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**Posting of workers**

**Job advertisements**

Number of temporary workers
Length of the employment of temporary workers
Penetration rate
Temporary workers profile
Value of the temporary work market in Poland
Value of the temporary work market in the world
The agency work market
The agency work market

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

1,1 mln

people are supported by the employment agencies in job seeking in Poland every year.²

776 000

temporary work

160 000

recruitment for foreign employers.¹

189 000

recruitment for Polish employers

According to World Employment Confederation (WEC) number of placements around the world reaches 58 million people.³

¹ Informacja o działalności agencji zatrudnienia w 2018 roku, MRPiPS, 2019
² Informacja o działalności agencji zatrudnienia w 2018 roku, MRPiPS, 2019
The structure of the work agency market

- **8761** number of employment agencies in Poland in 2019
- **5130** temporary work
- **7423** job placement (recruitment), personal counseling, career guidance

Each agency can provide services in both areas.

- **2448** number of new agencies registered in 2019
- **1882** number of agencies removed from the register in 2019

High rotation of entities on the market

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1. kraz.gov.pl
2. kraz.gov.pl
The value of the work agency market

3,99 bn PLN
Total turnover of PFHR members in 2019.

84,9% agency work

3,6% recruitment

5,6% others

5,9% posting of workers

7,25 bn PLN
Estimated value of the work agency market in Poland in 2019.

2,7% DECREASE

473 bn EUR
Global market size according to WEC (in 2018).

1,9% INCREASE

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Ranking of the largest PFHR companies in 2019

TOP 10

Total turnover
1. Randstad
2. Adecco
3. Manpower
4. Trenkwalder
5. OTTO Work Force
6. Contrain
7. Job Impulse
8. Grupa Aterima
9. Gi Group
10. Devire

Agency work
1. Randstad
2. Adecco
3. Manpower
4. Trenkwalder
5. OTTO Work Force
6. Gi Group
7. Job Impulse
8. Devire
9. Grupa Aterima
10. Grafton

Recruitment
1. Michael Page
2. Randstad
3. Adecco
4. Grafton
5. Manpower
6. Devire
7. People
8. Trenkwalder
9. Gi Group
10. Lobo HR

Posting of workers
1. Contrain
2. Grupa Aterima
3. Randstad
4. Fachowcy Firmy Meyer
5. Job Impulse

International recruitment
1. OTTO Work Force
2. Michael Page
3. Adecco
4. Work Force
5. Akcja Job
Agency work
This situation is caused mainly due to the persisting employee market and, consequently, the growing number of temporary employees who find direct employment at an employer user company. The drop would be even bigger, if there wasn’t a growing amount of workers from the third countries. In 2018, 35% temporary workers were third-country nationals, of which 90% were Ukrainians. Over 88% of temporary workers employed by PFHR member companies provide work on the basis of fix-term employment contracts. This percentage for the entire market was only 45%.

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*estimated data

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1 Informacja o działalności agencji zatrudnienia, MRPiPS, 2011–2018
2 Informacja o działalności agencji zatrudnienia w 2018 roku, MRPiPS, 2019
3 Informacja o działalności agencji zatrudnienia w 2018 roku, MRPiPS, 2019

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Number of temporary workers in 2010-2019 (in thousands)

<table>
<thead>
<tr>
<th>Year</th>
<th>Poland</th>
<th>PFHR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>164</td>
<td>433</td>
</tr>
<tr>
<td>2011</td>
<td>199</td>
<td>499</td>
</tr>
<tr>
<td>2012</td>
<td>186</td>
<td>509</td>
</tr>
<tr>
<td>2013</td>
<td>203</td>
<td>559</td>
</tr>
<tr>
<td>2014</td>
<td>254</td>
<td>699</td>
</tr>
<tr>
<td>2015</td>
<td>255</td>
<td>799</td>
</tr>
<tr>
<td>2016</td>
<td>264</td>
<td>796</td>
</tr>
<tr>
<td>2017</td>
<td>256</td>
<td>864</td>
</tr>
<tr>
<td>2018</td>
<td>219</td>
<td>776</td>
</tr>
<tr>
<td>2019</td>
<td>202</td>
<td>713*</td>
</tr>
</tbody>
</table>
Length of the employment of temporary workers

The number of worked hours (as well as their full-time equivalent) decreased 14% year-to-year. The average period of the employment of temporary workers got shorter too, from 60 days in 2018 to 57 days in 2019. Similar data are provided by the Ministry of Labor and Social Policy: in 2018, 51% of temporary employees worked less than three months in total.10

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14% DECREASE

The number of worked hours (as well as their full-time equivalent) decreased 14% year-to-year. The average period of the employment of temporary workers got shorter too, from 60 days in 2018 to 57 days in 2019. Similar data are provided by the Ministry of Labor and Social Policy: in 2018, 51% of temporary employees worked less than three months in total.10

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Source: Informacja o działalności agencji zatrudnienia w 2017 roku, MRPiPS, 2019.
The penetration rate in Poland was about 1.1%. The European average is 2.1%, and the global is 1.6%.

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Temporary workers profile

**AGE**
- 14% > 50
- 49% 26-50
- 37% < 26

**GENDER**
- 47% WOMEN
- 53% MEN

**EMPLOYMENT OF TEMPORARY WORKERS IN SECTORS**
- 30% SERVICES
- 1% CONSTRUCTION
- 69% PRODUCTION
The turnover of the PFHR agency within the temporary work service fell by 6% to PLN 3,382 million.
Value of the temporary work market in the world

Ranking of the 10 largest world markets in terms of turnover rate (bn EUR)

Recruitment
Value of the recruitment services market

Value of recruitment services obtained by members of Polish HR Forum in 2019.

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

- 116.0 mln PLN in 2016
- 128.6 mln PLN in 2017
- 135.9 mln PLN in 2018
- 127.9 mln PLN in 2019

7% DECREASE

145.2 mln PLN

- RECRUITMENT SERVICES FOR POLISH EMPLOYERS
- RECRUITMENT SERVICES FOR FOREIGN EMPLOYERS
Recruitment services for polish employers

Value of recruitment services for Polish employers within PFHR members in 2019.

Most of the services were provided for specialist position and in the service sector.

6% DECREASE
127,9 mln PLN

Value of recruitment services for Polish employers within PFHR members in 2019.

Most of the services were provided for specialist position and in the service sector.

LEVEL OF POSITION
- 60% SPECIALISTS
- 19% EXECUTIVE/ MANAGER
- 18% LINE POSITION
- 3% DIRECTORS

SECTORS
- 57% SERVICES
- 38% PRODUCTION
- 4% CONSTRUCTION
- 1% AGRICULTURE
International recruitment

17,3 mln PLN

Value of recruitment services for foreign employers within PFHR members in 2019.

Most of the workers have been recruited for employers in Netherlands and Germany.¹²

¹² Informacja o działalności agencji zatrudnienia w 2018 roku, MPPS, 2019 r.
Recruitment services in the world

Ranking of the 10 biggest markets (bn EUR)

- USA: 24.1
- Australia: 9.6
- China: 7.6
- Great Britain: 6.2
- Germany: 4.2
- Japan: 3.4
- New Zealand: 1.1
- India: 0.7
- Italy: 0.6
- Switzerland: 0.6

63.4 bn euro

The value of the global recruitment market.\(^{13}\)

Posting of workers
4 Posting of workers

- **70%** SERVICES
- **19%** PRODUCTION
- **9%** CONSTRUCTION
- **2%** AGRICULTURE

**SECTORS**

**235 mln PLN**
Value of posting of workers services within PFHR members in 2019.

**21%** INCREASE

**606 000**
The amount of the A1 certificates issued in Poland in 2018 for the purpose of providing service in the other EU country, according to Art. 12 and in case of the activity in more than one EU country, Art. 13 of the Regulation No. 883/2004. 14

**48,5 000**
The amount of temporary workers posted to foreign employers in 2018. 15

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14 Posting of Workers, Report on A1 Portable Documents issued in 2018, 2019
15 Informacja o działalności agencji zatrudnienia w 2018 roku, MPiPS, 2019 r.
Job advertisements
Job advertisements in 2019

2,3 mln
job advertisements published in 2019

0,3 mln
published by employment agencies

2,0 mln
published directly by employers of which 0,3 mln on the government website oferty.praca.gov.pl

Only 780 employment agencies published job advertisements in 2019, which is surprising in connection with the growing amount of the agencies. PFHR members published over 21% of the total amount of the agencies advertisements.

Job advertisements in sectors

<table>
<thead>
<tr>
<th>Sector</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOGISTICS</td>
<td>17,6%</td>
</tr>
<tr>
<td>ITC</td>
<td>14,1%</td>
</tr>
<tr>
<td>PRODUCTION</td>
<td>14,0%</td>
</tr>
<tr>
<td>ENGINEERING</td>
<td>12,8%</td>
</tr>
<tr>
<td>FINANCE</td>
<td>11,8%</td>
</tr>
<tr>
<td>ADMINISTRATION</td>
<td>10,7%</td>
</tr>
<tr>
<td>HR</td>
<td>9,7%</td>
</tr>
<tr>
<td>SALES</td>
<td>9,3%</td>
</tr>
</tbody>
</table>

* The data provided by the company ELEMENT, www.elementapp.ai
The strongest, the most representative and influential HR organization in Poland.