



The agency work industry around the world

2010 Edition

(based on figures available for 2008)



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ECONOMIC REPORT

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Introduction

In 2008, the global agency work industry began to feel the brunt of the economic downturn that started in the USA and quickly spread to the rest of the world. Depending on the openness and the socio-economic fabric of their economies and the flexibility of their labour markets, certain countries were hit harder than others, and some still continued to grow.

Overall, the total number of agency workers worldwide fell by a mere 1% in 2008, compared to 2007, amounting to just over 9.5 million full-time equivalents on a daily basis. In parallel, global total annual sales revenues also fell by 1%, amounting to €232 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. The tepid

economic recovery spreading across most developed economies at the end of 2009 is still judged too anaemic to stop the continuing rise in unemployment, expected to peak in the USA in the first half of 2010, and to continue to rise in Europe till 2011.

In 2008, some markets, such as Japan and Germany, continued to grow, still benefiting from recently introduced regulatory changes that improved labour market flexibility and cushioned the impact of the crisis. Nascent global powerhouses, such as Brazil and South Africa, also continued to grow, boosted by their rapidly expanding economies, which were only temporarily setback by the crisis. However, more mature markets, such as the USA and the UK, already witnessed stark declines. Agency work plays - and still has the

potential to play further - a valuable role in easing transitions within and to 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 more troubled times, 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 also prepares 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 once 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 and providing more work opportunities for more people.

The key facts & figures

The players

- There are 71,000 private employment agencies and 171,000 branches worldwide, employing 819,000 internal staff
- In 2008 the total annual sales revenues of the top 10 private employment agencies worldwide accounted for 33% of the total agency work market
- In 2008 the global total annual sales revenues amounted to €232 billion, down 1% from 2007
- Japan and the USA are the world leaders by total annual sales revenues, each representing 21% of the global agency work market, followed by the UK at 15%
- Europe is the leading regional entity by total annual sales revenues, accounting for 48% of global total annual sales revenues

Agency workers in numbers

- In 2008 just over 9.5 million agency workers in full-time equivalents were employed by private employment agencies across the globe, down 1% from 2007
- The agency work penetration rate is 2.2% in Japan and 1.7% in Europe and the USA
- On average agency workers work nearly half as much as full-time permanent employees
- Most agency work assignments are more than one month long

The profile of agency workers

- More than 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
- Between 2003 and 2006 the private employment agency industry created 669,000 net additional jobs in Europe
- 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
- It 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

Impact of the economic crisis

- 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 will be the first ones to be hired when the economy recovers
- Agency work limits the risk and duration of unemployment
- The private employment agency industry typically rebounds sharply after recessions

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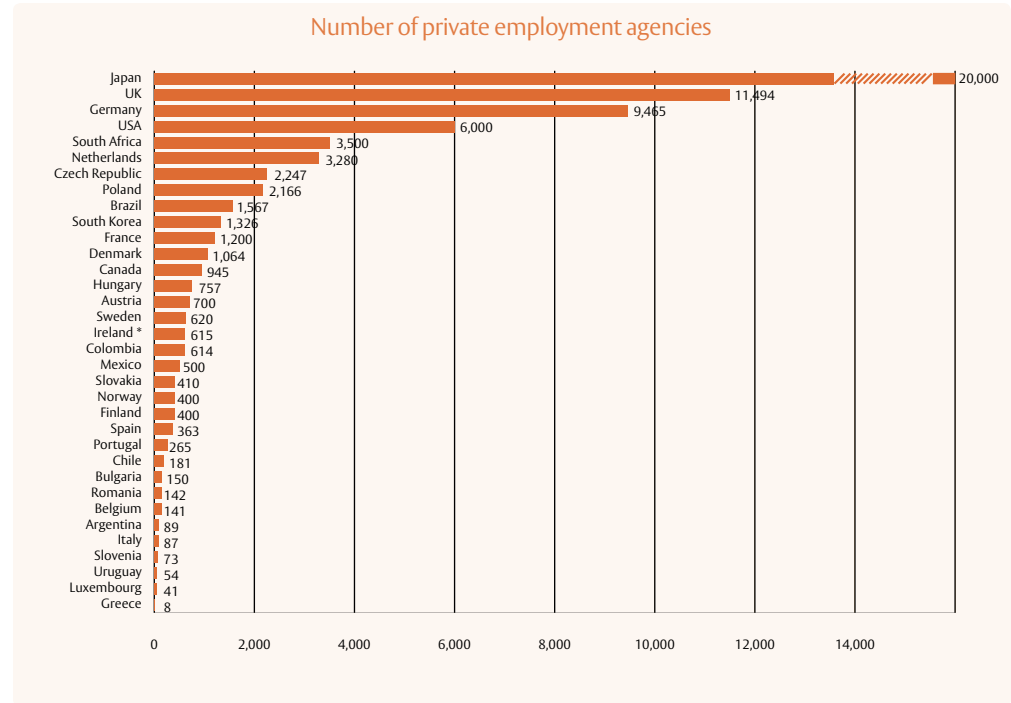
1. The players

- There are 71,000 private employment agencies [PrEAs] worldwide, with 171,000 branches and 819,000 persons as internal staff.
- Global total annual sales revenues amounted to €232 billion in 2008.
- Total annual sales revenues for the top 10 PrEAs account for 33% of the global agency work market.
- Japan and the USA are the global leaders by total annual sales revenues, accounting for 21% of the world market each, followed by the UK [15%].
- Europe is the leading regional entity by total annual sales revenues, accounting for 48% of the global market.

There are 71,000 private employment agencies...

From 2007 to 2008 the number of private employment agencies increased by 14% to reach 71,000. Europe accounts for 51% of all PrEAs, the Asia/Pacific region for 30%, and North America for 11%. Japan, Germany and the UK are the top three countries in terms of number of PrEAs, accounting collectively for 58% 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.”*

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



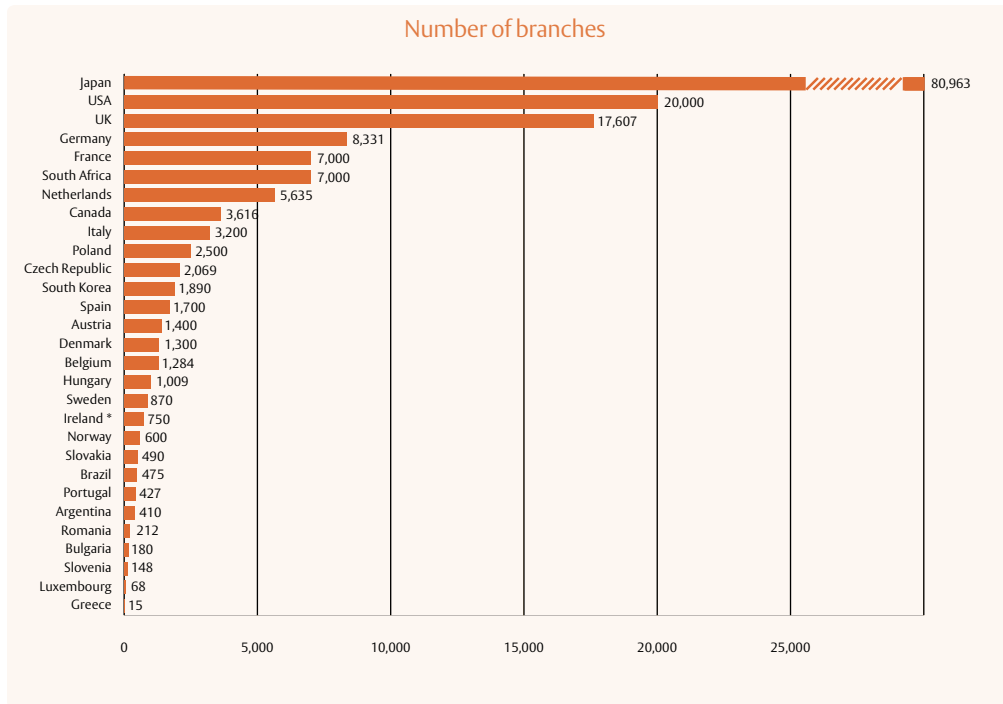
* Figures for 2007

...with 171,000 branches worldwide

THE PLAYERS

From 2007 to 2008 the number of branches increased by 14% to attain 171,000; the Asia/Pacific region accounting for 48%, Europe for 33%, and North America for 14%. Japan, the USA, and the UK are the top three countries by number of branches, accounting together for 69% of all branches worldwide.

The “branch to PrEA” ratio varies greatly from country to country, from a staggering 36.8 branches per PrEA in Italy to just 1.2 in Poland. 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, in contrast to highly fragmented markets, such as Poland, characterised by a large number of PrEAs, often operating from a single local branch. The global average is 2.4 branches per PrEA.

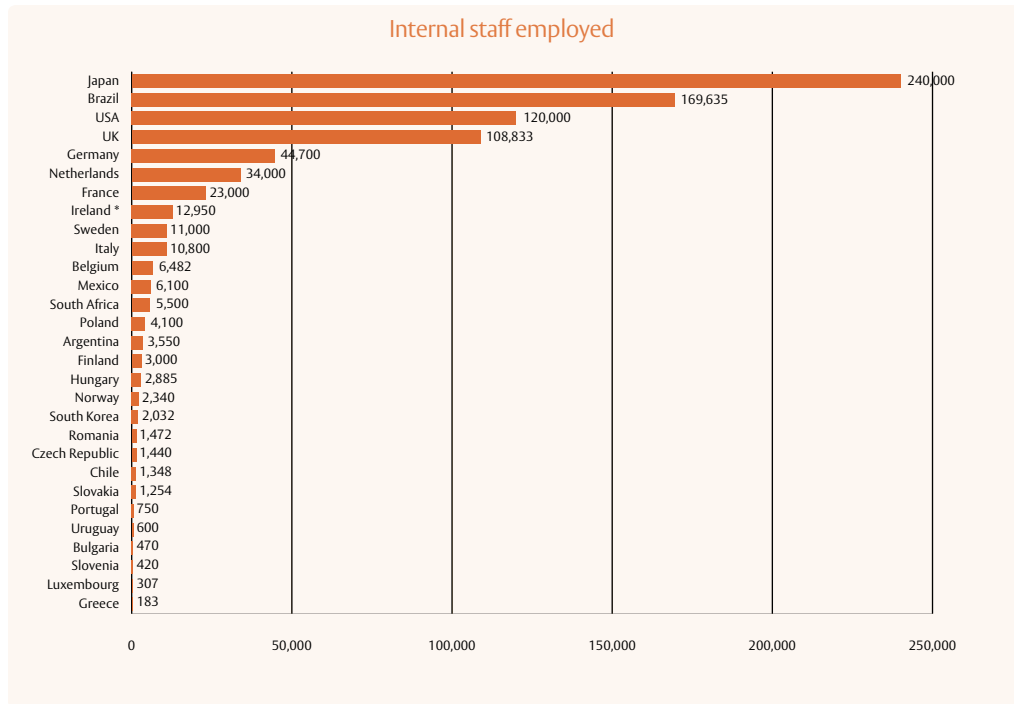


* Figures for 2007

819,000 people were employed as internal staff by PrEAs in 2008

From 2007 to 2008 the number of internal staff [HR consultants and back-office people working in branches] increased by 7% to reach 819,000. Europe accounts for 33%, the Asia/Pacific region for 30%, and South America for 21%. 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 5 people employed as internal staff per branch, and 12 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.



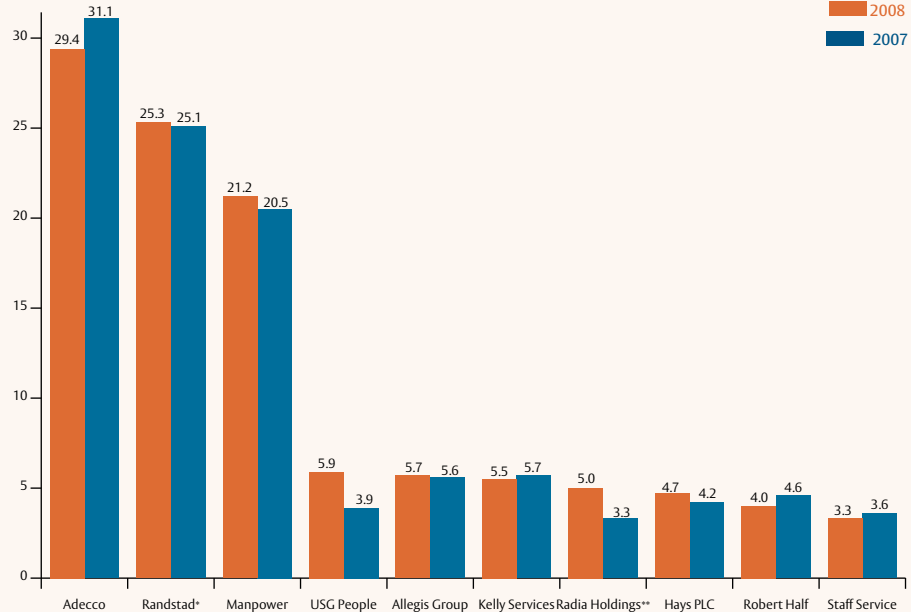
* Figures for 2007

The top 10 PrEAs worldwide accounted for 33% of global annual sales revenues in 2008

THE PLAYERS

In 2008 some of the main global players began to feel the pinch of the economic crisis. Adecco, with \$29.4 billion in total annual sales revenues, remains the market leader. The merger of Randstad with Vedior in 2008 created the second largest PrEA worldwide with \$25.3 billion, followed by Manpower with \$21.2 billion.

Top 10 staffing companies in billions of \$*



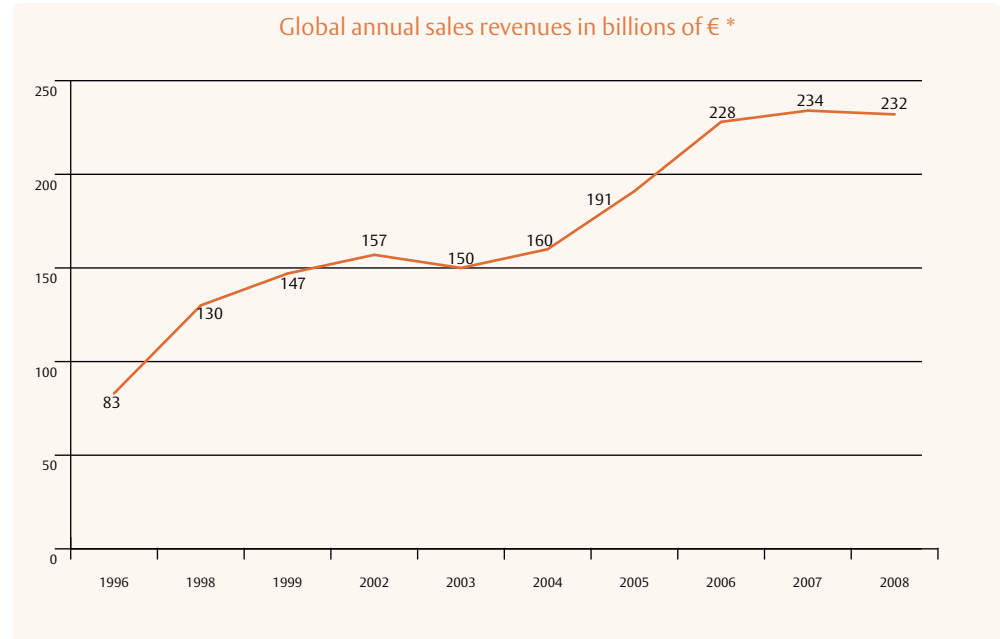
Source: Staffing Industry Analysts 2009 - www.staffingindustry.com

* Consolidated figures for Randstad and Vedior for 2007

** Formerly known as the Goodwill Group

Global total annual sales revenues reached € 232 billion

In 2008, the global total annual sales revenues for the agency work industry amounted to €232 billion, a decline of 1% compared to 2007, reflecting the beginning of the impact of the crisis on major economies, such as the USA and the UK. The exchange rate from the US dollar to the Euro [0.68341] also had a negative impact on the calculation of the American total annual sales revenues.



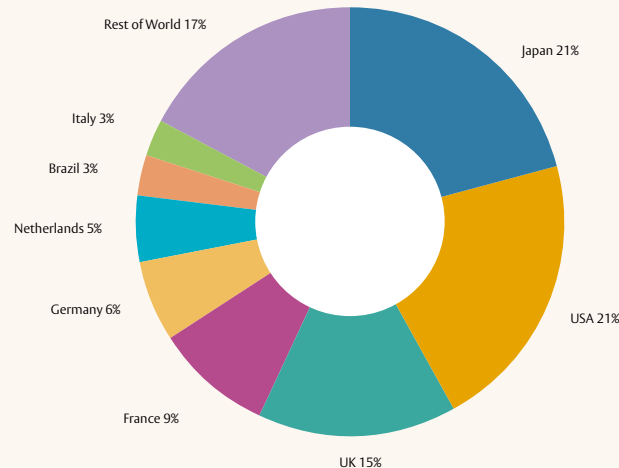
* USD to EUR exchange rate of 0,68341

In 2008, Japan and the USA are global agency work market leaders by total annual sales revenues

THE PLAYERS

In 2008, Japan and the USA are world agency work market leaders by total annual sales revenues, both accounting for 21%. The UK remains the third largest market worldwide with 15% of global total annual sales revenues. As a region, Europe accounts 48% of global total annual sales revenues, North America for 24%, and the Asia/Pacific region for 23%.

Agency work global sales revenues split per country



Japan, the USA, and the UK are the three largest agency work markets in 2008

Japan, the USA, and the UK together account for 53% of PrEAs worldwide, 69% of branches, 57% of internal staff, 57% of total annual sales revenues, and 55% 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 PrEAs that operate locally. Japan has the lowest “agency worker to branch” and “agency worker to internal staff” ratios. These figures must be assessed carefully, bearing in mind that there might be a significant amount of dormant agencies in Japan, and that Japanese agency workers work an exceptional 80% of the average annual hours worked by a Japanese employee with a full-time open-ended contract.

Comparison of the 3 largest agency work markets in the world

	Japan	USA	UK
Number of PrEAs	20,000	6,000	11,494
Number of branches	80,963	20,000	17,607
Number of agency workers	1,400,000	2,660,000	1,220,310
Number of internal staff	240,000	120,000	108,833
Branch to PrEA ratio	4.0	3.3	1.5
Internal staff to branch ratio	3.0	6.0	6.2
Agency worker to branch ratio	17	133	69
Agency worker to internal staff ratio	6	22	11
Country's share of total global annual sales revenues	21%	21%	15%
AW penetration rate	2.2%	1.7%	4.1%

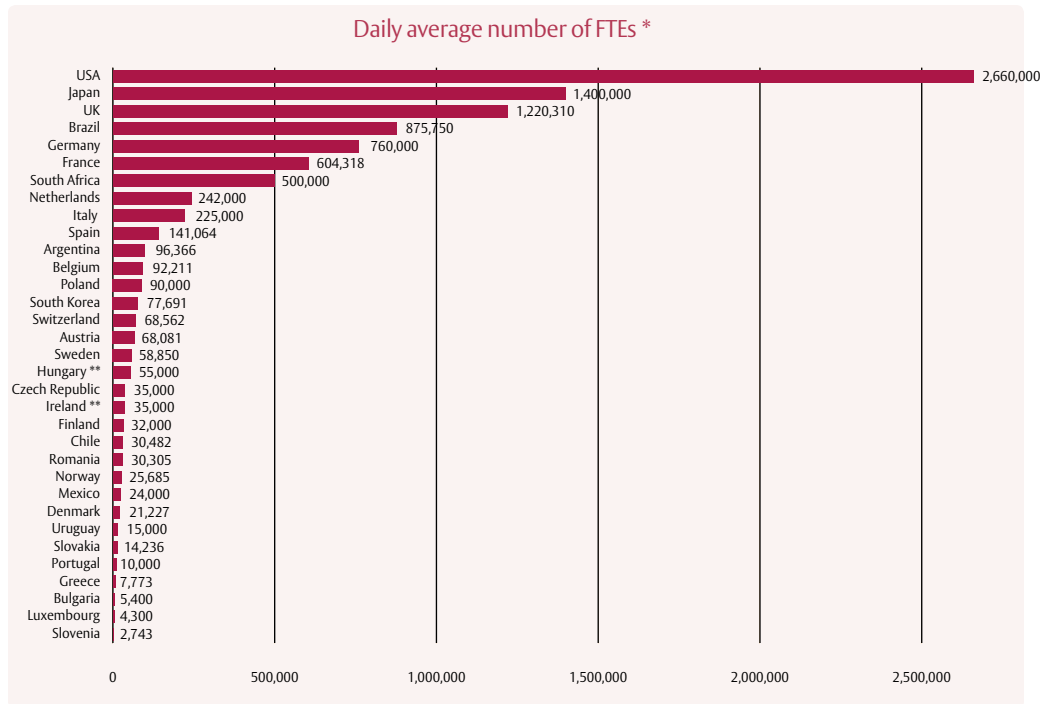
2. Agency workers in numbers

- 9.5 million agency workers in full-time equivalents were employed in 2008.
- The number of agency workers has nearly doubled from 1998 to 2008.
- In 2008 the European average penetration rate of agency work was 1.7% and the South American average 0.9%.
- In 2008 the Japanese and American agency work penetration rates were respectively 2.2% and 1.7%.
- Agency workers work nearly half as much as full-time permanent employees.
- Most agency work assignments are more than one month long.

9.5 million agency workers were employed in 2008

In 2008 the total number of agency workers worldwide amounted to just over 9.5 million in full-time equivalents, a decrease of 1% compared to 2007. Europe accounts for 41%, North America for 28%, and the Asia/Pacific region for 15%.

The USA employs as many agency workers in full-time equivalents [2.66 million] than the second and third biggest suppliers of agency workers combined, respectively Japan with 1.4 million, and the UK with 1.22 million. Together, the USA, Japan, and the UK account for 55% of all agency workers assigned worldwide. Brazil is the fourth largest market in the world with 875,750 agency workers in full-time equivalents, ahead of Germany [760,000], France [604,318], and South Africa [500,000].



* 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 2007

The number of agency workers has nearly doubled from 1998 to 2008

AGENCY WORKERS IN NUMBERS

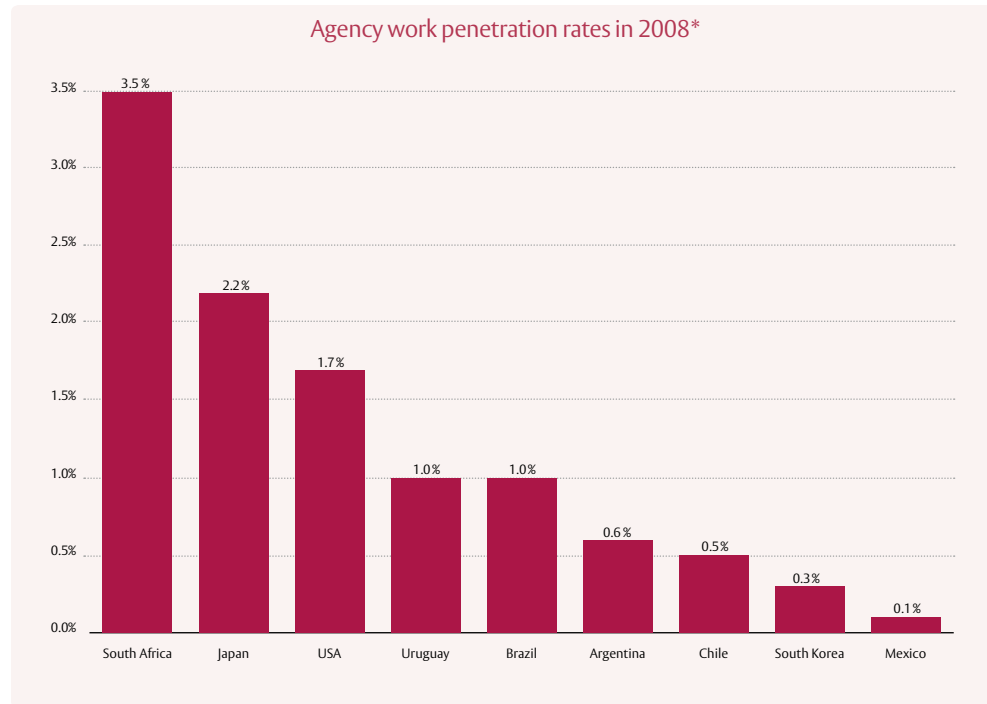
The number of agency workers worldwide increased from close to 4.8 million full-time equivalents in 1998 to just over 9.5 million in 2008. In the last ten years, the number of agency workers in Europe has more than doubled, partially as a result of the progressive liberalisation of certain tightly regulated 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 1998 and 2008, 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)													
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
EUROPE													
Austria	15	18	21	24	30	33	31	38	44	47	59	67	68
Belgium	44	51	60	63	71	68	66	66	73	78	88	95	92
Bulgaria	na	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	na	35
Denmark	5	6	7	7	8	10	10	11	13	17	21	17	21
Finland	9	9	9	8	9	11	11	12	14	16	18	28	32
France	291	359	458	515	604	602	570	555	570	586	603	638	604
Germany	176	201	246	276	328	341	318	330	385	444	580	715	760
Greece	na	na	na	na	na	na	na	na	na	na	na	8	8
Hungary	ns	ns	ns	ns	ns	ns	30	39	53	54	55	55*	55*
Ireland	3	4	9	10	25	25	25	25	25	25	30	35	35*
Italy	nlr	nlr	10	26	69	67	82	132	154	157	184	222	225
Luxembourg	2	2	2	3	4	4	4	4	4	4	5	5	4
Macedonia	na	na	na	na	na	na	na	na	na	na	2	2*	2*
Netherlands	147	163	180	186	183	178	169	154	157	176	207	233	242
Norway	7	9	11	11	11	12	11	10	12	15	24	25	26
Poland	ns	ns	ns	ns	ns	ns	ns	19	25	27	35	60	90
Portugal	25	29	33	45	45	45	45	45	45	45	45	45	45
Romania	na	na	na	na	na	na	na	na	na	na	na	na	30
Slovakia	ns	ns	ns	ns	ns	ns	ns	ns	11	na	na	na	14
Slovenia	na	na	na	na	na	na	na	na	na	na	na	na	3
Spain	60	90	110	133	133	126	123	123	124	130	141	160	141
Sweden	10	14	18	24	42	38	37	29	30	32	37	59	59
Switzerland	21	24	30	34	39	38	37	36	41	49	61	70	69
UK	682	775	696	761	1,027	1,027	1,036	1,111	1,175	1,219	1,265	1,378	1,220
Sub-Total Europe	1,497	1,754	1,900	2,126	2,629	2,625	2,605	2,739	2,955	3,120	3,460	3,917	3,885
Rest of World													
Argentina	36	43	47	46	48	47	34	54	70	81	88	96	96
Brazil	na	na	na	na	na	na	na	na	na	na	800	859	876
Chile	na	na	na	na	na	na	na	na	na	na	86	33	30
Japan	298	340	307	395	537	612	693	743	890	1,060	1,220	1,330	1,400
Mexico	na	na	na	na	na	na	na	na	na	na	na	25	24
South Africa	ns	ns	ns	ns	ns	ns	ns	ns	ns	300	300	300	500
South Korea	ns	ns	ns	ns	ns	ns	ns	na	50	57	66	75	78
Uruguay	na	na	na	na	na	na	na	na	na	na	na	na	15
USA	2,190	2,440	2,530	2,600	2,700	2,300	2,160	2,380	2,670	2,910	2,960	2,960	2,660
Sub-Total Rest of world	2,524	2,823	2,884	3,041	3,285	2,959	2,887	3,177	3,680	4,408	5,520	5,678	5,679
TOTAL WORLD	4,021	4,577	4,784	5,167	5,914	5,584	5,492	5,916	6,635	7,528	8,980	9,595	9,564

ns: not 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 0.9% 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 grew steadily from 1996 to 2007

AGENCY WORKERS
IN NUMBERS

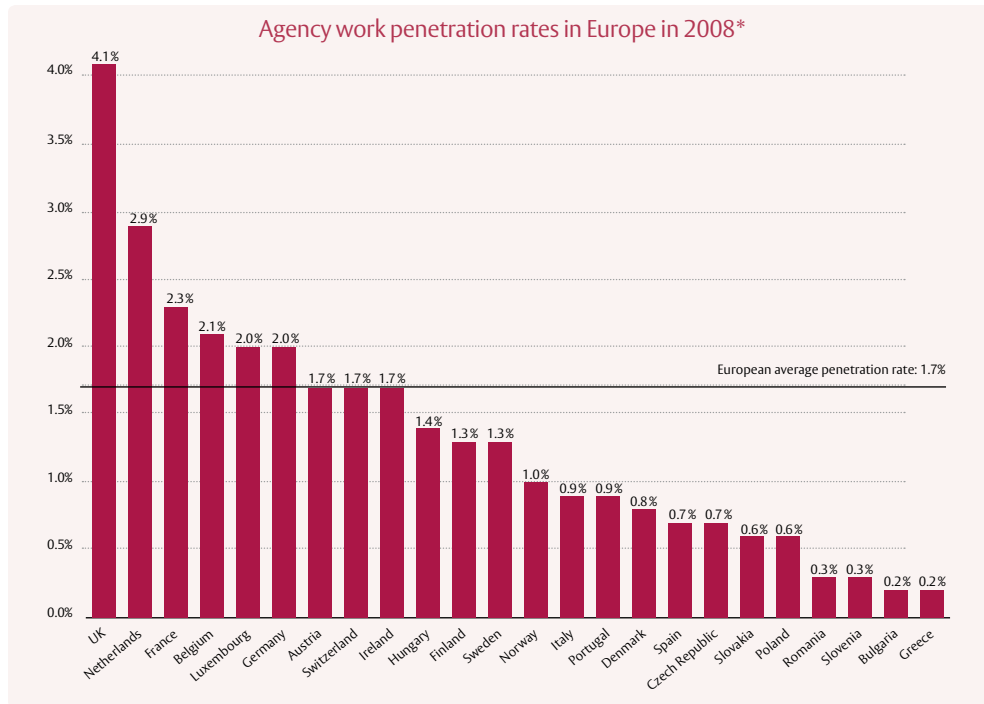
In Europe, the level of regulation and degree of economic development explain the differences in pace of growth of the agency work industry. Recently, countries such as Germany and Poland have revealed their potential, but each for very different reasons: Germany as a heavily-industrialised economy, slowly freeing itself of very strict regulatory measures, and Poland as a budding regional leader, rapidly catching up its Western European counterparts.

European agency work penetration rates since 1996													
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Austria	0.4%	0.5%	0.6%	0.7%	0.8%	0.9%	0.8%	1.0%	1.2%	1.2%	1.5%	1.5%	2.0%
Belgium	1.2%	1.3%	1.6%	1.6%	1.7%	1.7%	1.6%	1.6%	1.8%	1.9%	2.1%	2.2%	2.1%
Bulgaria	na	na	na	na	na	na	na	na	na	na	na	na	0,2%
Czech Republic	na	na	na	na	na	na	na	na	na	na	na	na	0,7%
Denmark	0.2%	0.2%	0.3%	0.3%	0.3%	0.4%	0.4%	0.4%	0.5%	0.6%	0.8%	0.8%	0,8%
Finland	0.4%	0.4%	0.4%	0.3%	0.4%	0.5%	0.5%	0.5%	0.6%	0.7%	0.7%	1.1%	1,3%
France	1.3%	1.6%	2.1%	2.3%	2.6%	2.5%	2.4%	2.3%	2.4%	2.4%	2.4%	2.5%	2,3%
Germany	0.4%	0.5%	0.6%	0.7%	0.8%	0.8%	0.7%	0.8%	0.9%	1.0%	1.3%	1.6%	2,0%
Greece	na	na	na	na	na	na	na	na	na	na	na	0,2%	0,2%
Hungary	ns	ns	ns	ns	ns	ns	0.8%	1.0%	1.4%	1.4%	1.4%	1.4%	1,4%
Ireland	0.2%	0.3%	0.6%	0.6%	1.5%	1.5%	1.4%	1.4%	1.4%	1.3%	1.5%	1.7%	1,7%
Italy	nlr	nlr	0.0%	0.1%	0.3%	0.3%	0.4%	0.6%	0.7%	0.7%	0.7%	1.0%	0,9%
Luxembourg	1.2%	1.2%	1.2%	1.7%	1.9%	2.0%	2.2%	2.3%	2.1%	2.3%	2.4%	2.4%	2,0%
Netherlands	2.1%	2.3%	2.4%	2.5%	2.3%	2.2%	2.1%	1.9%	1.9%	2.2%	2.5%	2.8%	2,9%
Norway	0.3%	0.4%	0.5%	0.5%	0.5%	0.9%	0.5%	0.4%	0.5%	0.7%	1.0%	1.0%	1,0%
Poland	ns	ns	ns	ns	ns	ns	ns	0.1%	0.2%	0.2%	0.3%	0.4%	0,6%
Portugal	0.6%	0.6%	0.7%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0.9%	0,9%
Romania	na	na	na	na	na	na	na	na	na	na	na	na	0,3%
Slovakia	na	na	na	na	na	na	na	na	na	na	na	na	0,6%
Slovenia	na	na	na	na	na	na	na	na	na	na	na	na	0,3%
Spain	0.5%	0.7%	0.8%	0.9%	0.9%	0.8%	0.7%	0.7%	0.7%	0.7%	0.7%	0.8%	0,7%
Sweden	0.3%	0.4%	0.5%	0.6%	1.0%	0.9%	0.9%	0.7%	0.7%	0.7%	0.8%	1.3%	1,3%
Switzerland	0.6%	0.6%	0.8%	0.9%	1.0%	1.0%	0.9%	0.9%	1.0%	1.2%	1.5%	1.7%	1,7%
UK	2.6%	2.9%	2.6%	2.8%	3.8%	3.8%	3.8%	4.0%	4.2%	4.3%	4.5%	4.8%	4,1%
Weighted average	1.0%	1.0%	1.1%	1.2%	1.5%	1.5%	1.4%	1.5%	1.6%	1.7%	1.8%	2.0%	1,7%

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

The European average agency work penetration rate was 1.7% in 2008

The European average agency work penetration rate fell from 2% in 2007 to 1.7% in 2008, notably due to the early impact of the economic crisis on the UK, by far the largest market in Europe. Nevertheless, this average hides enormous differences from country to country, ranging from 4.1% in the UK to 0.2% 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.



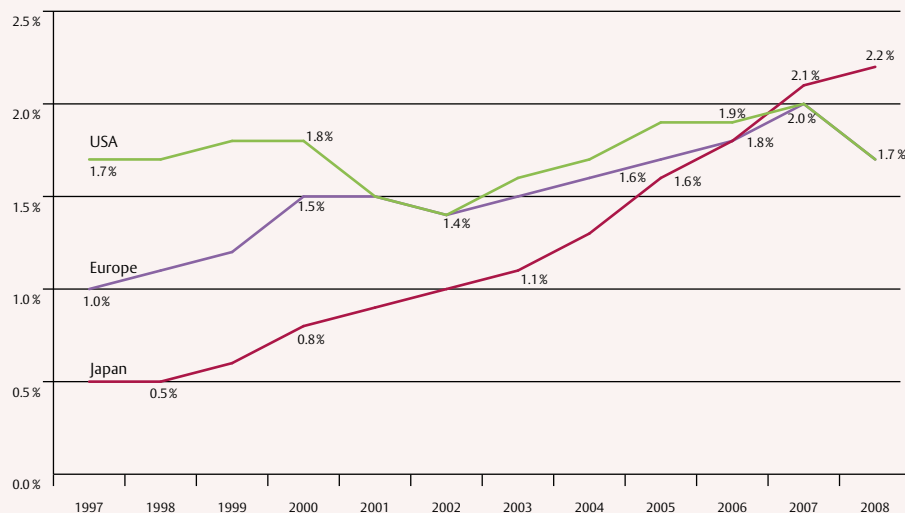
* Defined as the number of full-time equivalents - as supplied by Ciett National Federations - divided by the total active working population - as published by the ILO

The Japanese penetration rate reached 2.2% in 2008

AGENCY WORKERS
IN NUMBERS

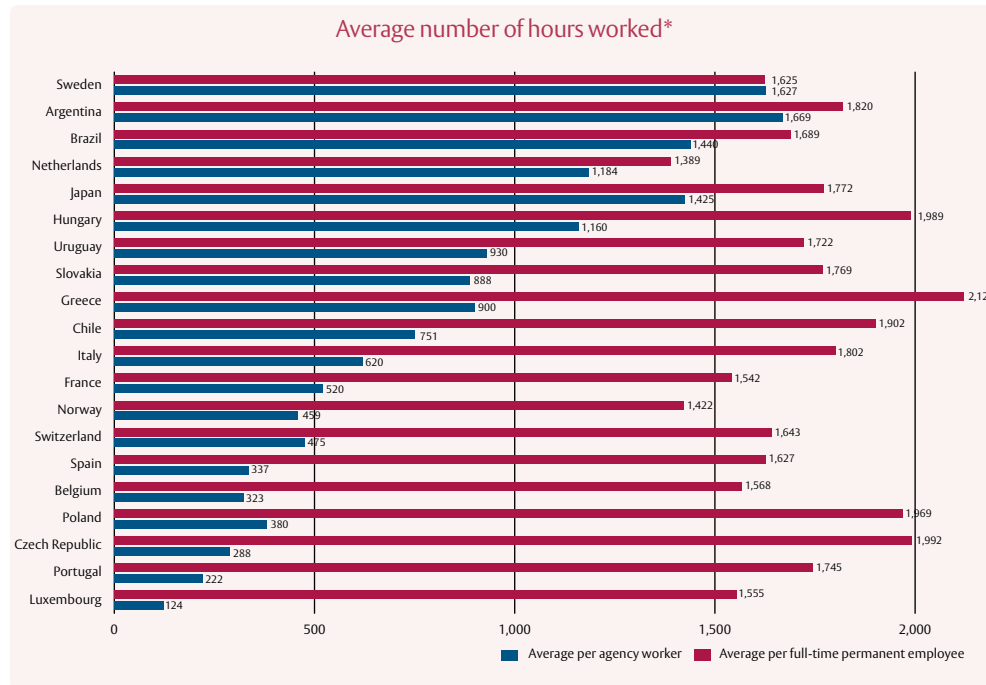
Due to the progressive recognition of the positive role played by agency work in the European and Japanese labour markets, their respective agency work penetration rates grew steadily over the last ten years, catching up and even overtaking the American figure in 2007. In 2008, the European and American penetration rates fell to 1.7%, reflecting the early impact of the economic crisis on these markets, whilst the Japanese penetration rate continued to grow, to reach 2.2%.

Comparison of European, Japanese and American agency work penetration rates



Agency workers work nearly half as much 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 a tenth in Luxembourg to equivalent in Sweden.

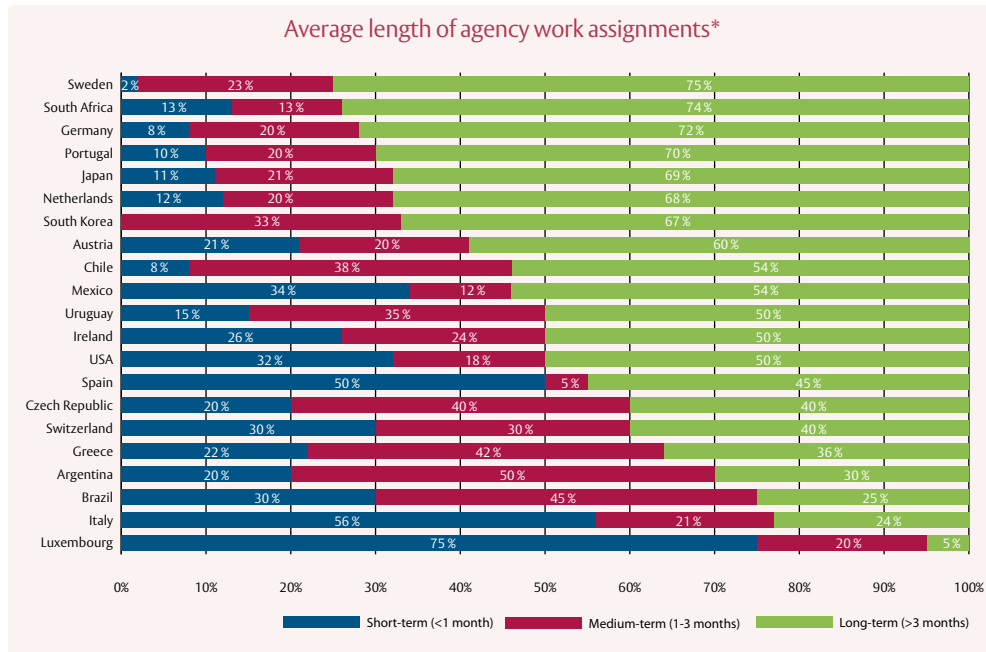


* By an individual during one year
Sources : Ciett National Federations, ILO 2009

Most agency work assignments are more than one month long

AGENCY WORKERS
IN NUMBERS

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 [56%] and Luxembourg [75%], 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 2% 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.

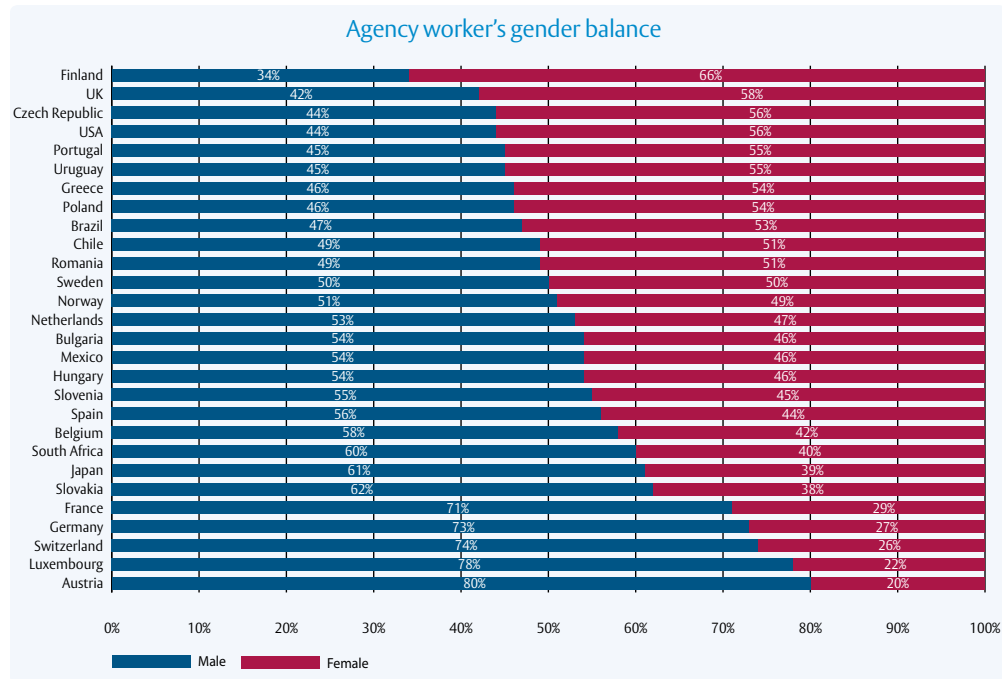
3. The profile of agency workers

- Differences in gender balance depend on the socio-economic fabric of a country.
- More than three in five agency workers are aged less than 30.
- 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 by the sectors allowed to use agency work. More services-oriented markets tend to employ more women, such as Portugal [55% of women and 40% in the services sector], whereas markets with a strong industrial fibre usually employ more men, such as South Africa [60% of men and 60% in the manufacturing sector].

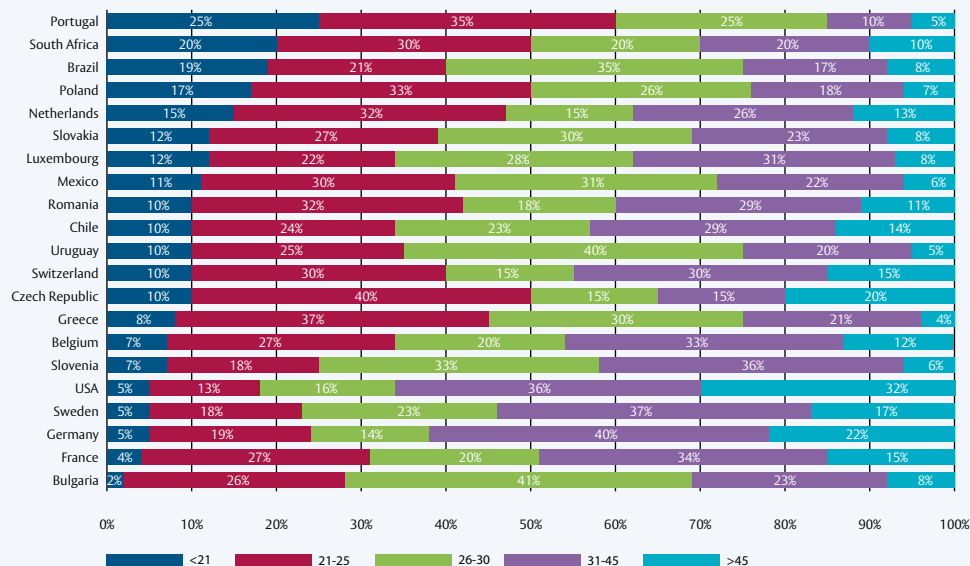


Most agency workers are aged below 30

PROFILE OF AGENCY WORKERS

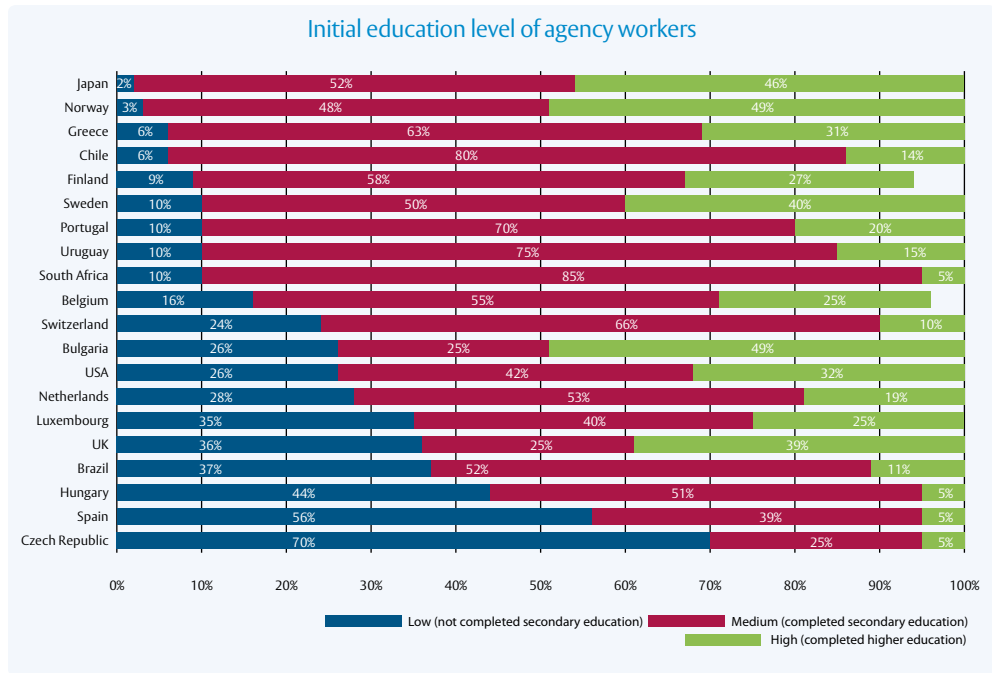
Over-represented in the agency work sector, when compared to the total active working population, most agency workers are aged below 30. Agency work often serves as a first professional experience for first-time entrants into the labour market, providing them with a valuable initial experience or serving as a stepping-stone to permanent employment. The three notable exceptions to this trend are the USA [68% over 30], Germany [62% over 30], and Sweden [54% 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 24% 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.

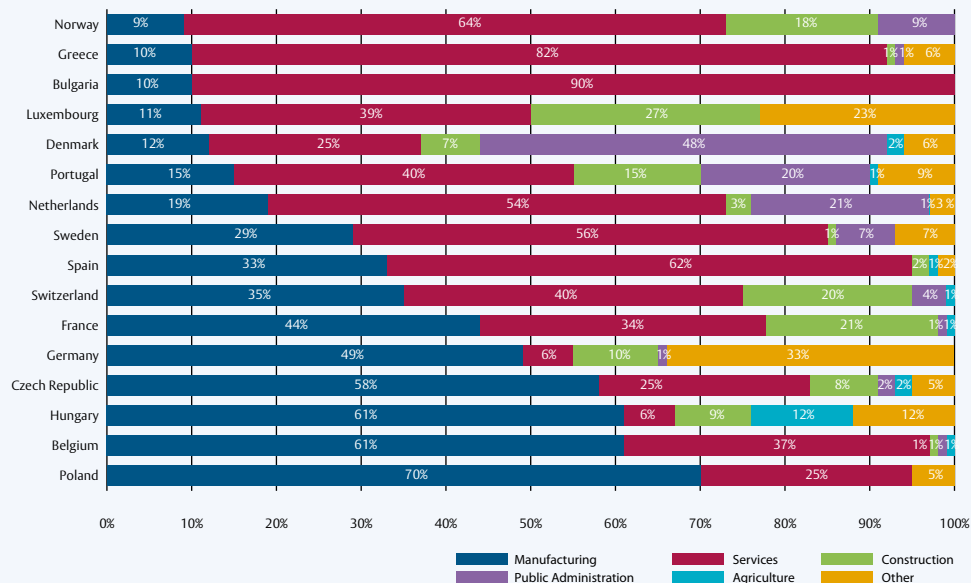


Sectoral distribution of agency work in Europe

PROFILE OF AGENCY WORKERS

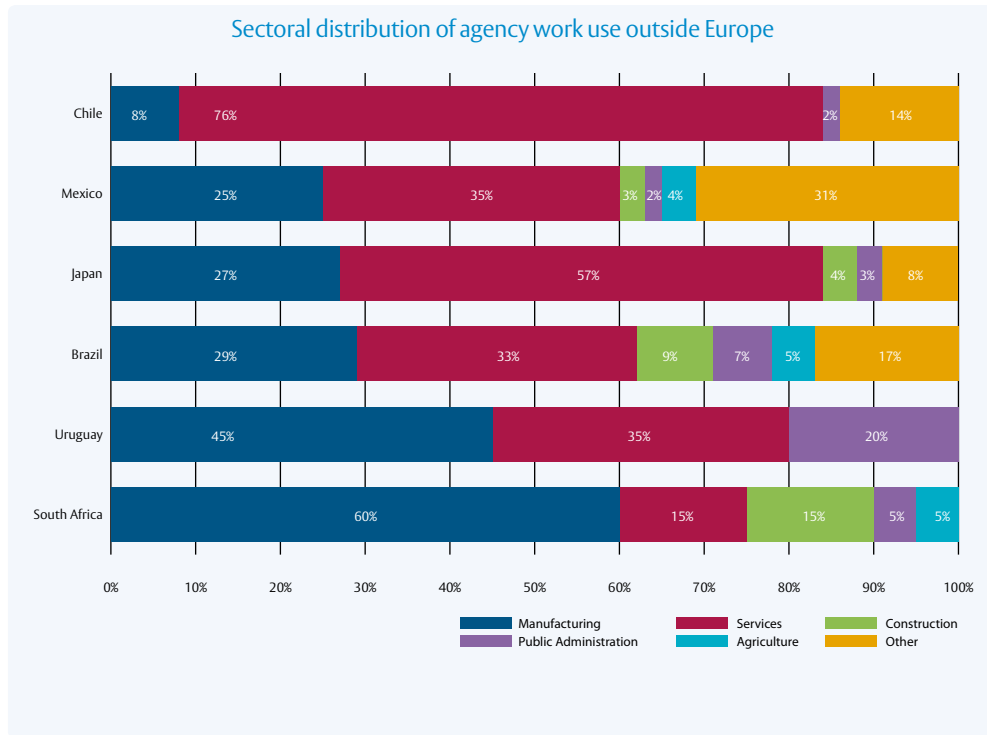
Reflecting the ongoing mutations of the European economies, the sectoral distribution of agency work in Europe has seen a recent trend away from usage in the industrial sector [33% average], towards a growing use in the services sector [43% average], towards a growing use in the services sector [43% average]. Manufacturing remains an important user of agency work in traditionally industrial economies, such as Poland [70%] and Belgium [61%]. Denmark [48%] and the Netherlands [21%] make important use of agency work in healthcare and public administration, as do France [21%] and Norway [18%] 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



Sectoral distribution outside Europe

Uruguay [20%] makes important use of agency work in the public sector. Construction is an important user of agency work in South Africa [15%]. More than three in four Chilean agency workers work in the services sector, and more than three in five South African agency workers work in the manufacturing sector.

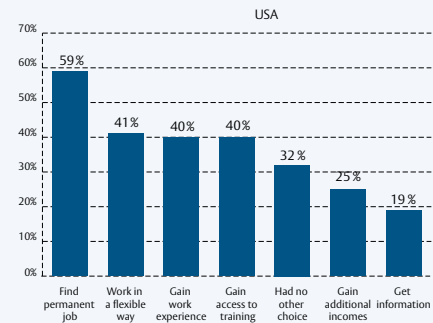
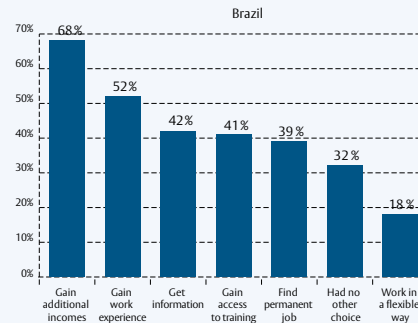
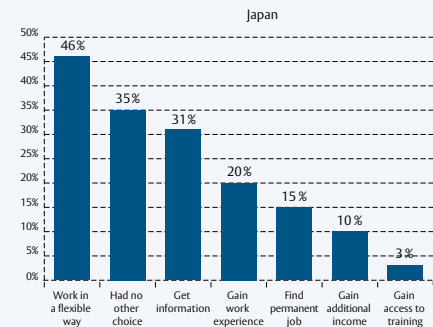
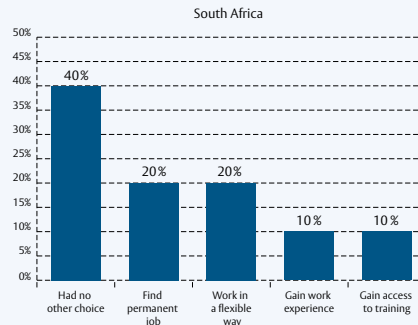


b. Agency workers' motives and satisfaction

Outside Europe the main motive to work via an agency is often to find a permanent position

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 work experience and subsequent improved employability [52% in Brazil], or to obtain information on the labour market [31% in Japan]. Gaining access to training is an important reason to work as an agency worker in Brazil [48%] 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 [46%] and the USA [41%], two countries with a firmly established agency work industry.

Reasons to work as an agency worker outside Europe

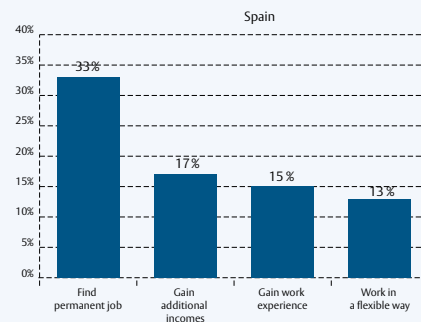
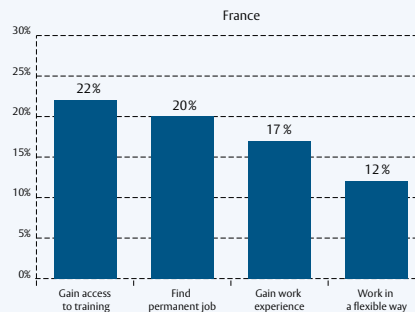
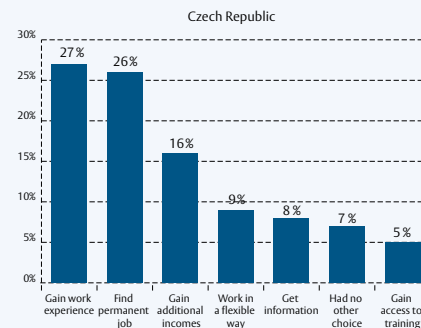


In Europe the main motive to work via an agency is also to find a permanent job

PROFILE OF AGENCY WORKERS

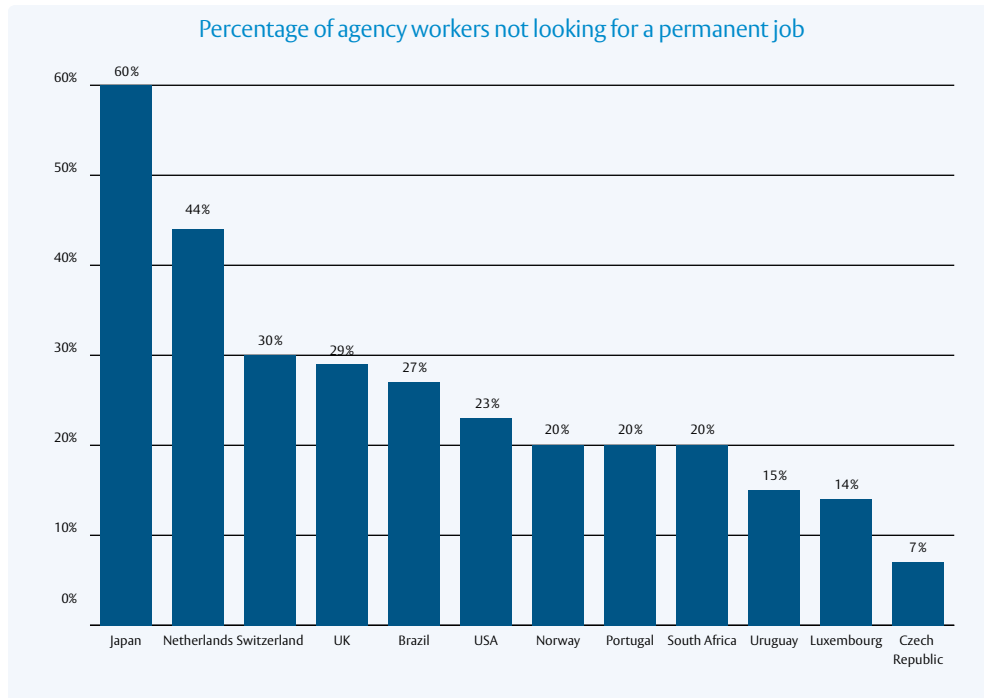
In most European countries the main motive is - as outside Europe - to find a permanent position [33% in Spain] or to gain work experience [27% in the Czech Republic]. Other non-work or career-related motives exist to engage in agency work, often to obtain additional incomes [17% in Spain], but also to achieve a better work-life balance by working in a flexible way [12% in France]. France is the only country where access to training is seen as the most important reason to work as an agency worker, a finding that can be explained by the elaborate vocational training system that is firmly established in the French agency work industry [the French bi-partite training fund for agency workers was founded in 1983].

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 [60%], the Netherlands [44%] and Switzerland [30%]. 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.

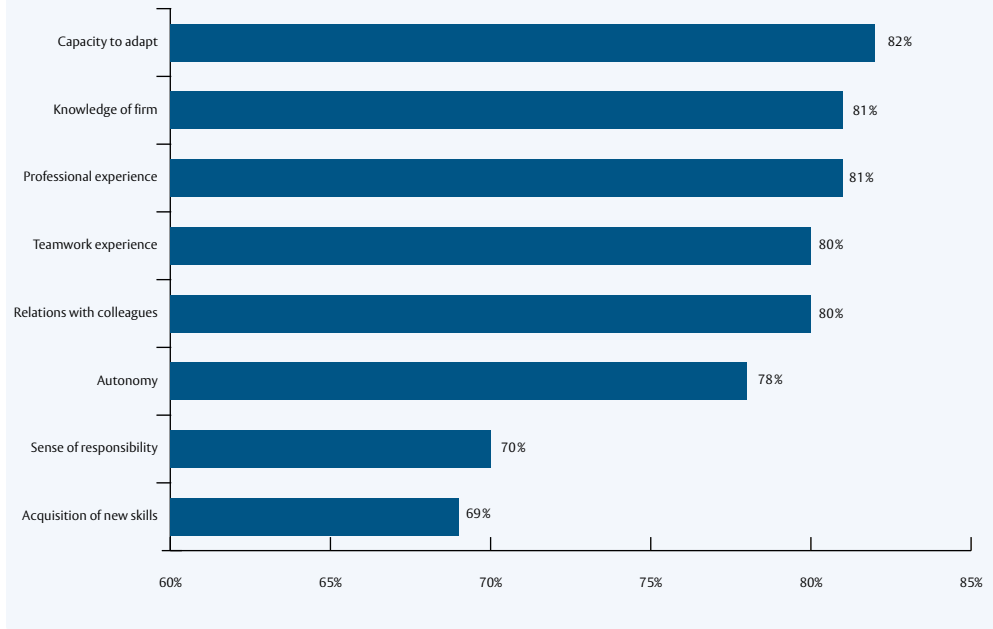


In France agency work is seen as enhancing employability

PROFILE OF AGENCY WORKERS

In France, the most cited benefit of working as an agency worker is the “capacity to adapt” [82%]. Most French agency workers are convinced that agency work allows them to acquire new skills [69%] and the professional experience [81%] they need to improve their employability, thereby ultimately providing them with more work opportunities.

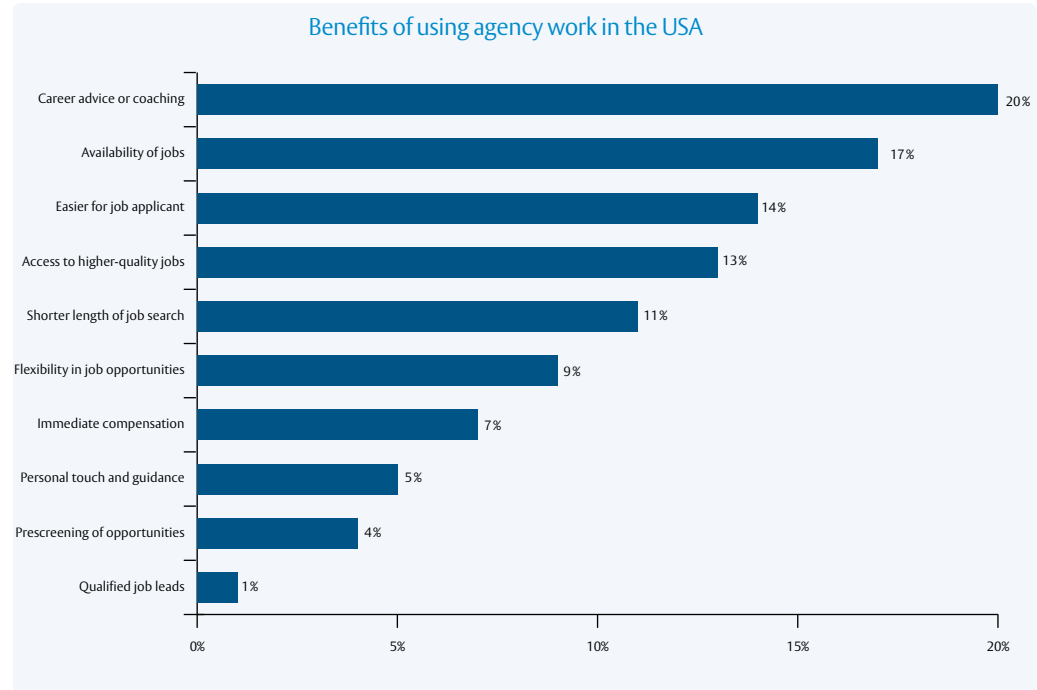
Benefits of working as an agency worker in France



Source : OTT / BVA 2008

In the USA agency work is seen 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%].



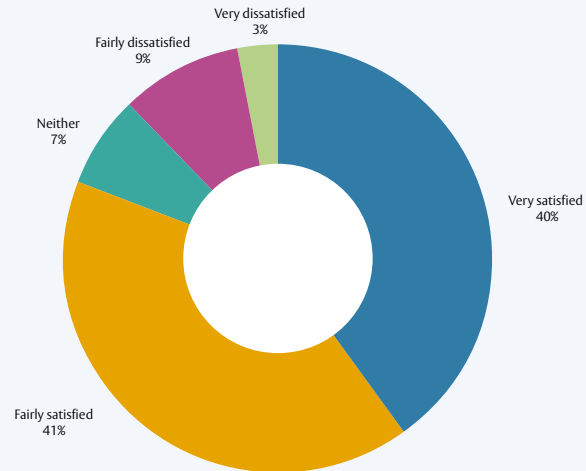
Source: American Staffing Association 2008

Most agency workers in the UK are satisfied with their job

PROFILE OF AGENCY
WORKERS

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.

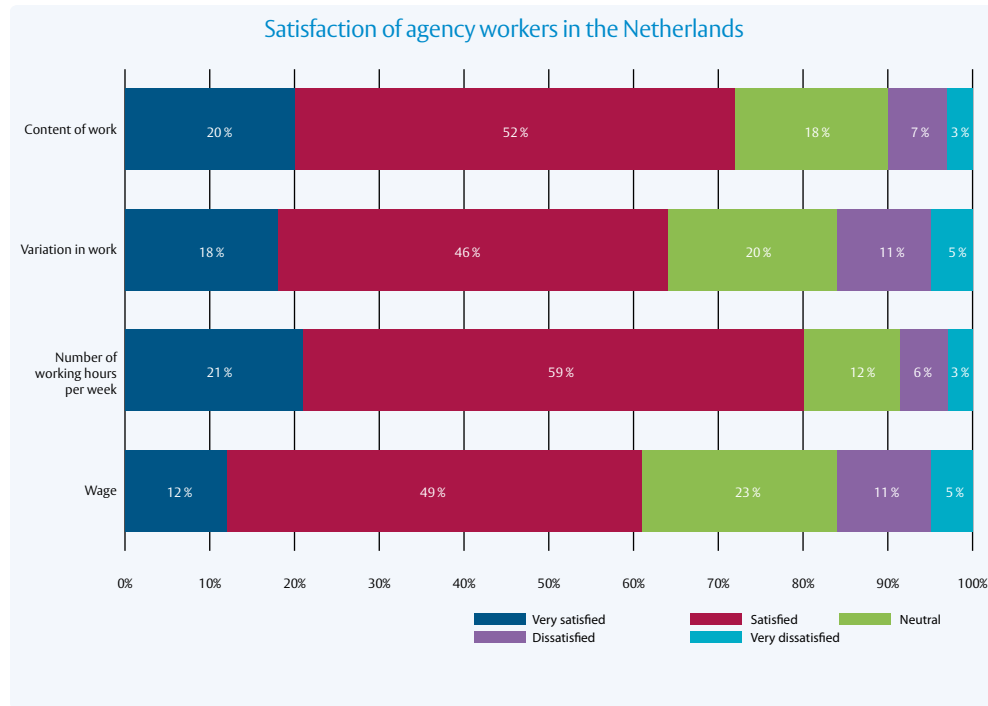
Satisfaction of agency workers in the UK



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

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

- Agency work facilitates transitions in the labour market.
- Between 2003 and 2006 the private employment agency industry created 669,000 net additional jobs in Europe.
- 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. General Trends

Agency work facilitates transitions in the labour market

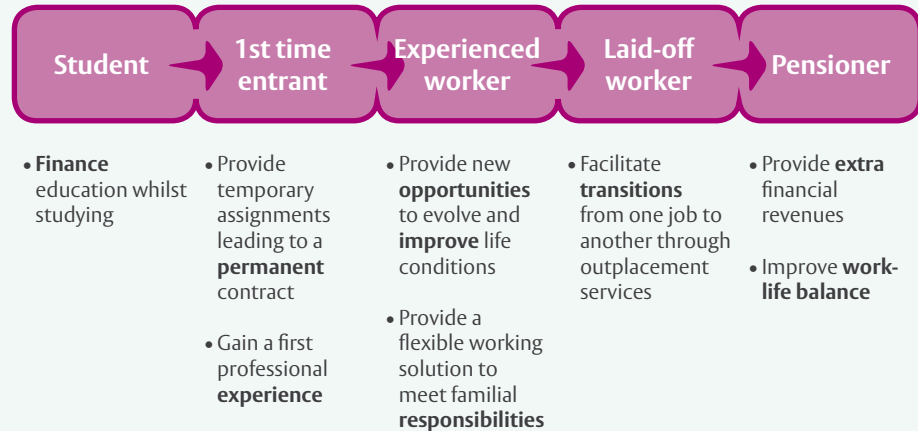
AGENCY WORK'S CONTRIBUTION TO A BETTER
FUNCTIONING LABOUR MARKET

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. Intrinsically 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.”

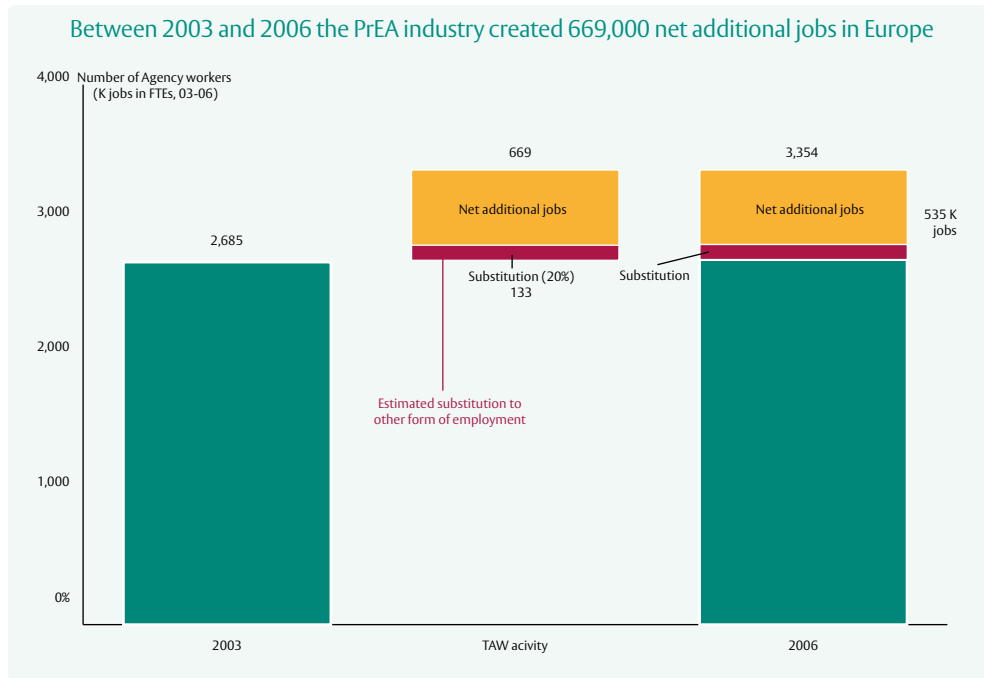
Source: Eurofound - Temporary Agency Work and Collective Bargaining in the EU | 2009

Transitions in the labour market



Between 2003 and 2006 the PrEA industry created 669,000 net additional jobs in Europe

The PrEA industry contributes to creating jobs that would not otherwise exist. Between 2003 and 2006, it created 669,000 net additional jobs in Europe, accounting for 7.5% of total job creation during that period. Without the services provided by PrEAs, 80% of these jobs would not have been created.



Additional jobs are jobs that would not otherwise have existed, i.e. after having taken into account the potential substitution effect [20%]

Note: Estimate for the Netherlands, Adecco estimate for Germany; Data for Belgium not available

Sources: Ciett National Federations, Adecco 2008

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.

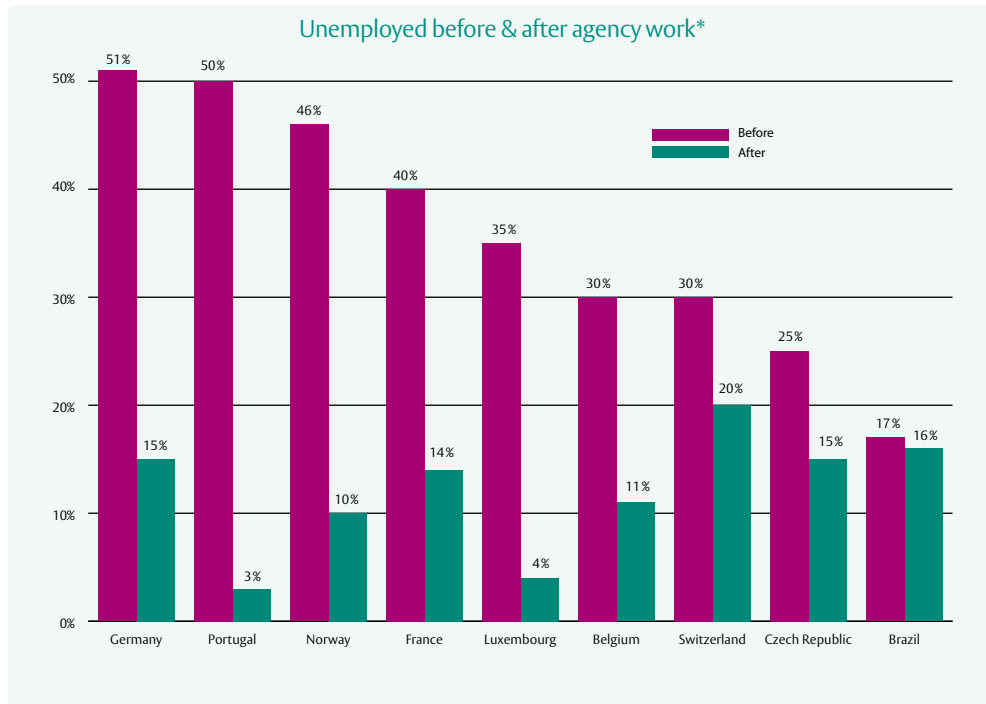
Agency work penetration rates and unemployment rates



Source : Ciett National Federations, IMF 2009

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

Many agency workers are officially registered as “unemployed” before working with an agency [36% average]. This proportion falls threefold after working as an agency worker [12% 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.

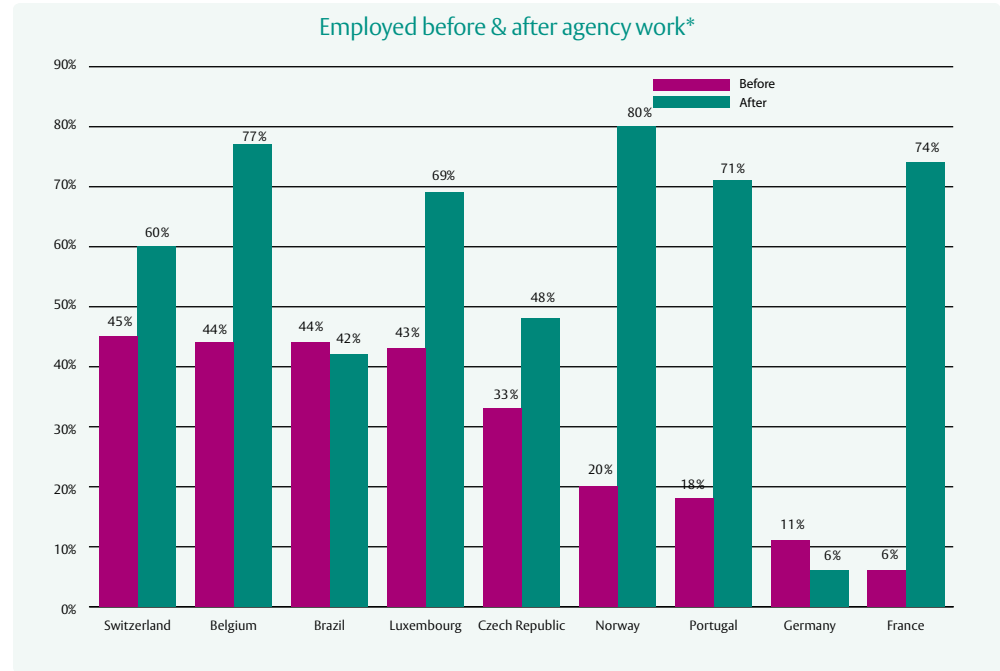


*% of agency workers officially registered as unemployed before and 12 months after temping

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

AGENCY WORK'S CONTRIBUTION TO A BETTER
FUNCTIONING LABOUR MARKET

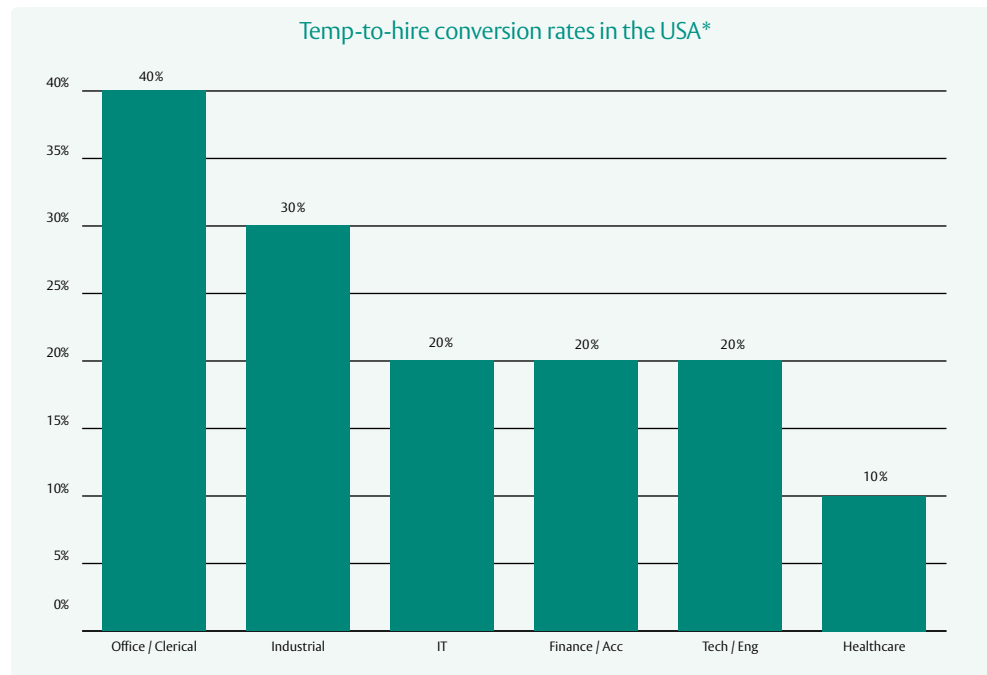
On average, the proportion of those in employment before [29%] and after [59%] having worked as an agency worker is more than doubled. This supports the argument that agency work serves as a stepping-stone, especially for first-time entrants to the labour market, enhancing worker employability, by proposing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



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

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%.



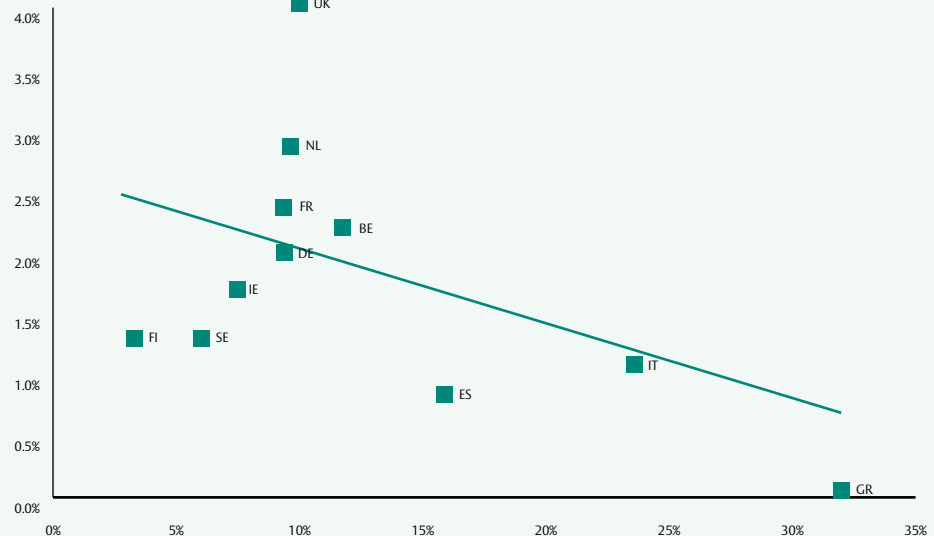
*% of agency workers in the USA that get an open-ended contract after temping
Source: Staffing Industry Analysts 2008 - www.staffingindustry.com

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.

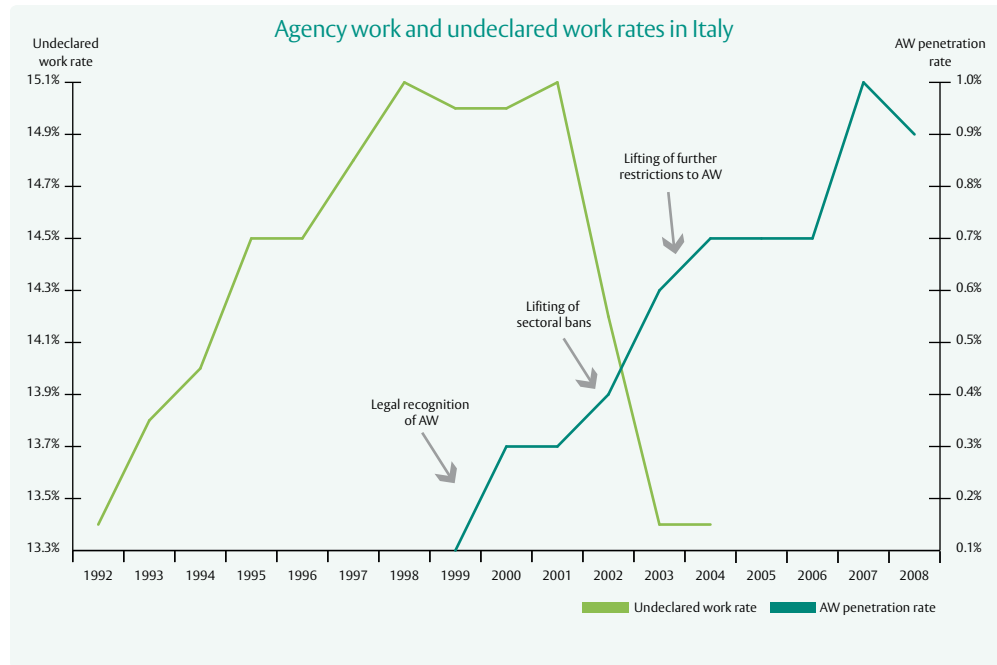
Agency work penetration rates and undeclared work as a percentage of GDP



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: Assolavoro, EuroStat, Istituto Nazionale di Statistica, LitSearch

Agency work facilitates transitions through skills upgrading

AGENCY WORK'S CONTRIBUTION TO A BETTER FUNCTIONING LABOUR MARKET

In several 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% ¹	0,50% ²	1,02%	1,25%	

1 - Maximum contribution rate

2 - Minimum contribution rate as determined by collective labour agreement

Source : IDEA Consult 2008

b. Inclusion of vulnerable groups

The number of agency workers over 50 is increasing in Italy

AGENCY WORK'S CONTRIBUTION TO A BETTER
FUNCTIONING LABOUR MARKET

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%.

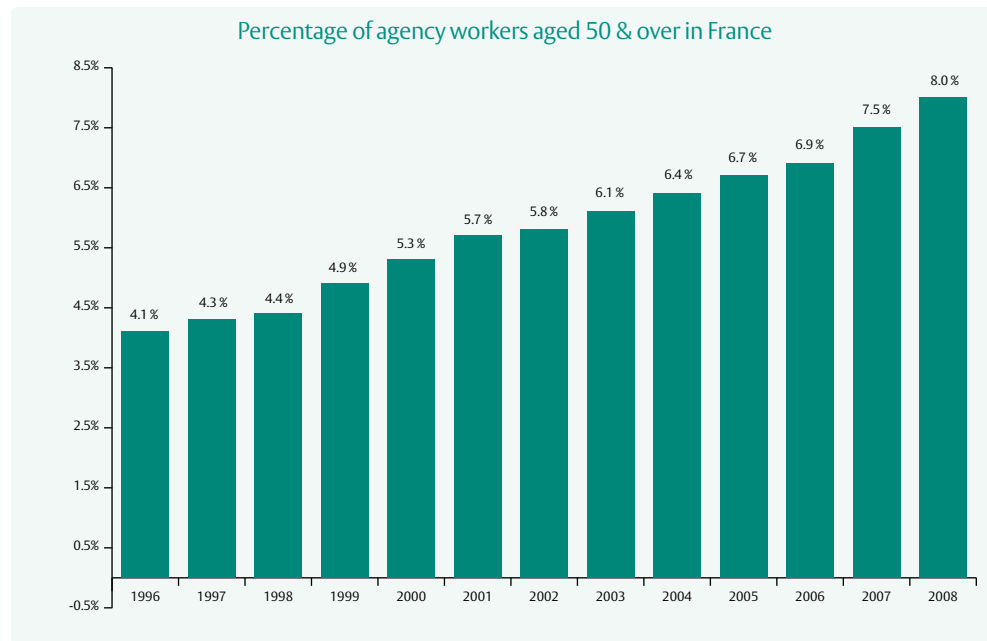
Age distribution of agency workers in Italy in 2004, 2006 & 2008



Source : Ebitemp 2009

In France the proportion of agency workers over 50 is increasing

In France, the number of agency workers aged over 50 increases every year, and has nearly doubled between 1996 [4.1%] and 2008 [8.0%]. 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.



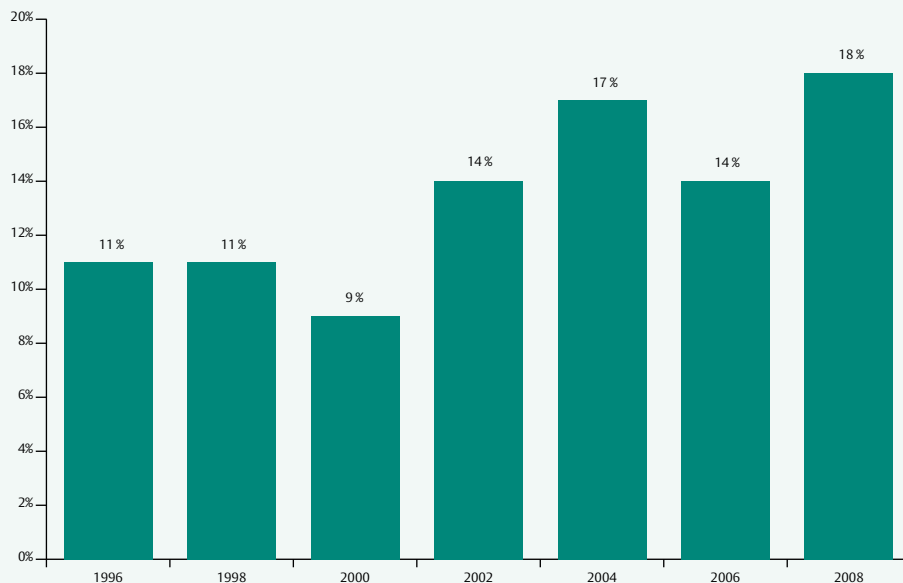
Source : Dares 2009

The proportion of agency workers of ethnic background in the Netherlands is increasing

AGENCY WORK'S CONTRIBUTION TO A BETTER
FUNCTIONING LABOUR MARKET

Agency work gives “outsiders”, including those of ethnic background, a viable access to the labour market, thereby increasing labour market participation and diversity. 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.

Percentage agency workers of ethnic background in the Netherlands

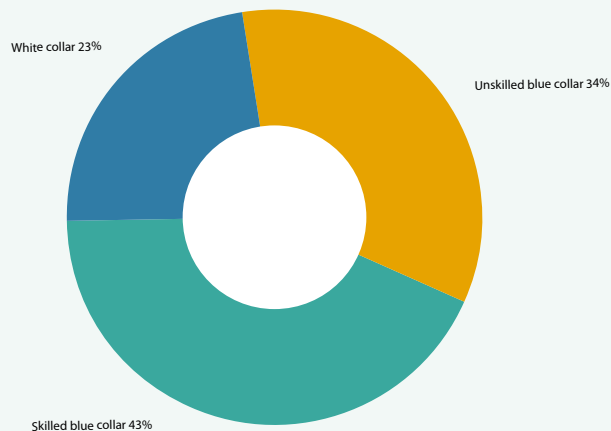


Source : ABU / Ecorys 2009

French disabled agency workers are usually blue-collar men in their forties

A recent French study surveyed 300 disabled workers having been assigned by an agency in the last 3 years. In line with the general use of agency work in France, three quarters of disabled agency workers work as blue-collar. However, French disabled agency workers tend to be a lot older than agency workers in general, with 64% of them aged 40 or more. Two thirds of French disabled agency workers are men, compared to 71% of the agency worker population in general, and 56% work in the manufacturing segment, compared to 44% in the agency worker population at large.

Employment of disabled agency workers in France



Source : OTT 2008

5. Companies' rationale to use agency work

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

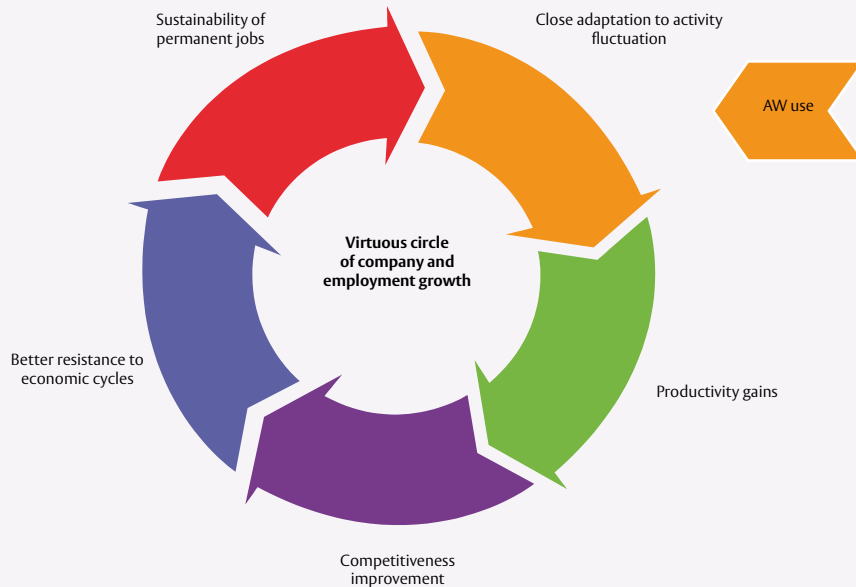
Agency work improves companies' competitiveness

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

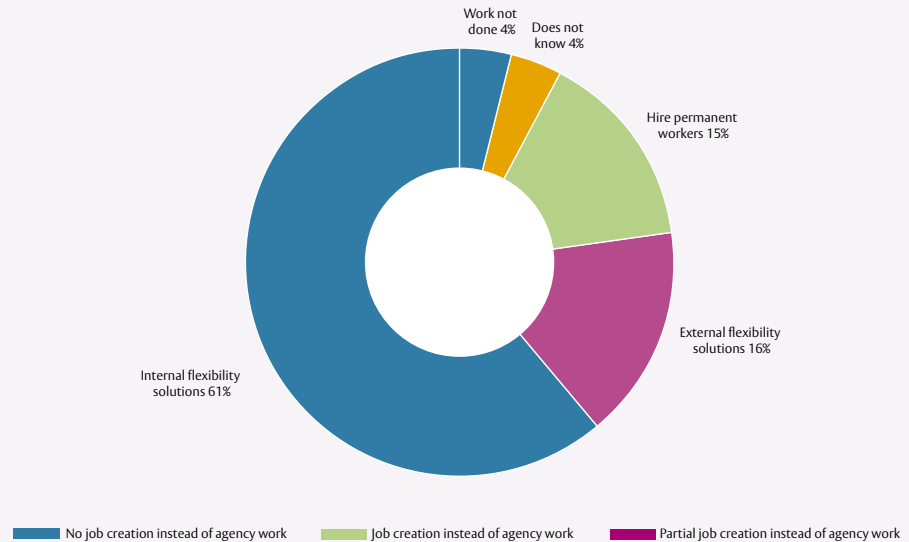


Agency work is not a substitute for permanent employment

COMPANIES' RATIONALE TO USE AGENCY WORK

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.

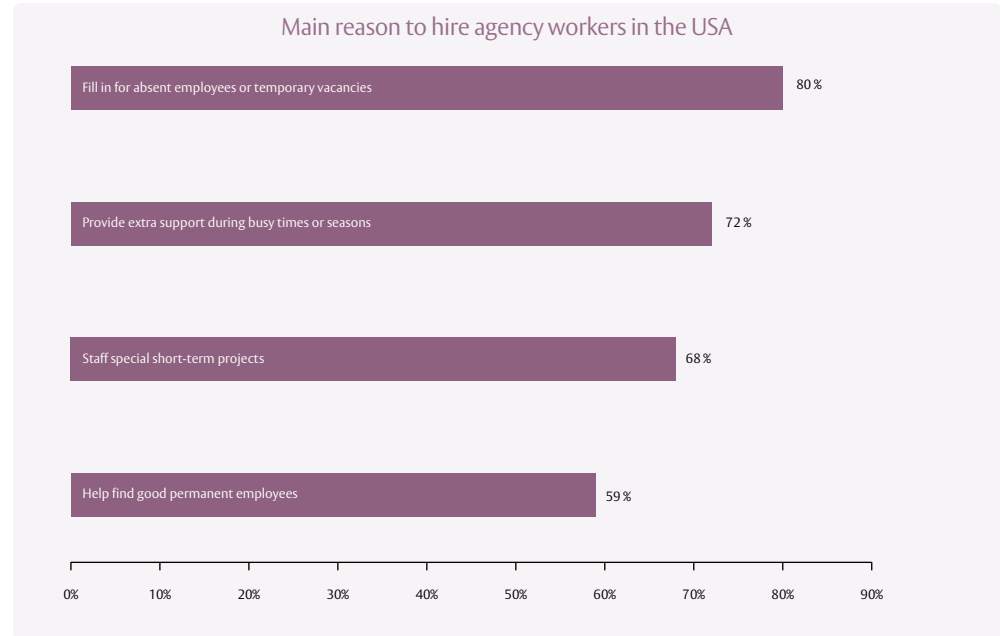
Job creation in the UK: What is the alternative to the use of agency work?



Source: Continental Research Corporate 2005

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

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.

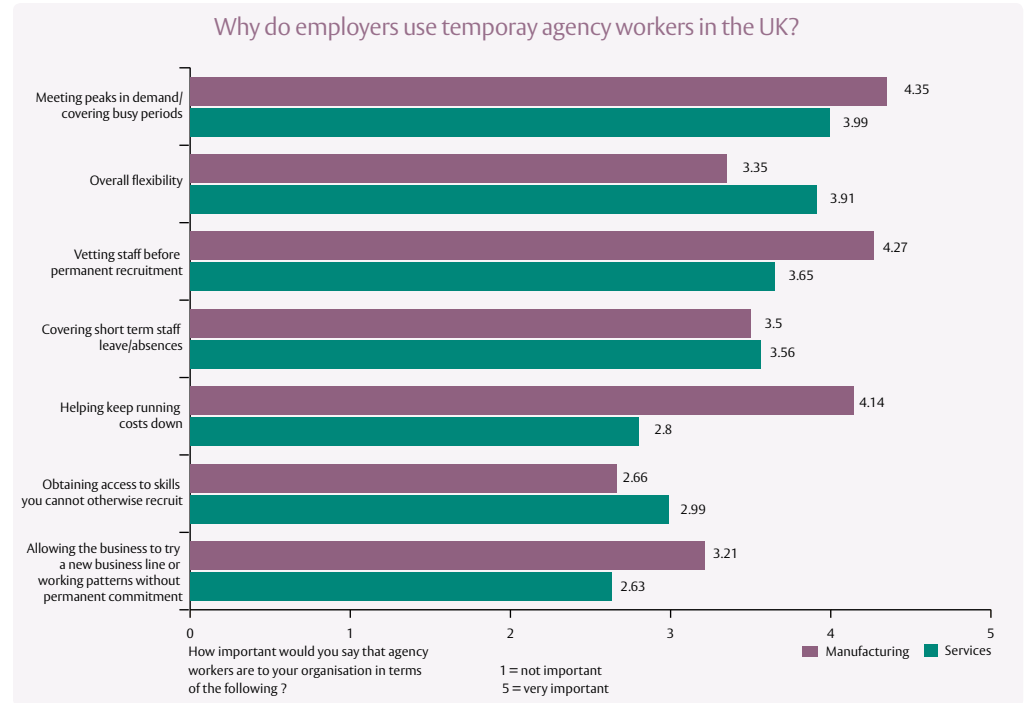


Source: American Staffing Association 2009

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

COMPANIES' RATIONALE TO USE AGENCY WORK

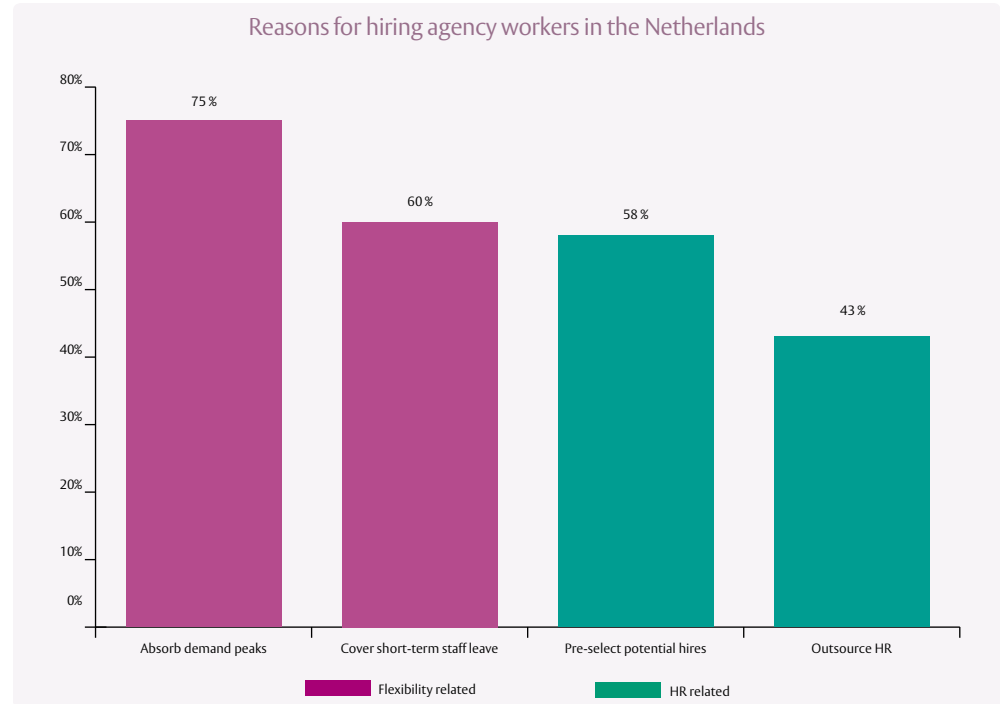
Three in five employers say that they use agency workers to fill a temporary position “always” or “most of the time”. The other most frequently used methods to cover for temporary vacancies are resorting to casual staff, followed by fixed term contract workers and increased over-time. The overall flexibility 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

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.



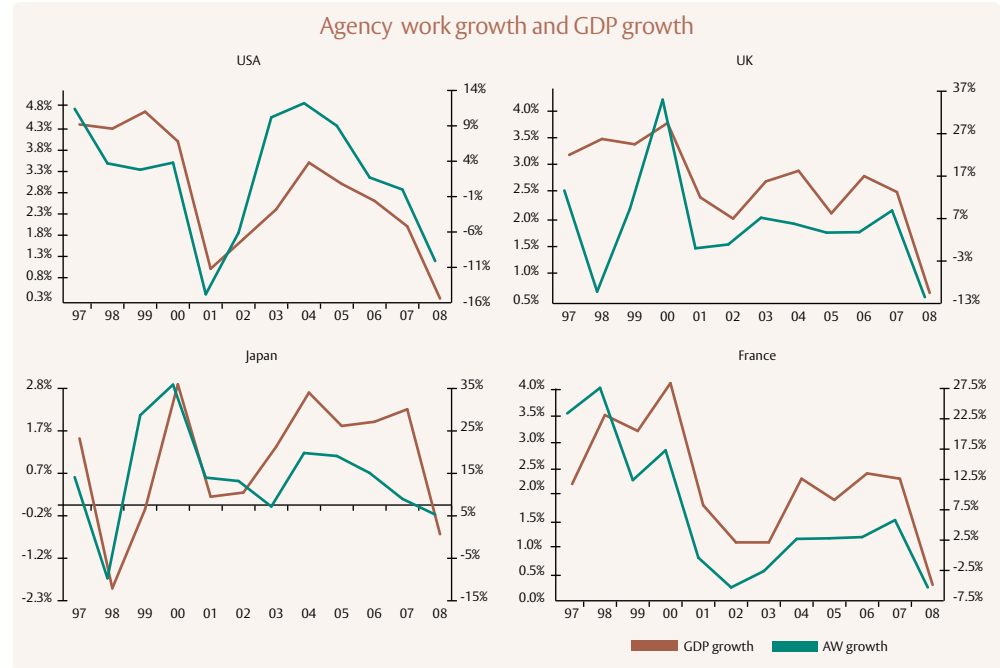
Source: ABU 2005

6. Impact of the Economic Crisis

- 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 will be the first ones to be hired when the economy recovers.
- Agency work limits the risk and duration of unemployment.
- The private employment agency industry typically rebounds sharply after recessions.

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.



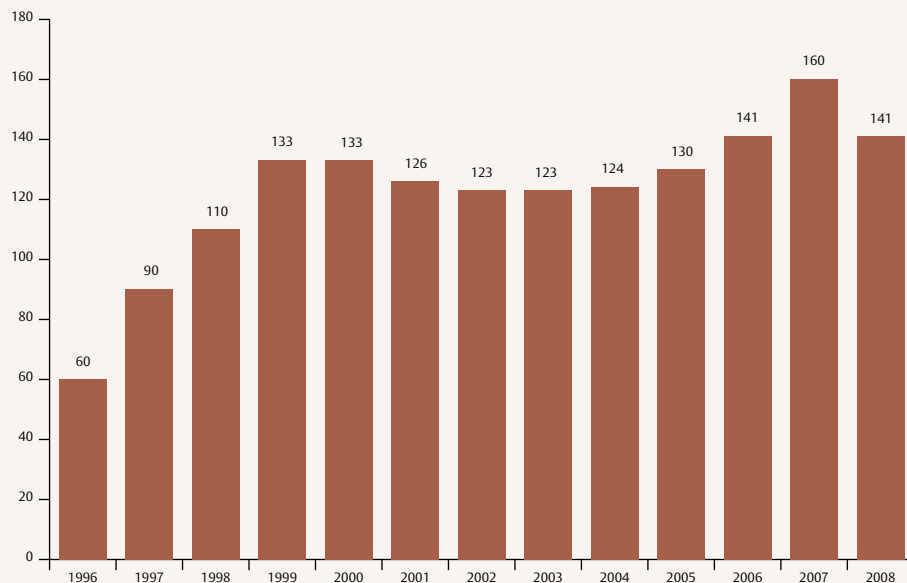
Sources : Ciett National Federations, IMF 2009

Number of agency workers in Spain

IMPACT OF THE ECONOMIC CRISIS

In 2008, 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 increased by 47 % between January 2008 and January 2009 to reach 11.3%. The number of agency workers fell by 12%, from 160,000 in 2007 to 141,000 in 2008. The penetration rate of agency work now stands at 0.7%, down from 0.8% in 2007.

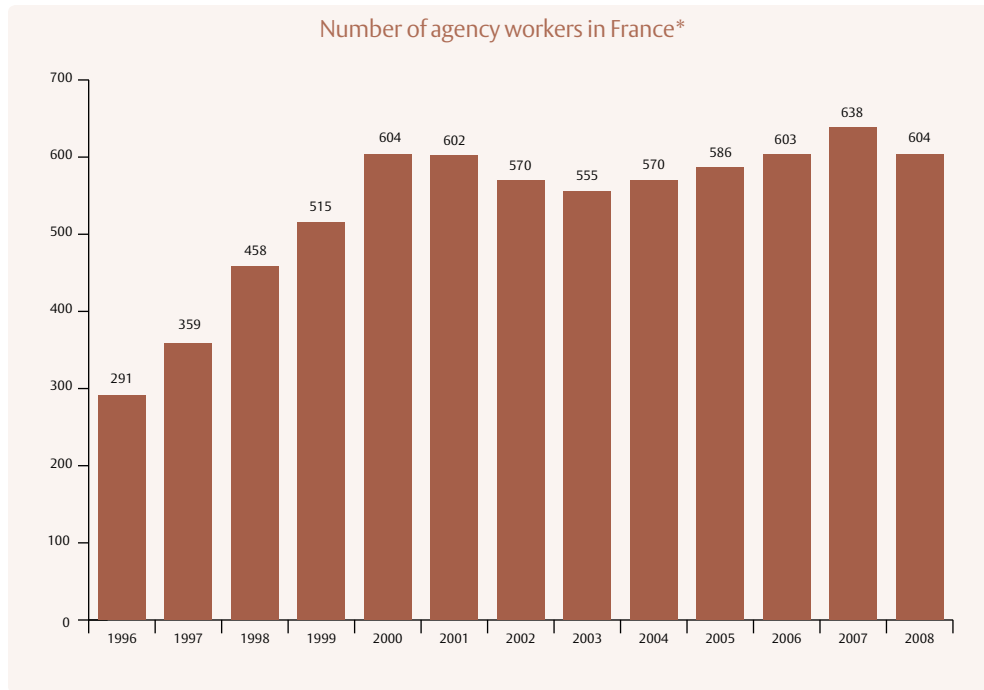
Number of agency workers in Spain*



* in FTEs / 1,000

Number of agency workers in France

France experienced a sharp increase in unemployment in 2008, although the increase was less steep than in a number of other developed economies, notably due to the use of short-time working schemes. Since the end of 2007, more than 600,000 individuals have swelled the ranks of the unemployed. The number of agency workers in France fell by 5%, from 638,000 in 2007 to 604,000 in 2008. The agency work penetration rate is now 2.3%, the same level as in 2003 and 1999.

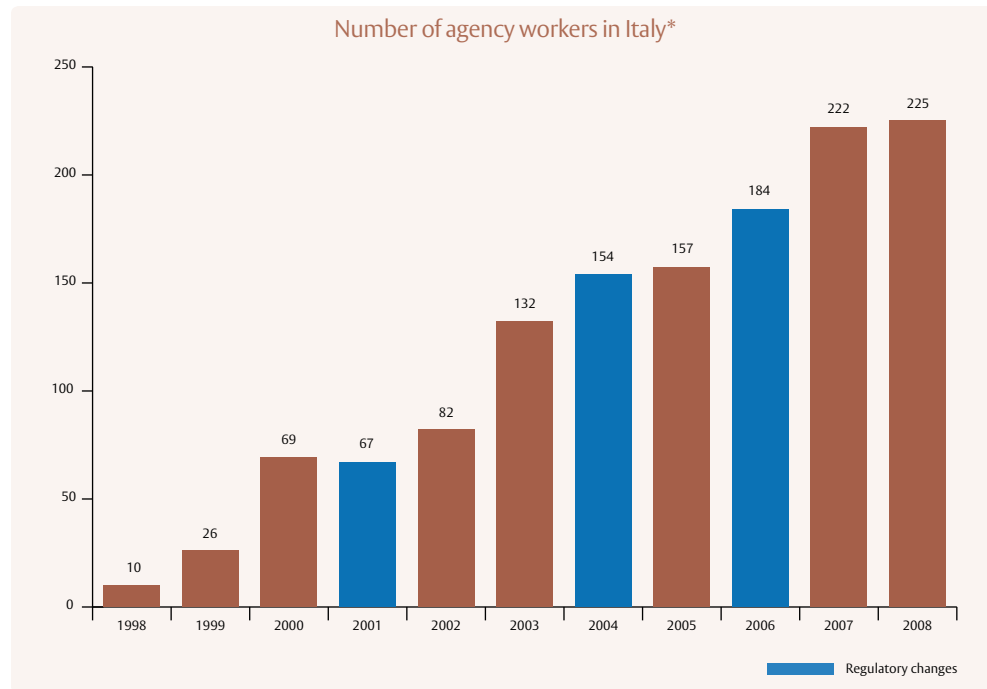


* in FTEs / 1,000

Number of agency workers in Italy

IMPACT OF THE ECONOMIC CRISIS

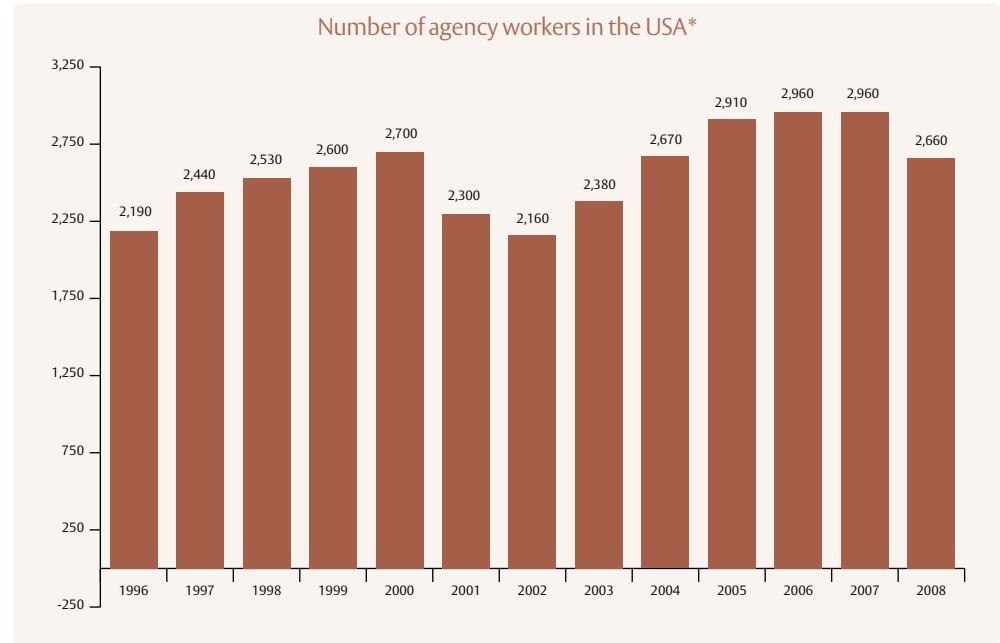
The impact of the crisis on the Italian labour market was relatively mild in 2008. The Italian agency work market was also hit later than other European countries. This is partially due to regulatory changes introduced in 2001, 2004 and 2006 that helped liberalise the market, thereby cushioning the impact of the crisis on the industry.



* in FTEs / 1,000

Number of agency workers in the USA

The American agency work market was naturally the first hit by the global economic crisis, the initial financial crisis having been caused by the subprime debacle in the USA. The number of agency workers fell by 10%, from 2.96 million in 2007 to 2.66 million in 2008, after having remained flat all through 2007 [compared to 2006]. The penetration rate of agency work now stands at 1.7%, the same level it had in 2004 and 1998.

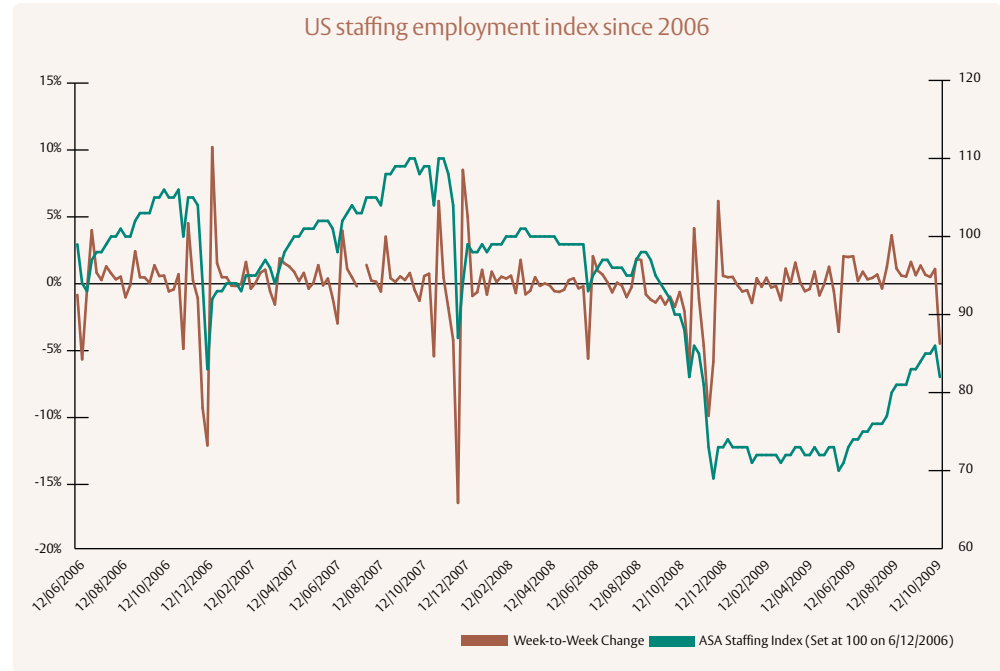


* in FTEs / 1,000

The American agency work market was hit by the crisis later than in previous recessions

IMPACT OF THE ECONOMIC CRISIS

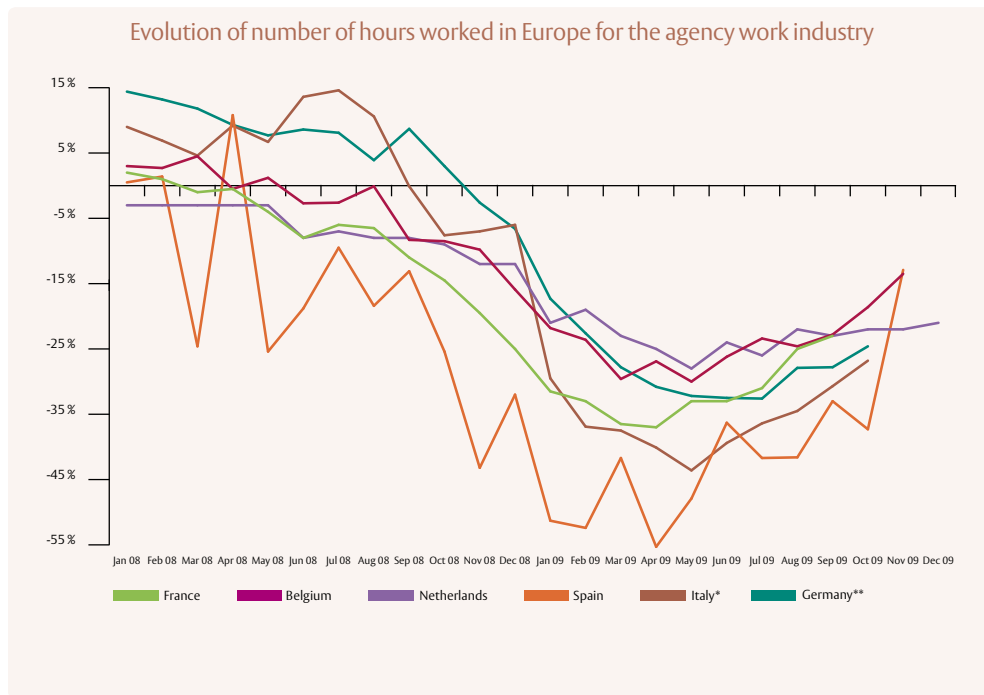
American economic activity measured by employment peaked in December 2007. Since then, it has lost jobs every month. Contrary to 2001, when the agency work industry contracted well before the beginning of the recession, this time it contracted well after. But even though the decline in agency work occurred later, it rapidly outpaced that of the American workforce at large, as it played its role of buffer, cushioning the impact on permanent staff.



Source: American Staffing Association 2009

The European agency work market was hit by the crisis as of the beginning of 2008

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, the financial crisis affected the UK hardest, as the construction sector's collapse in Spain had an enormous impact on its labour market. The introduction of short-time working schemes in certain countries helped cushion the effect of the crisis on the labour market, and was extended to include temporary agency workers in some cases.



Source: Ciett National Federations 2009

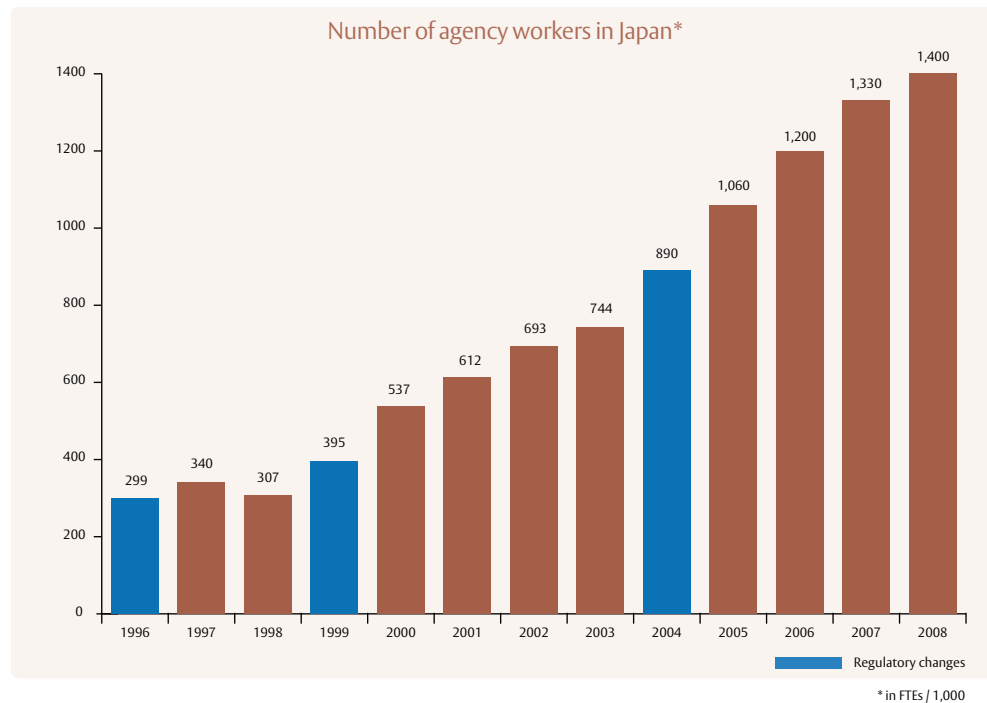
* number of remunerated working days -

** number of FTEs

Number of agency workers in Japan

IMPACT OF THE ECONOMIC CRISIS

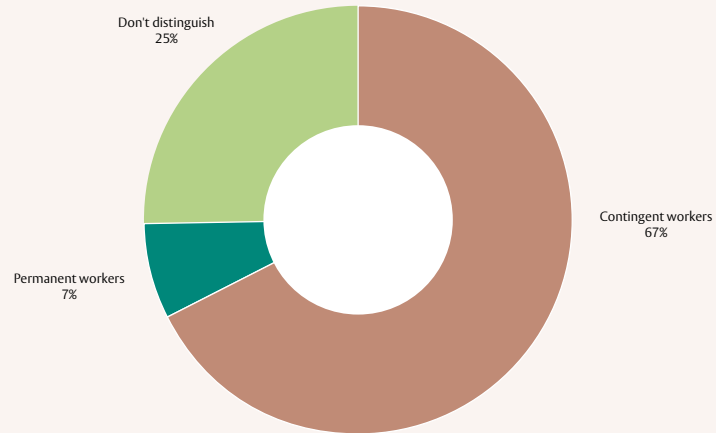
The Japanese agency work market was very tightly regulated till the adoption in 1996, 1999 and 2004 of regulation to liberalise it. These recent regulatory changes helped soften the impact of the economic crisis on the Japanese agency work market, which, as a result, continued to grow in 2008, to reach 2.2% of the total active working population, twice the penetration rate it had in 2003. This shows that, despite the economic crisis, the agency work industry can keep on creating additional jobs, if it is properly regulated.



Agency workers are the first laid off when business turns bad

Agency work enhances companies' competitiveness by creating the conditions necessary for their economic sustainability. Using agency work allows organisations to improve their responsiveness to fluctuations in output, to adapt their workforce to changes in a competitive environment, and to focus on their core businesses. The flexible component of a company's workforce thus serves as a buffer in times of crisis, softening the impact on permanent staff.

When business turns bad, which workers do you typically fire/lay off first?



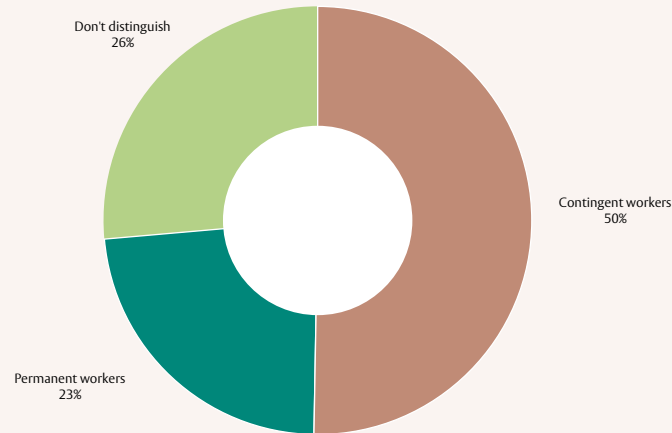
Based on survey of buyers from 171 large [1000+ employee] companies in the USA
Source: Staffing Industry Analysts 2009 - www.staffingindustry.com

Agency workers are the first hired when business recovers

IMPACT OF THE ECONOMIC CRISIS

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 will be 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."

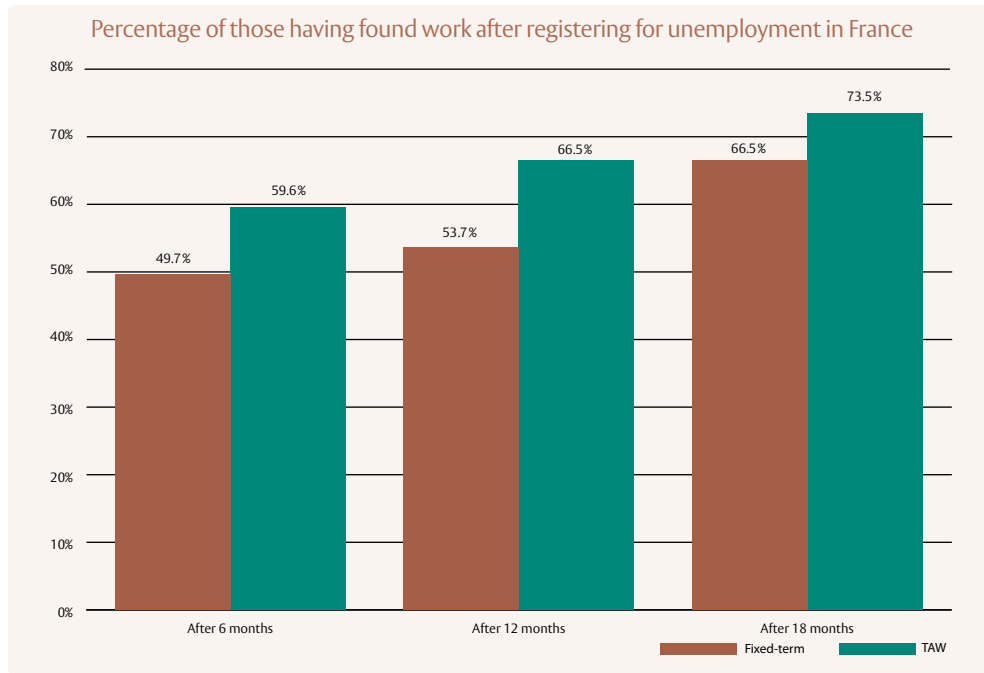
When business recovers, which workers do you typically hire first?



Based on survey of buyers from 171 large [1000+ employee] companies in the USA
Source: Staffing Industry Analysts 2009 - www.staffingindustry.com

Agency work limits the risk and duration of unemployment

Agency work facilitates transitions from unemployment to work, thus helping laid-off workers re-enter the labour market. Serving as the agency worker's impresario, agencies continue to dispatch workers to new jobs once the assignment is finished, as it is in the industry's interest to re-assign these workers, in contrast to other forms of flexible labour [such as fixed-term contracts], which leave the worker unassisted in his search for new employment at the end of a contract.

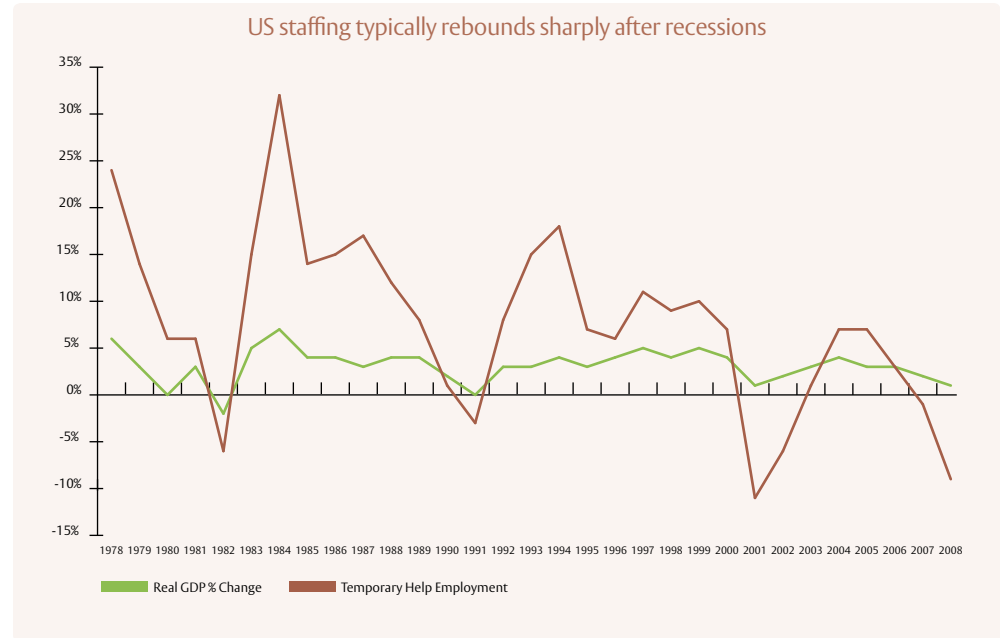


Source: UNEDIC 2008

Agency work typically rebounds sharply after recessions

IMPACT OF THE ECONOMIC CRISIS

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 41 national federations of private employment agencies and seven of the largest staffing companies worldwide: Adecco, Kelly Services, Manpower, Olympia Flexgroup, Randstad, The Hudson Group 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/Pacific, North America, South America [CLETT&A], and Europe [Eurociett].





North America

Canada | ACSESS
Mexico | AMECH
USA | ASA

South America

Argentina | FAETT
Brazil |
SINDEPRESTEM
Chile | AGEST
Colombia | ACOSET
Uruguay | CUDESP

Asia/Pacific

Australia & New
Zealand | RCSA
China | CAFST
Japan | JASSA
South Korea | KOSA

Africa

Morocco | FNETT
South Africa | APSO

Europe

Austria | VZA
Belgium | FEDERGON
Bulgaria | BG Staffing
Czech Republic | APPS
Denmark | Dansk Erhverv
Estonia | ESAA
Finland | HPL
France | PRISME
Germany | BZA
Greece | ENEPASE
Hungary | SZTMSZ
Ireland | NRF
Italy | ASSOLAVORO
Luxembourg | ULEDI

Macedonia | NFTWAM
Netherlands | ABU
Norway | NHO Service
Poland | ZAPT
Portugal | APESPE
Slovakia | APAS
Slovenia | ZAZ
Spain | AGETT & AETT
Sweden |
Bemanningsförtägen
Switzerland | Swiss
Staffing
Turkey | OIBD
UK | REC

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International Confederation of
Private Employment Agencies

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