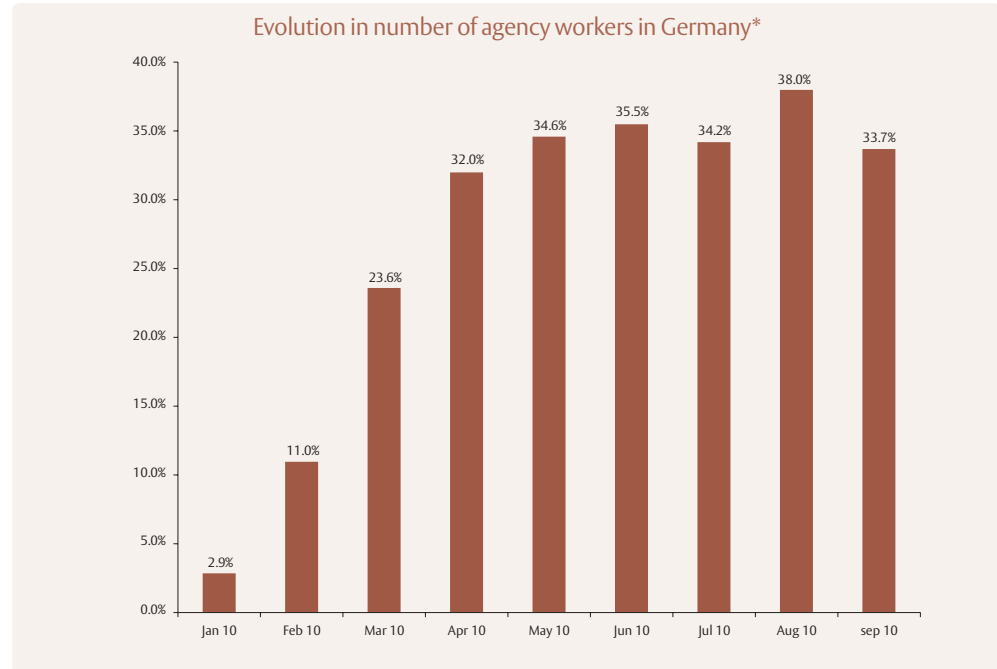
Source: AGETT 2010

\* in FTEs / percentage change year on year



# The number of agency workers in Germany returned to pre-crisis levels in 2010

Germany's agency work industry began to grow again as early as January 2010 and in September 2010, the German agency work industry returned to pre-crisis levels of employment. This can be partly attributed to Germany's relatively young and still immature market in comparison with other major economies.



Source BZA 2010

\* Total number of workers/ percentage change year on year

# The American agency work market began to recover earlier than the industry in Europe

American economic activity measured by employment peaked in December 2007. Since then, it has lost jobs until mid 2009 when it began to grow again. But even though the decline in agency work occurred later, it rapidly outpaced that of the American workforce at large, as it played its role of buffer, cushioning the impact on permanent staff. The strong recovery of the industry points that in the recovery, agency workers are among the first to be hired.

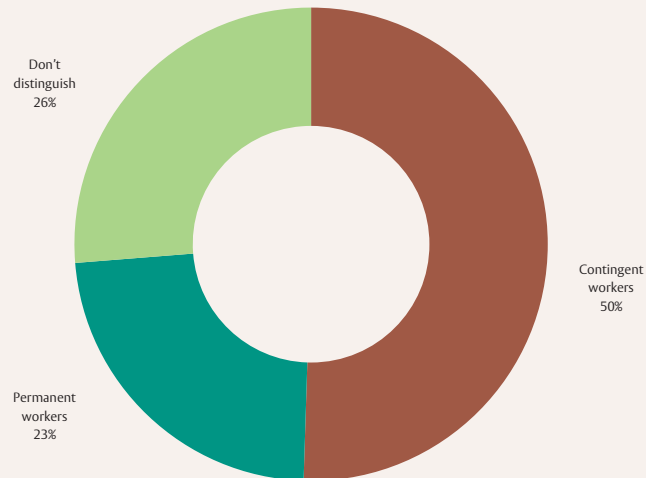


Source: American Staffing Association 2010

# Agency workers are the first hired when business recovers

The agency work industry can quickly call upon a large pool of workers, and provide organisations with appropriate workers to better manage competitive pressures. As a result, the agency work industry is among the first to create jobs as soon as the economy recovers, as companies first hire agency workers to meet an increase in orders, before recruiting permanent staff when the situation stabilises. As Pat McFadden - Former UK Minister of State for Employment Relations - said: "Agency work is a valued route into employment and plays a vital role in enabling employers to respond flexibly to changing business needs - and are likely to be particularly important in enabling employers and employees to take full advantage of the upturn."

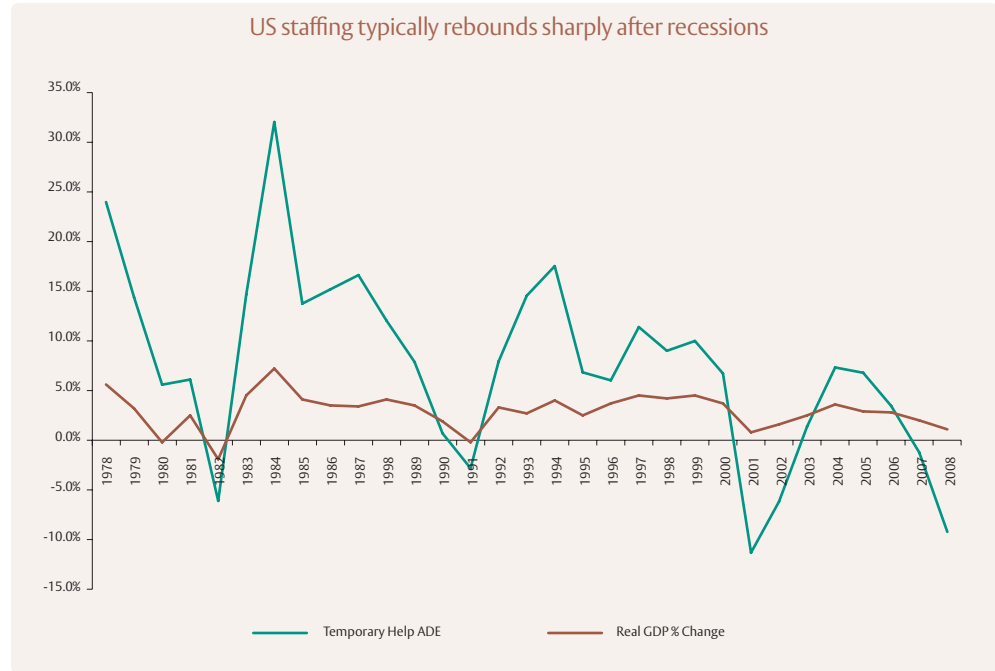
When business recovers, which workers do you typically hire first ?



based on a survey of buyers from 171 large [1000+ employee] companies  
Source: Staffing Industry Analysts 2009 - [www.staffingindustry.com](http://www.staffingindustry.com)

# Agency work typically rebounds sharply after recessions

The agency work industry not only creates jobs that would not otherwise exist, but it also accelerates the number of jobs created once the economy recovers. Historically, PrEAs are among the first to create jobs in economic upswings, enjoying double-digit growth rates when the economy emerges from a recession. As business picks up, companies first hire temporary help, before recruiting permanent staff once business has stabilised. Since 1990, the growth rate of agency work sales revenues in the USA has exceeded GDP growth by more than 2.5 times.



Source: American Staffing Association 2009



# About Ciett

As the International Confederation of Private Employment Agencies, Ciett is the authoritative voice representing the interests of private employment agency industry across the world.

Founded in 1967, Ciett consists of 44 national federations of private employment agencies and seven of the largest staffing companies worldwide: Adecco, GI Group, Hudson, Kelly Services, Manpower, Randstad, and USG People.

Its main objective is to help its members conduct their businesses in a legal and regulatory environment that is positive and supportive.

Ciett is divided into five regional organisations: Africa, Asia [AsiaCiett], North America, South America [CLETT&A], and Europe [Eurociett].



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South Africa | APSO

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China | CAFST  
Japan | JASSA  
South Korea | KOSA

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Mexico | AMECH  
USA | ASA

### South America

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Brazil | SINDEPRESTEM  
Chile | AGEST  
Colombia | ACOSET  
Perú | AETT Perú

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Belgium | FEDERGON  
Bulgaria | BG Staffing  
Czech Republic | APPS  
Denmark | Dansk Erhverv  
Estonia | ESAA  
Finland | HPL  
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