

REPORT 2022

The HR services market 2021



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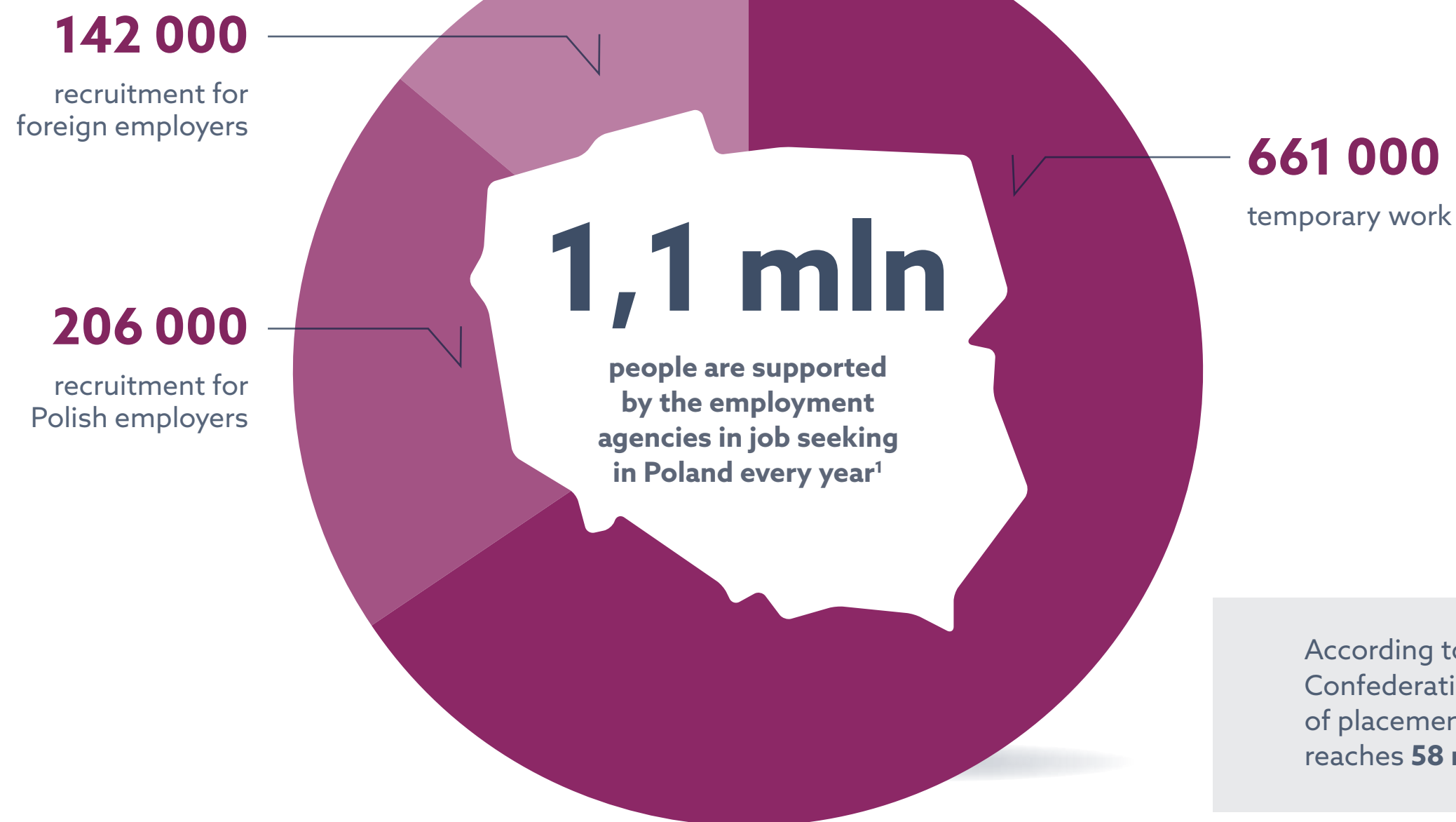
The results presented in the report as results of members of Polish HR Forum (PFHR) concern the data of 30 entities associated in the Polish HR Forum. Due to a change in the number of member companies, between 28 and 30 entities reported quarterly data. Where this factor disrupts market trends (see the section on recruitment and outsourcing), we have prepared an additional analysis based on the data of a fixed number of companies to do the best reflect on the development of services on the Polish market. Additionally, since 2021, the Polish HR Forum analyzes the data of member companies regarding services in the field of RPO.



1

the HR services market

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



According to World Employment Confederation (WEC) number of placements around the world reaches **58 million** people²

¹ Informacja o działalności agencji zatrudnienia w 2020 roku, MRPiT, 2021

² Economic Report 2022, World Employment Confederation, 2022 r. (dane za 2020 r.)

8950

number of employment
agencies in Poland in 2021³



5422

temporary work

7983

job placement (recruitment),
personal counseling,
career guidance

High rotation of entities on the market:

✓ **1909** number of new agencies
registered in 2021

✗ **1770** number of agencies removed
from the register in 2021⁴

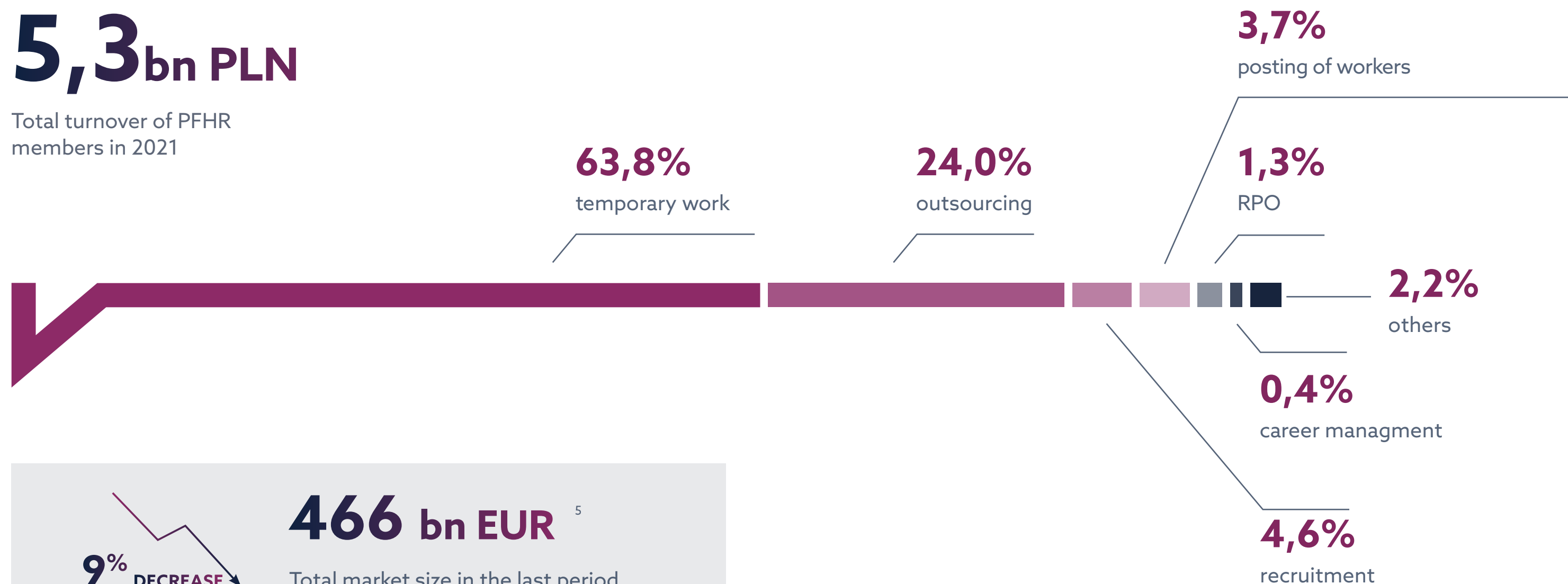
Each agency can provide services in both areas

³ kraz.gov.pl

⁴ kraz.gov.pl

5,3bn PLN

Total turnover of PFHR members in 2021



9%
DECREASE

466 bn EUR⁵

Total market size in the last period
(data for 2020)


⁵ Economic Report 2022, World Employment Confederation, 2022 r. (dane za 2020 r.)

Ranking of the largest PFHR companies in 2021

Total turnover

- 
- A vertical bar chart with a purple gradient bar. A purple star is at the top of the bar. The bars are numbered 1 to 10 on the left.
1. Randstad
 2. Grupa Adecco
 3. ManpowerGroup
 4. Trenkwalder
 5. OTTO Work Force
 6. Exact Systems
 7. Contrain
 8. Hays
 9. Job Impulse
 10. Gi Group

Agency work

- 
- A vertical bar chart with a purple gradient bar. A purple star is at the top of the bar. The bars are numbered 1 to 10 on the left.
1. Randstad
 2. Grupa Adecco
 3. ManpowerGroup
 4. Trenkwalder
 5. OTTO Work Force
 6. Job Impulse
 7. Gi Group
 8. Hays
 9. Kelly Services
 10. Contrain

Recruitment

- 
- A vertical bar chart with a purple gradient bar. A purple star is at the top of the bar. The bars are numbered 1 to 10 on the left.
1. Michael Page
 2. Hays
 3. Randstad
 4. Grafton
 5. Devire
 6. Antal
 7. Manpower
 8. Adecco
 9. Gi Group
 10. People

Outsourcing

- 
- A vertical bar chart with a purple gradient bar. A purple star is at the top of the bar. The bars are numbered 1 to 10 on the left.
1. Adecco
 2. Exact System
 3. Randstad
 4. Manpower
 5. Hays
 6. Antal
 7. Devire
 8. OTTO Workforce
 9. People
 10. Trenkwalder

Ranking of the largest PFHR companies in 2021

RPO

- 
- A vertical bar chart showing the ranking of the largest RPO companies in 2021. The bar is purple and has a star at the top. The companies are listed in descending order of rank.
1. Manpower
 2. Randstad
 3. Hays
 4. Antal
 5. Adecco
 6. Kelly Service
 7. Talent Place
 8. Devire
 9. People
 10. Trenkwalder

International recruitment

- 
- A vertical bar chart showing the ranking of the largest International recruitment companies in 2021. The bar is purple and has a star at the top. The companies are listed in descending order of rank.
1. OTTO Workforce
 2. Michael Page
 3. Hays
 4. Work Force
 5. Antal
 6. Adecco
 7. Talent Place
 8. 1 TO DRIVE
 9. Trenkwalder
 10. Orienta

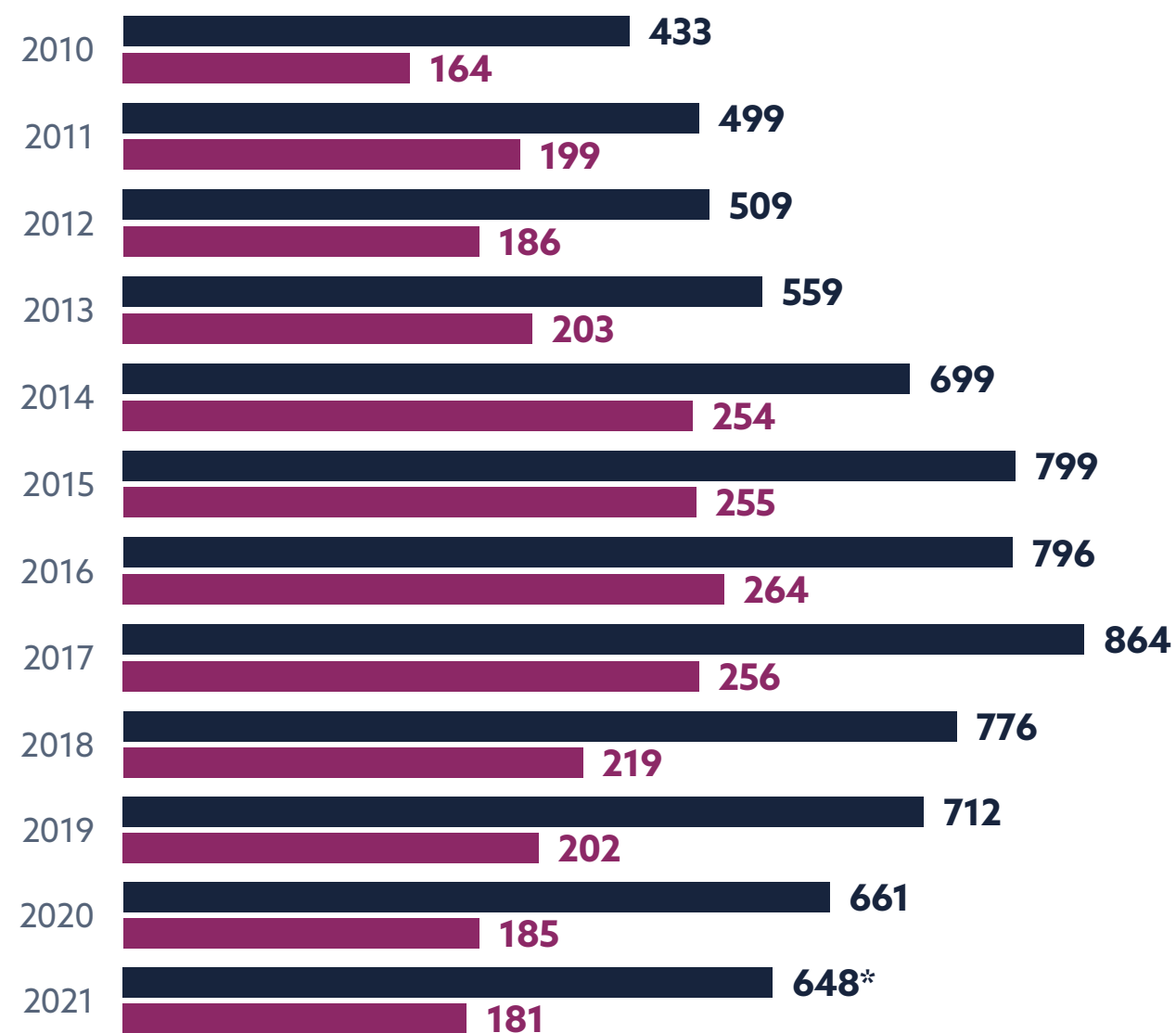
Career management

- 
- A vertical bar chart showing the ranking of the largest Career management companies in 2021. The bar is purple and has a star at the top. The companies are listed in descending order of rank.
1. Adecco
 2. Randstad
 3. Manpower
 4. Hays
 5. Antal
 6. Big Fish
 7. Trenkwalder
 8. People

2

agency work

Number of temporary workers in 2010 - 2021 (in thousands)



*estimated data

2% DECREASE in the number of temporary workers in 2021

40% of temporary workers are foreigners⁷
The leading group are citizens of Ukraine

Percentage of fixed-term employment contracts in temporary employment
87% in PFHR member companies
44% in the whole of Poland⁸

■ **Poland**⁶
■ **PFHR**

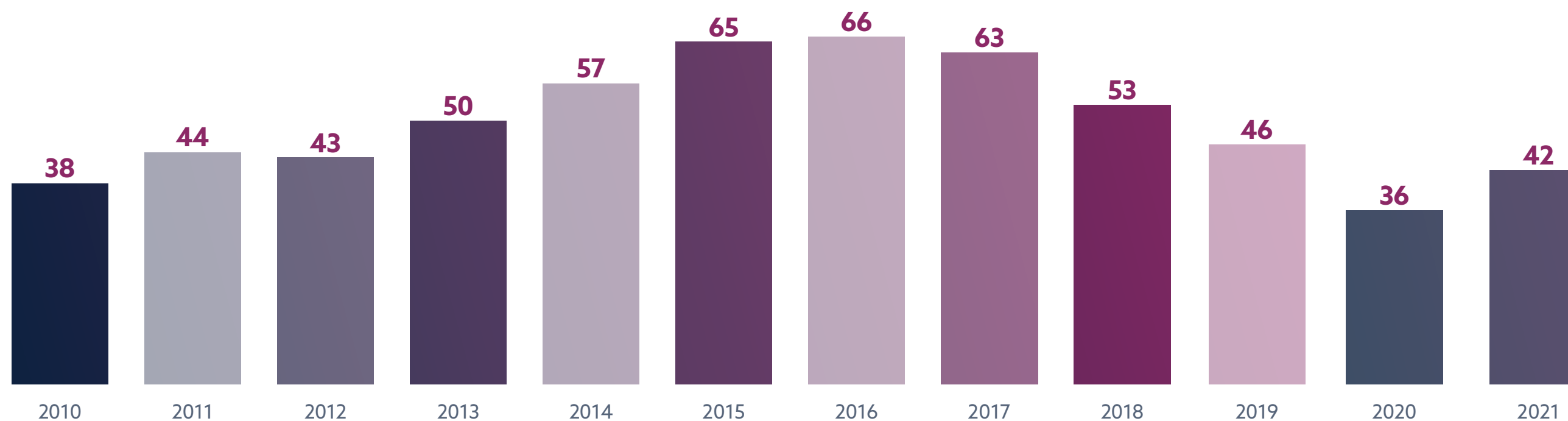
⁶ Informacja o działalności agencji zatrudnienia, 2011-2021

⁷ Informacja o działalności agencji zatrudnienia w 2020 roku, MRPiT, 2021

⁸ Informacja o działalności agencji zatrudnienia w 2020 roku, MRPiT, 2021

Length of the employment of temporary workers

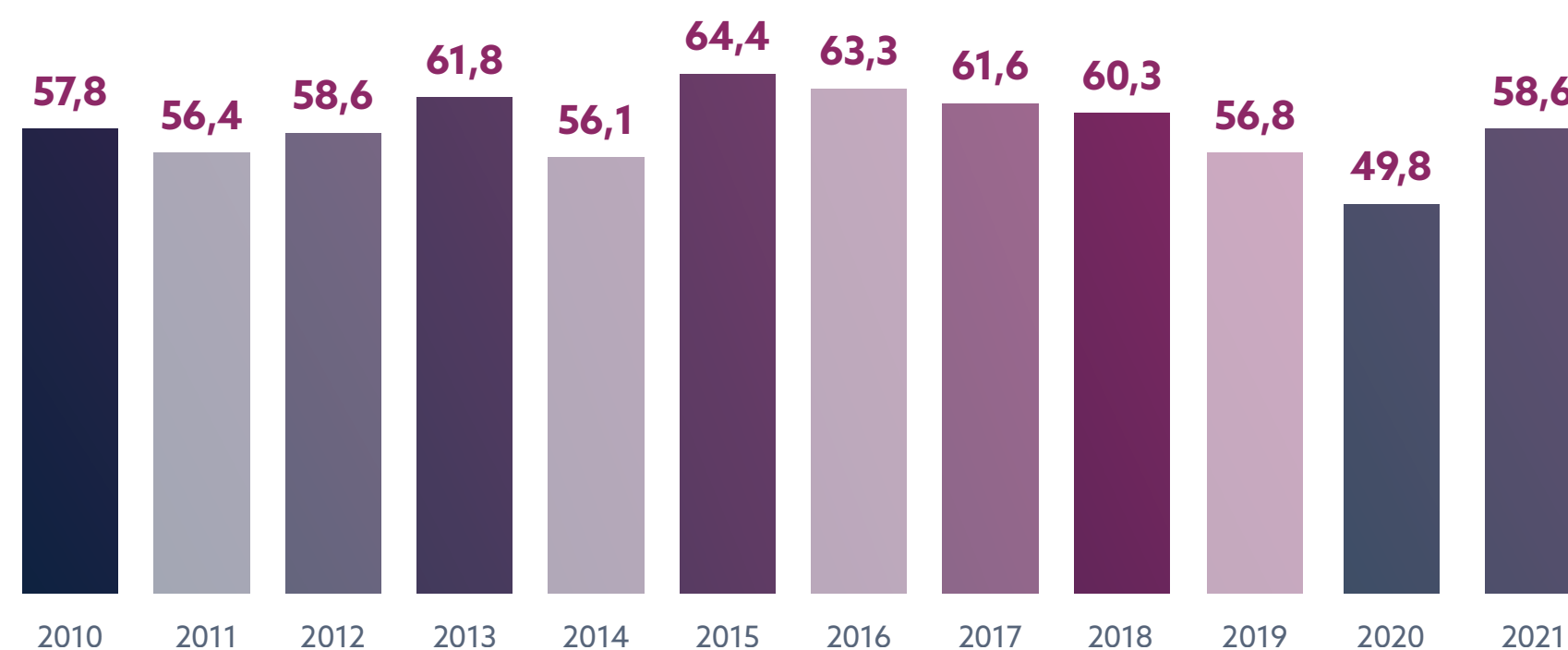
FTE (full time equivalent)
in PFHR (thous.) in 2010 - 2021



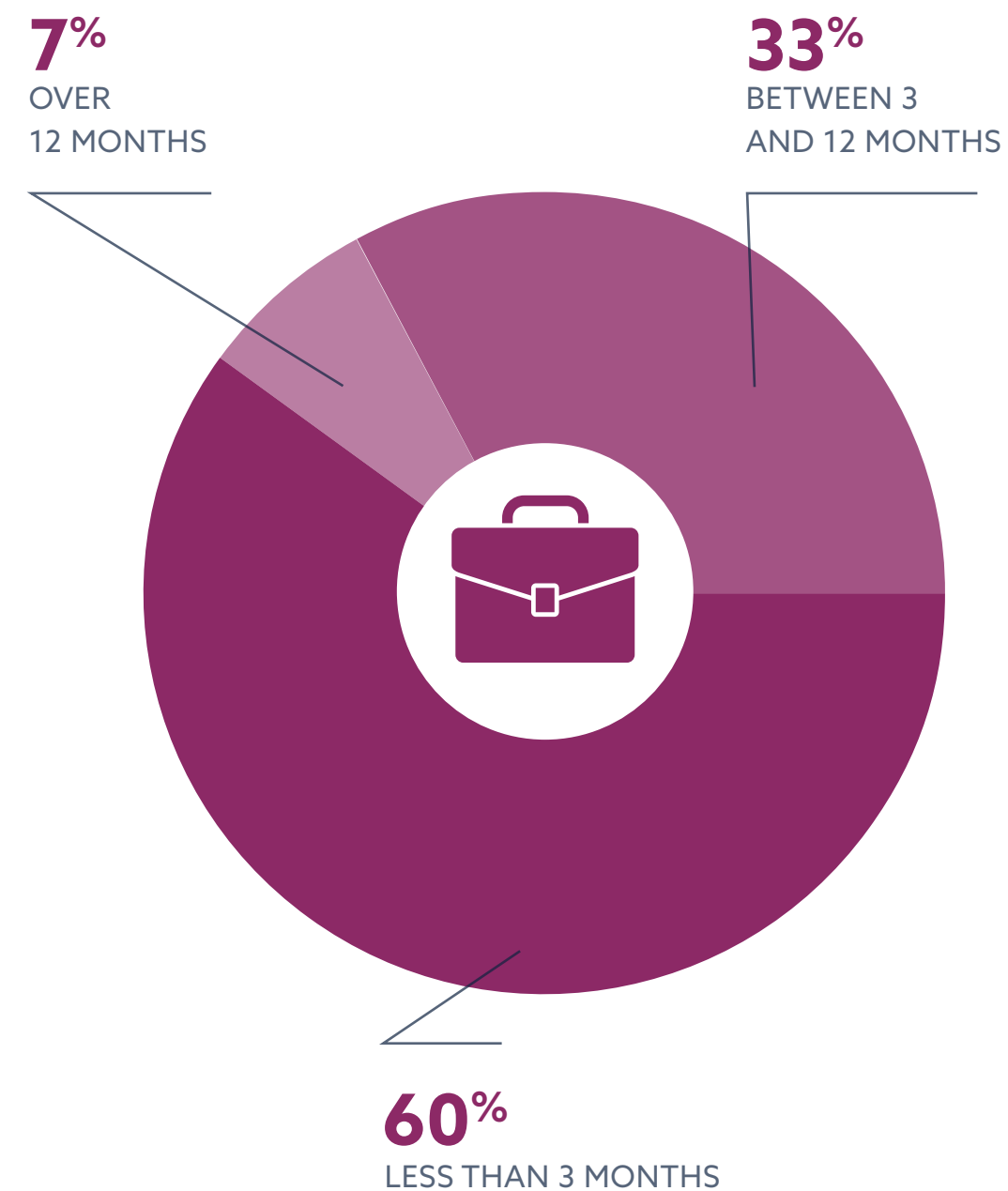
16%
INCREASE

increase in the number of hours worked
by temporary agency workers in terms
of full-time equivalents

Average period 49,8 of employment
(in days) of one temporary worker
in Poland in 2010 - 2021

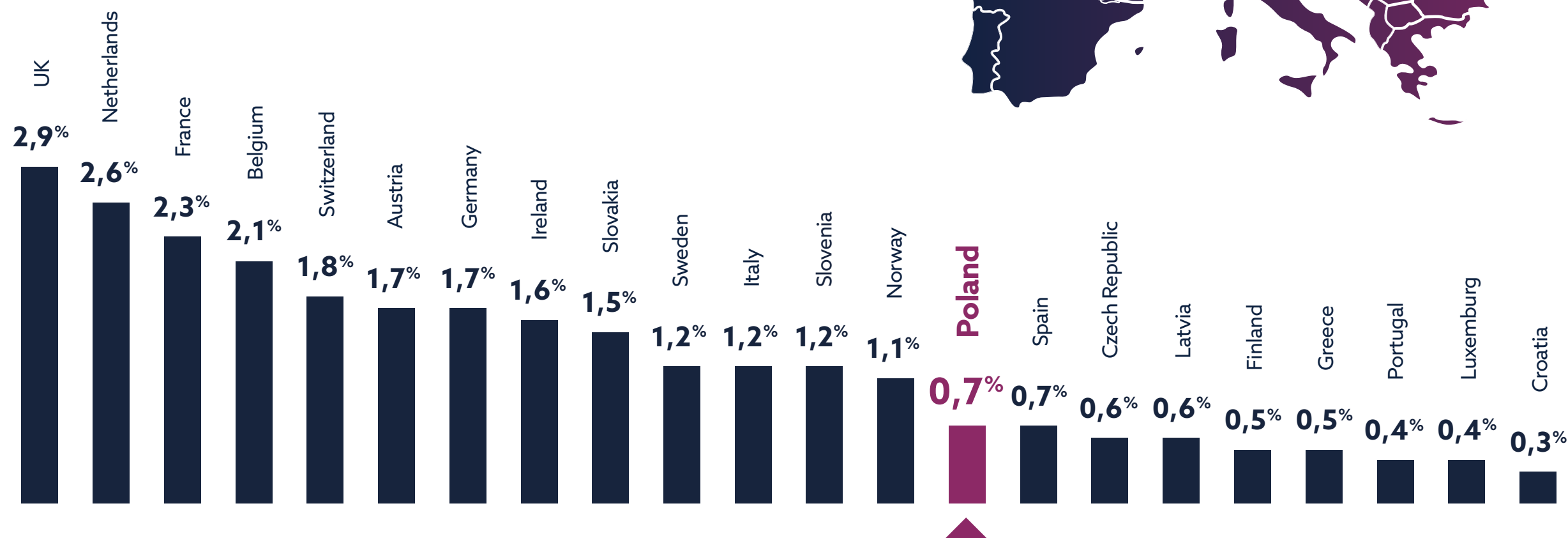


Percentage of temporary workers with a total employment period⁹



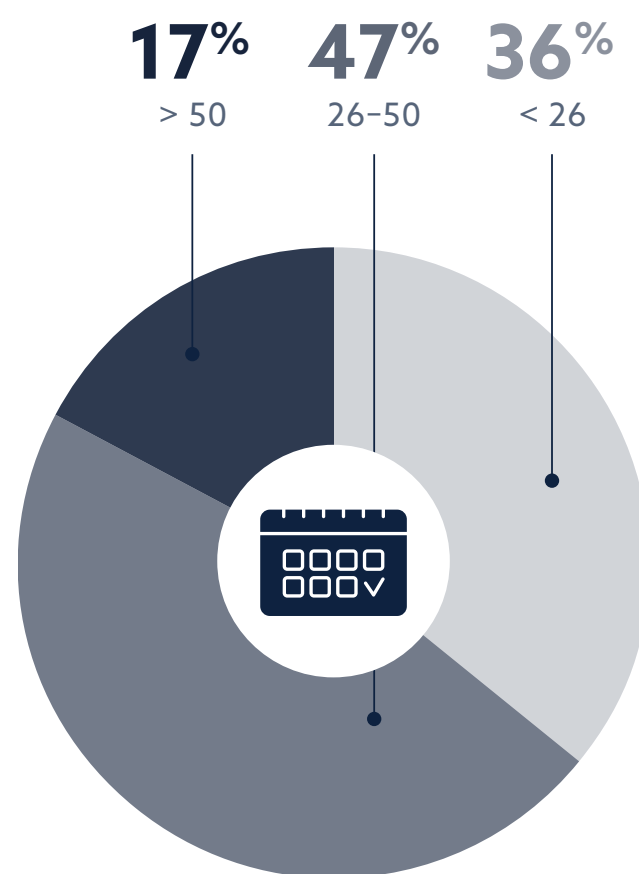
⁹ Informacja o działalności agencji zatrudnienia w 2020 roku, MRPIIT, 2021

The penetration rate in Poland was about 0,7%, the european average is 1,2% and the global is 1,5%¹⁰

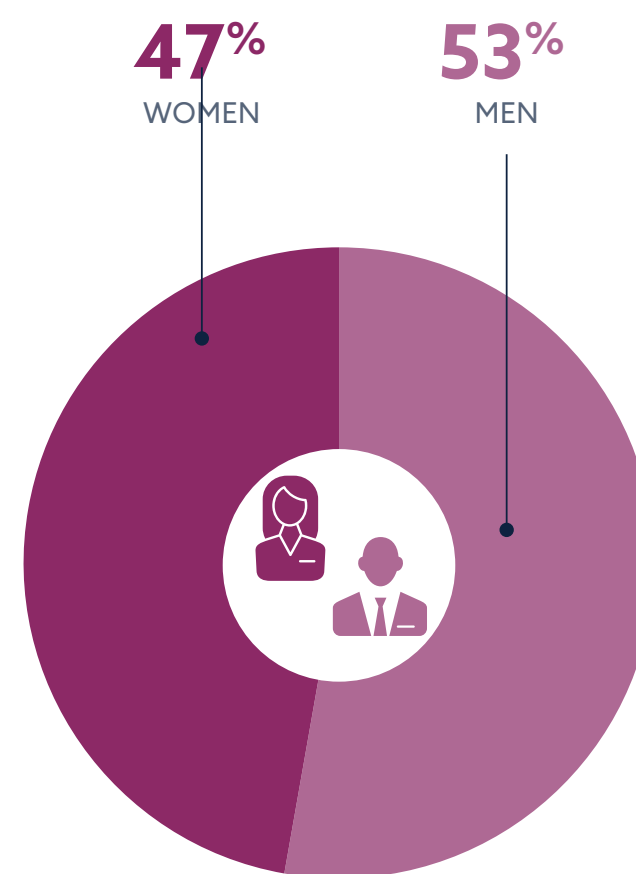


¹⁰ Economic Report 2022, World Employment Confederation, 2022 r., (dane za 2020 r.)

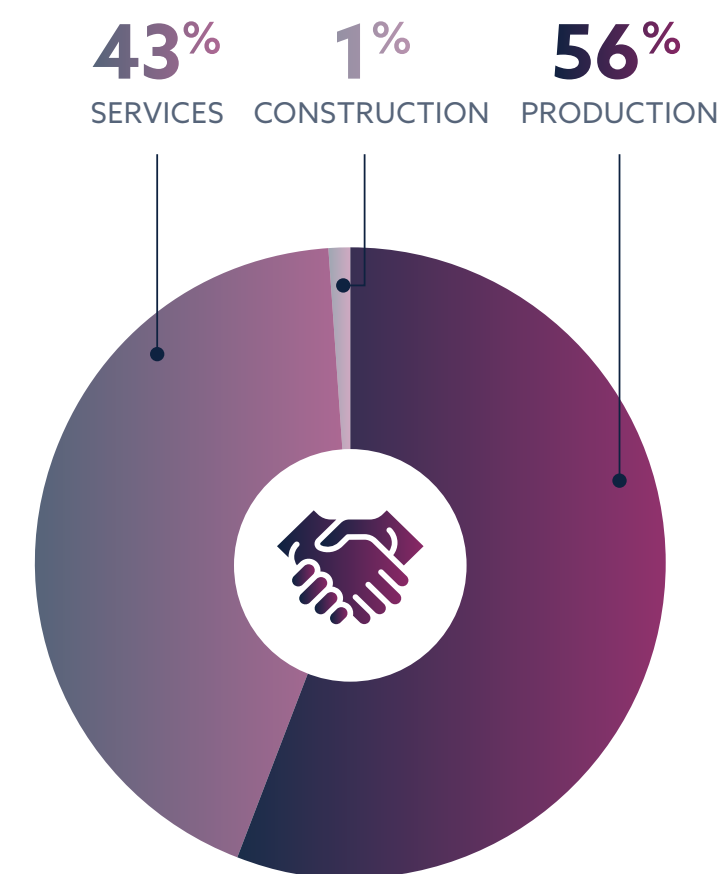
2 Temporary workers profile



AGE

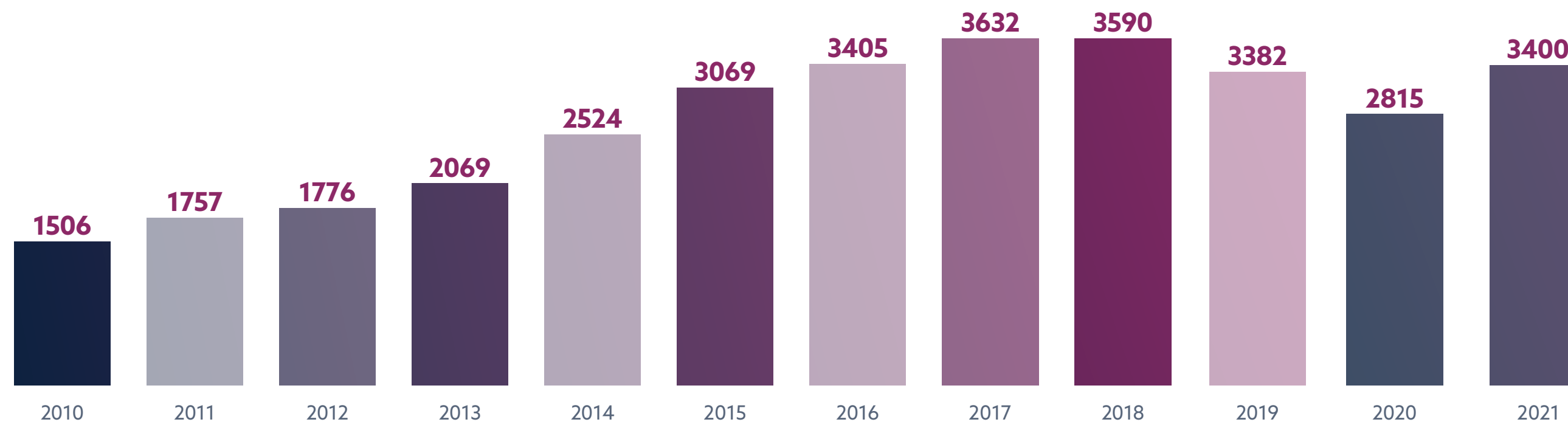


GENDER



EMPLOYMENT OF TEMPORARY
WORKERS IN SECTORS

Turnover of PFHR members in the field of temporary work in 2010 - 2021
(in PLN million)



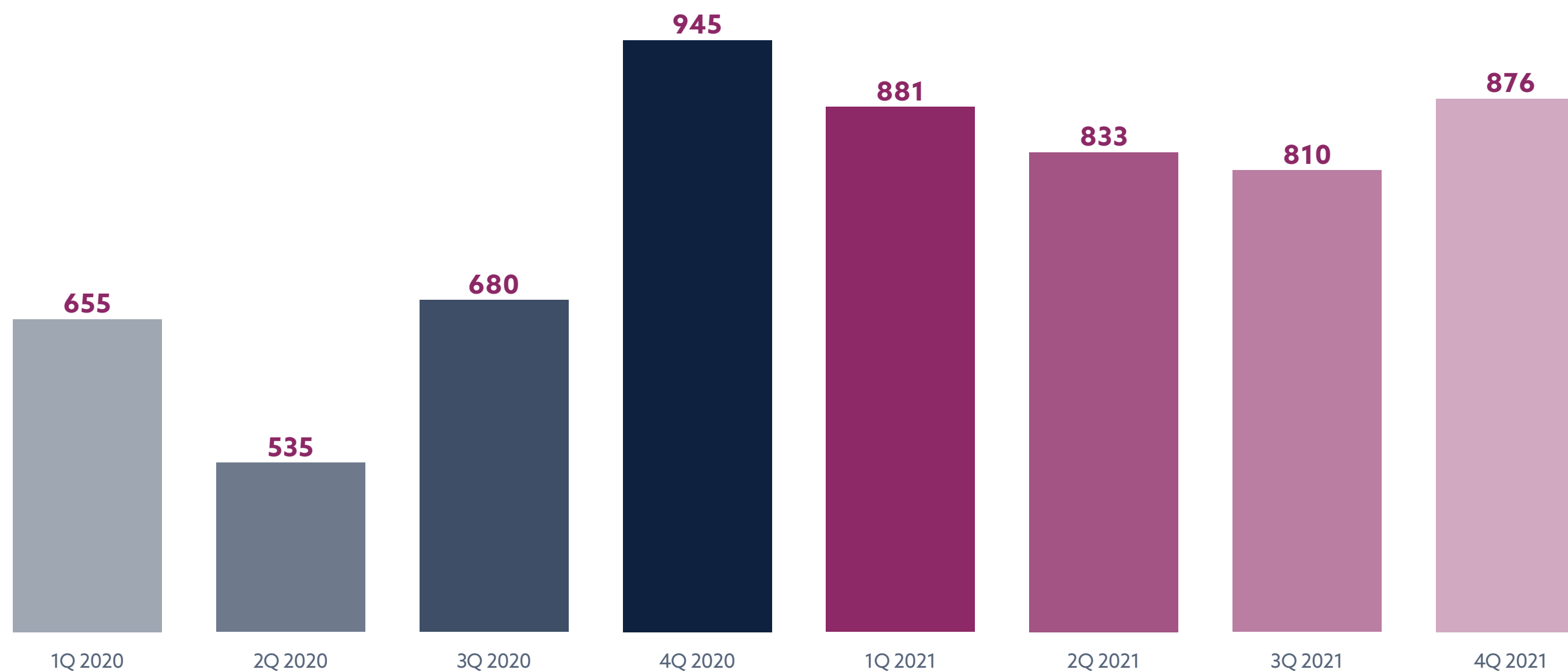
21%
INCREASE

increase of the turnover of the PFHR agency
within the temporary work service

6 bn PLN

ESTIMATED VALUE OF POLISH
TEMPORARY WORK MARKET

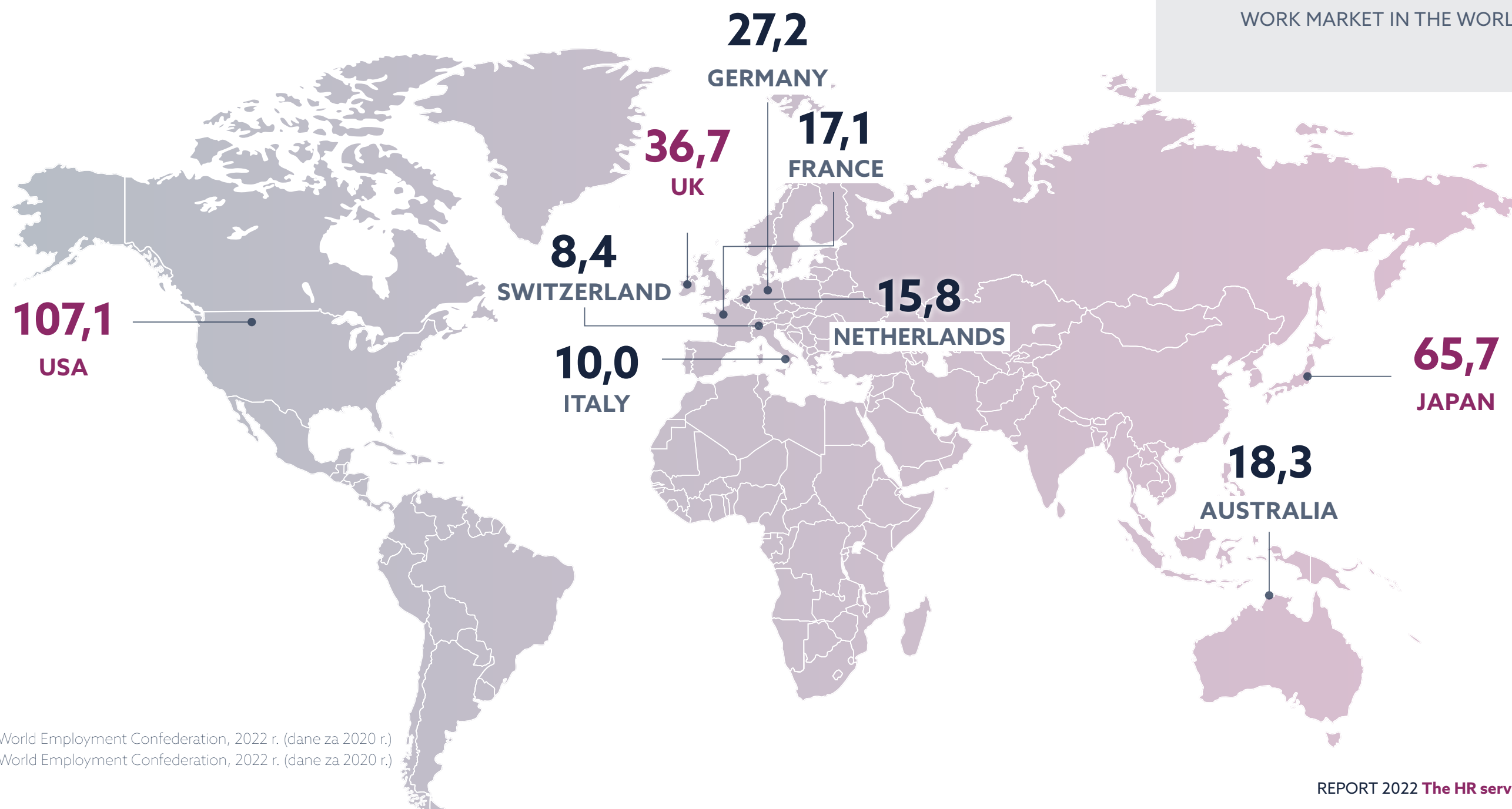
Quarterly turnover in temporary employment of PFHR agencies
in years 2020 - 2021 (in PLN million)



Ranking of the world's 9 largest markets by turnover (billion EUR)¹¹

268,7 bn EUR

VALUE OF THE TEMPORARY
WORK MARKET IN THE WORLD¹²



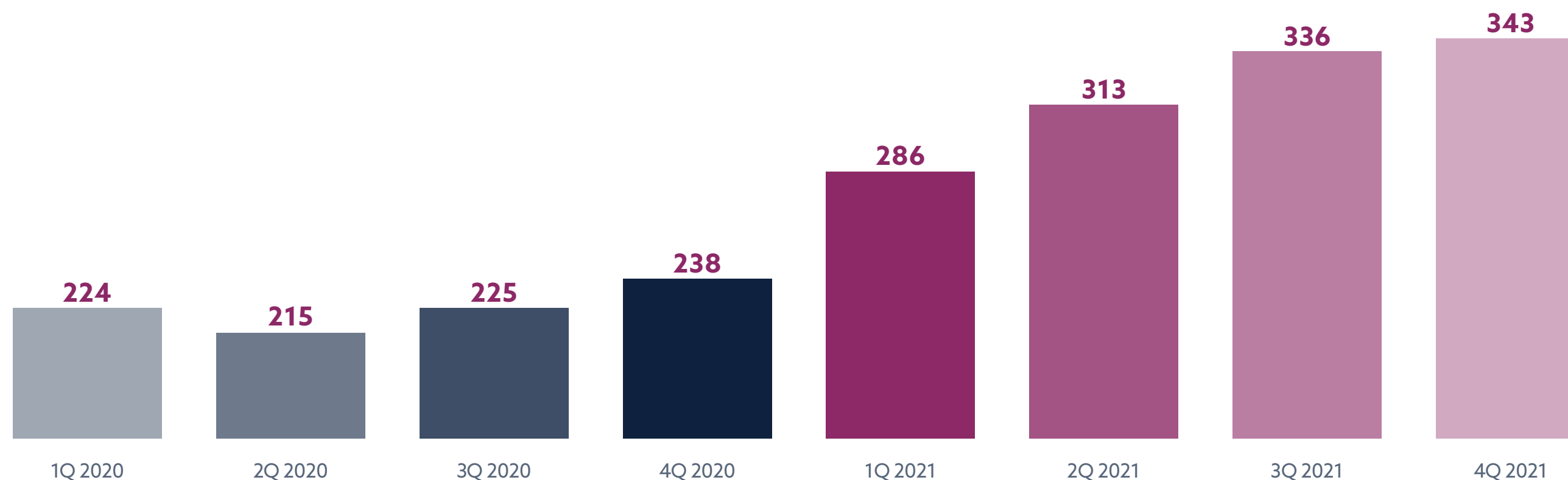
¹¹ Economic Report 2022, World Employment Confederation, 2022 r. (dane za 2020 r.)

¹² Economic Report 2022, World Employment Confederation, 2022 r. (dane za 2020 r.)

3

outsourcing

Quarterly turnover of the PFHR member companies in outsourcing services
in the years 2020 - 2021 (in PLN million)



1 278 mln PLN

THE VALUE OF PFHR MEMBERS IN THE FIELD
OF OUTSOURCING SERVICES IN 2021

15%
INCREASE

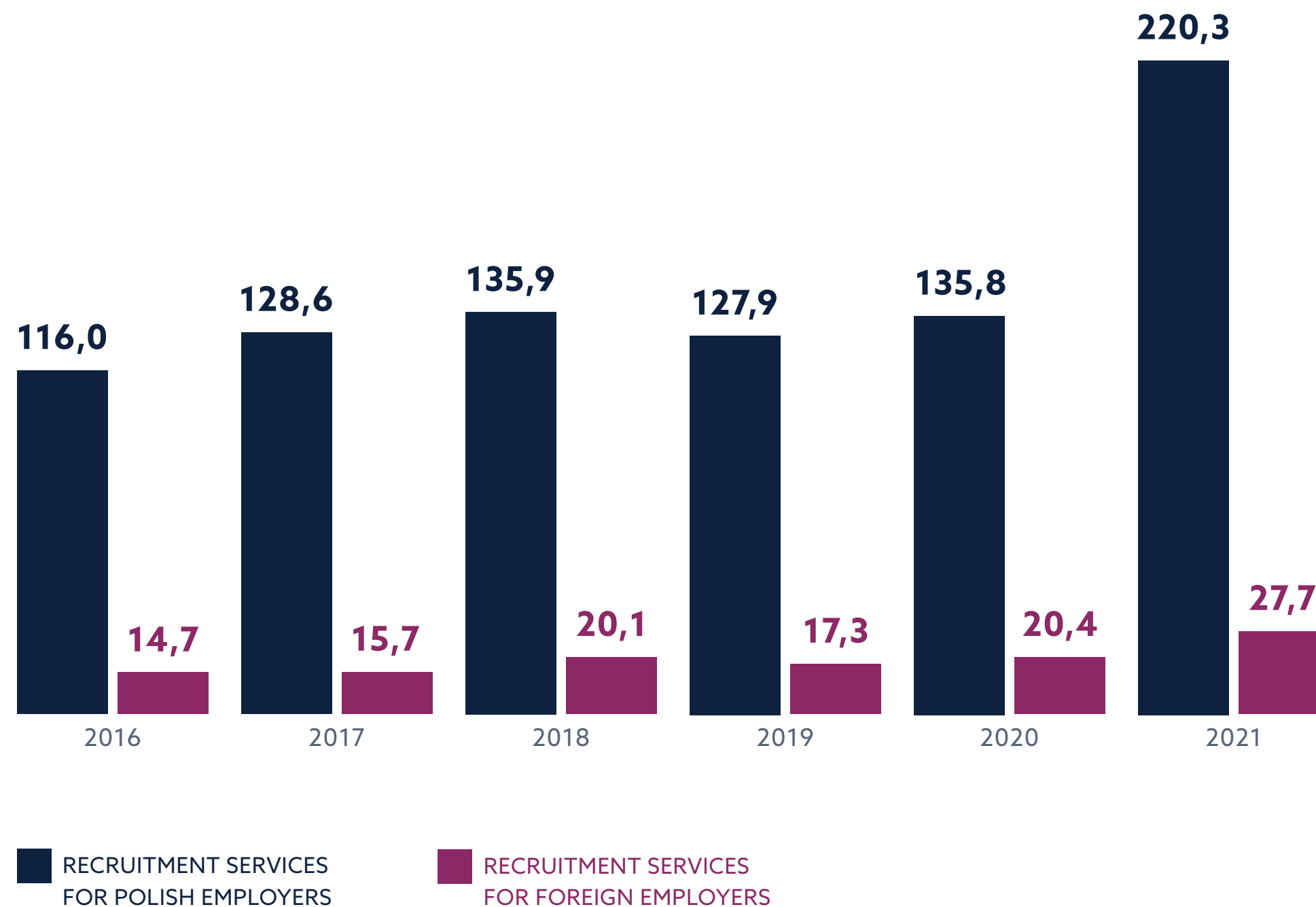
outsourcing market value growth in 2021

IMPORTANT: estimated market trend (based on results of the member companies of PFHR taking into account the correction resulting from due to the increase in the number of member companies)

4

recruitment

Value of the recruitment services market in PFHR in 2016 - 2021 (mln PLN)



248 mln PLN

The amount of turnover in sales of of recruitment services obtained by of member companies of the Polish HR Forum in 2021

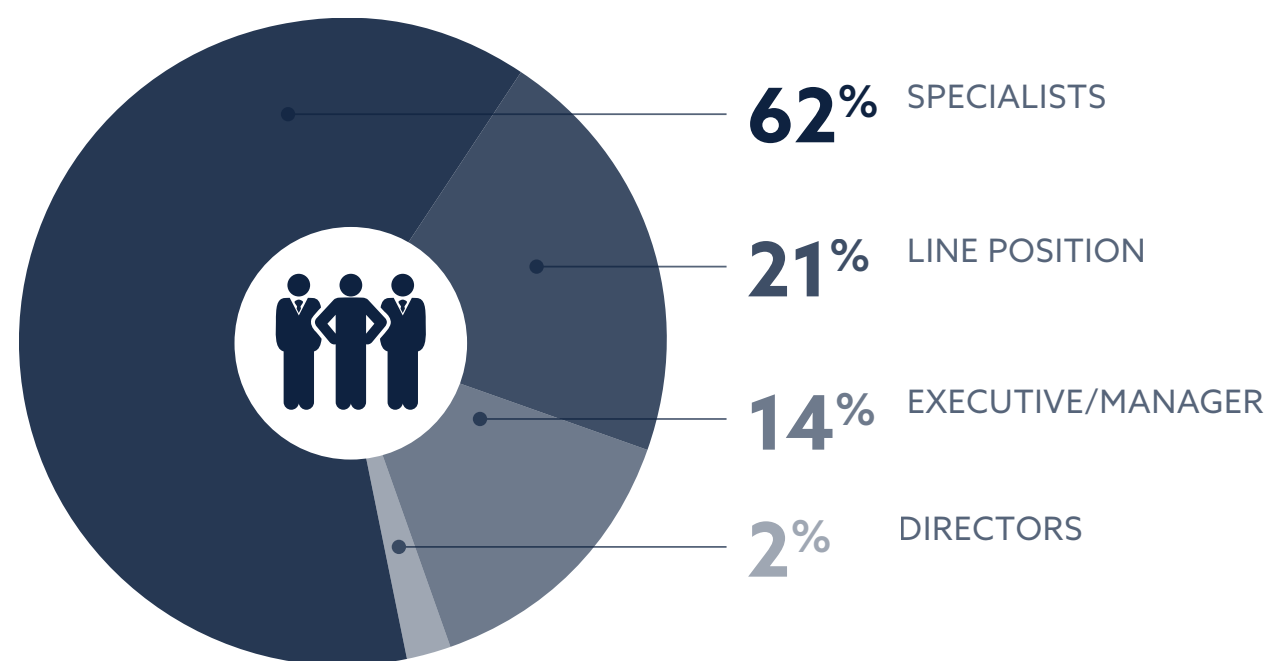
50% INCREASE Estimated growth of the recruitment market recruitment market for Polish employers

29% INCREASE Estimated growth of the recruitment market recruitment market for foreign employers

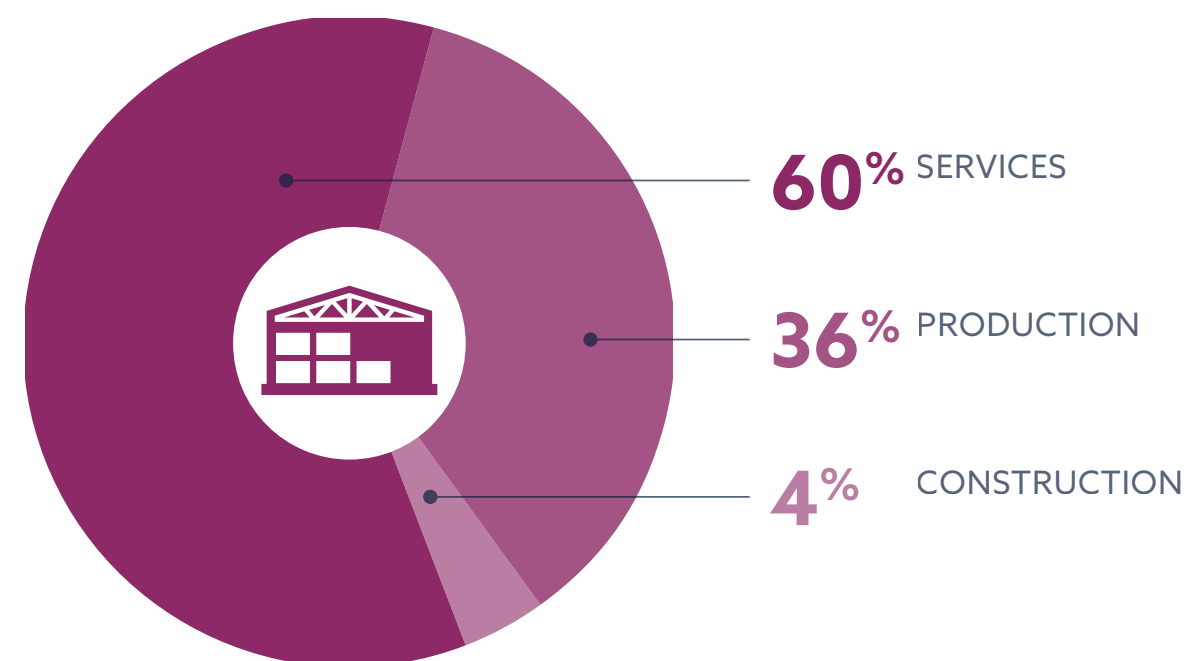
IMPORTANT: estimated market trends (based on the results of PFHR member companies taking into account an adjustment resulting from an increase in the number of member companies)

220,3 mln PLN

value of recruitment services for Polish employers
within PFHR members



LEVEL OF POSITION



SECTORS

4 International recruitment

27,7 mln PLN

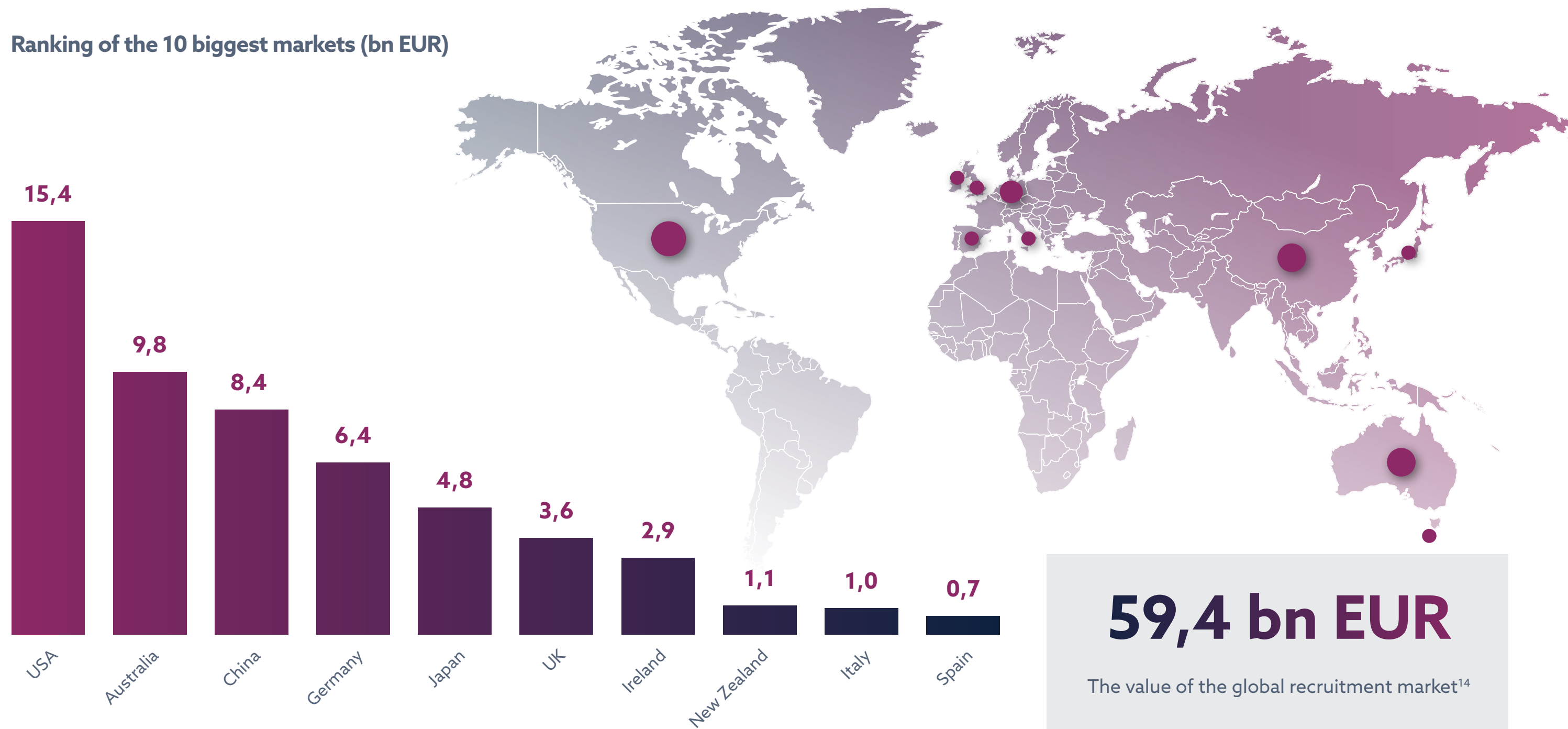
value of recruitment services for foreign employers within PFHR members

Countries to which agencies referred the most people to work for foreign employers¹³



¹³ Informacja o działalności agencji zatrudnienia w 2020 roku, MRPiT, 2021 r.

Ranking of the 10 biggest markets (bn EUR)

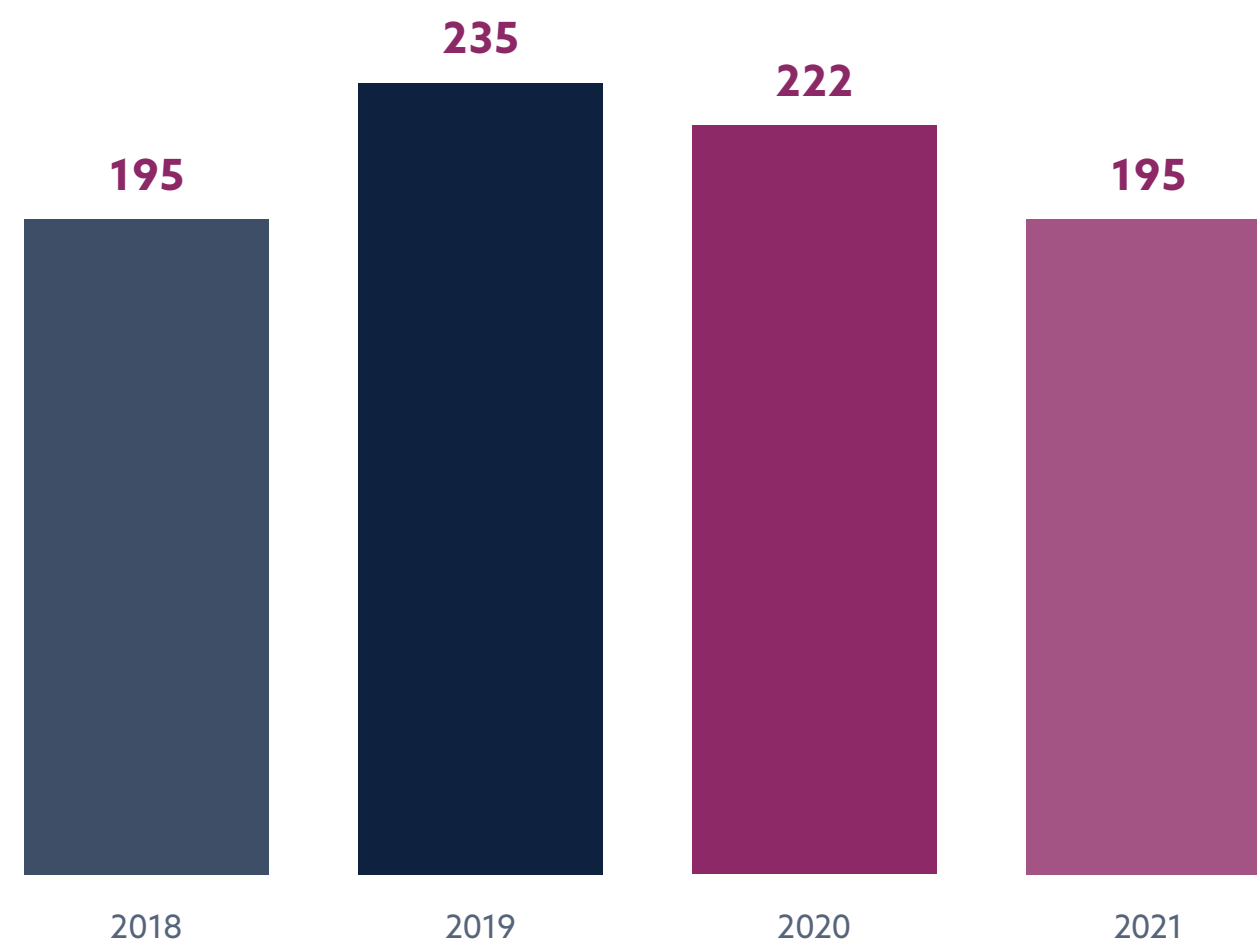
¹⁴ Economic Report 2022, World Employment Confederation, 2022 r. (dane za 2020 r.)

5

posting of workers

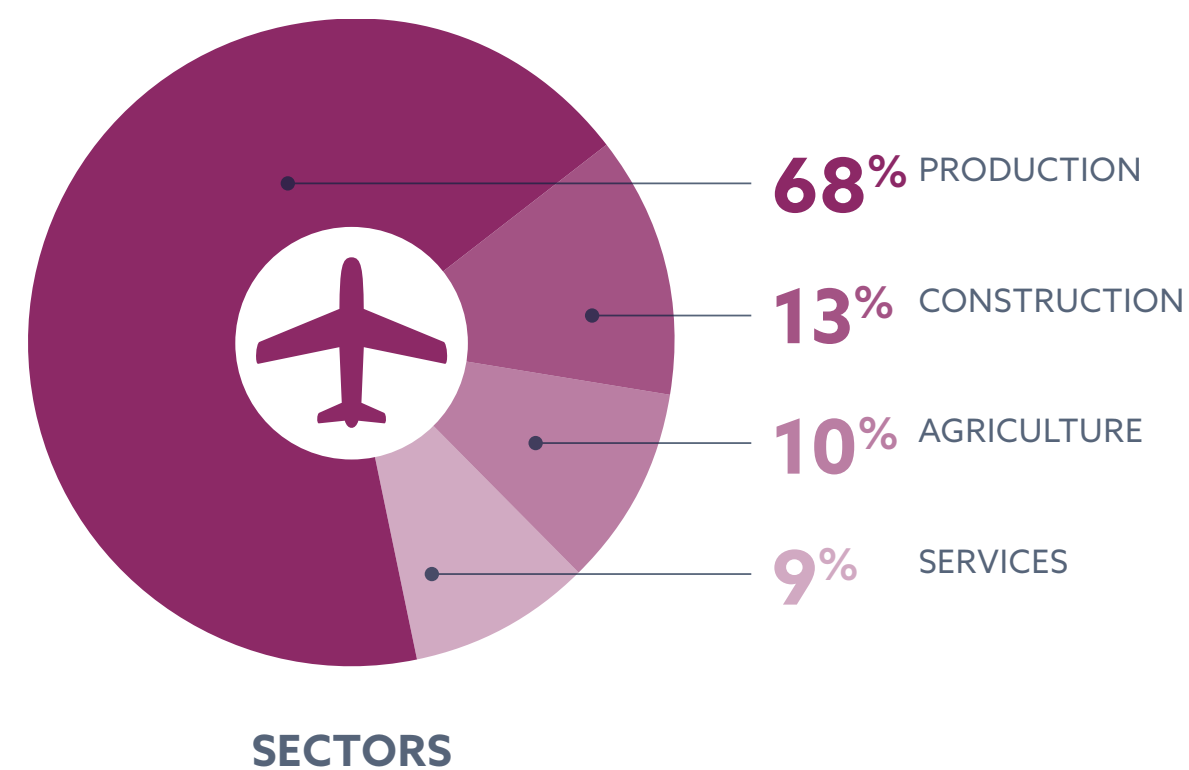
5 Posting of workers

Turnover of PFHR member companies in the field of posting of workers to foreign employers in the years 2018 - 2021 (in PLN million)



31 800

Number of temporary agency workers sent to foreign employers in 2020¹⁵



¹⁵ Informacja o działalności agencji zatrudnienia w 2020 roku, MRPiT, 2021 r.

5,1 bn EUR

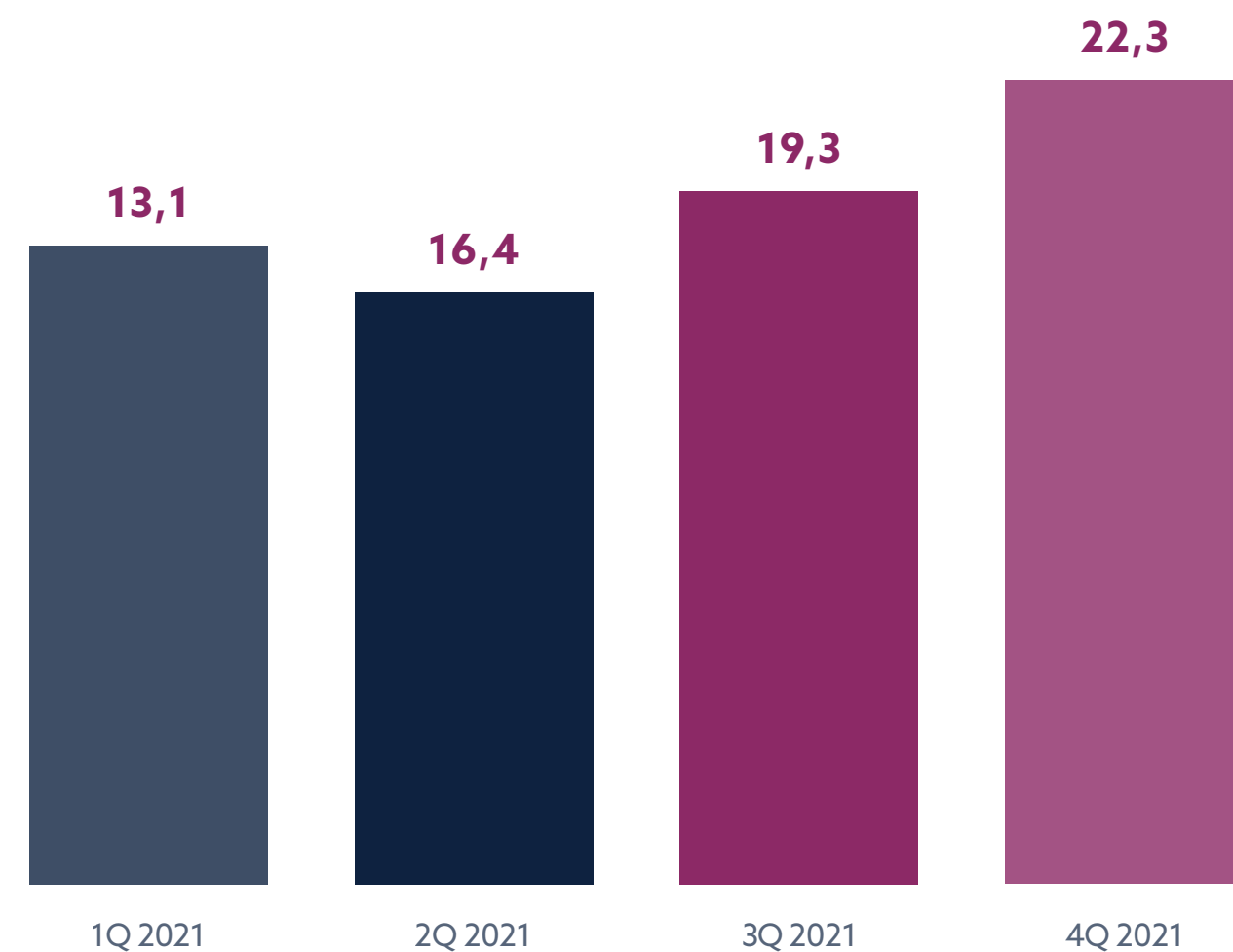
the value of the RPO market worldwide¹⁶

RPO Recruitment Process Outsourcing - a service provided by specialized external provider who takes on the role of client's recruitment department by taking over and managing part or the entire recruitment process and related partner relationships in the supply chain, providing the necessary skills, activities tools, technologies and process methodologies

71 mln PLN

turnover of PFHR member companies in RPO services in 2021

Quarterly turnover of PFHR member companies in terms of RPO services 2021 (in PLN million)



¹⁶ Economic Report 2022, World Employment Confederation, 2022 r., (dane za 2020 r.)

7

career management

Career management

Services in the field of upskilling and reskilling

Range of services:

Outplacement

- Individual Outplacement
- Group Outplacement

Carrier mobility

(redeployment, „internal outplacement“)

Talent attraction and selection

- Employer branding
- Assessment center
- Psychometric tests and questionnaires

Development of employee skills

- Evaluation 360 or 180
- Development center
- Career paths
- Career coaching
- Talent management
- Team development tools
- Introductory and improvement trainings

Efficiency of employees and the company

- Audit of HR processes
- Performance management
- Competency management
- Diversity management
- Remuneration systems
- Outsourcing HRBP
- Voluntary Redundancy Programs
- Succession plans
- Ethical Behavior Management in organisation

Employee engagement

- Employee engagement survey
- Job satisfaction survey
- Employee opinion polls

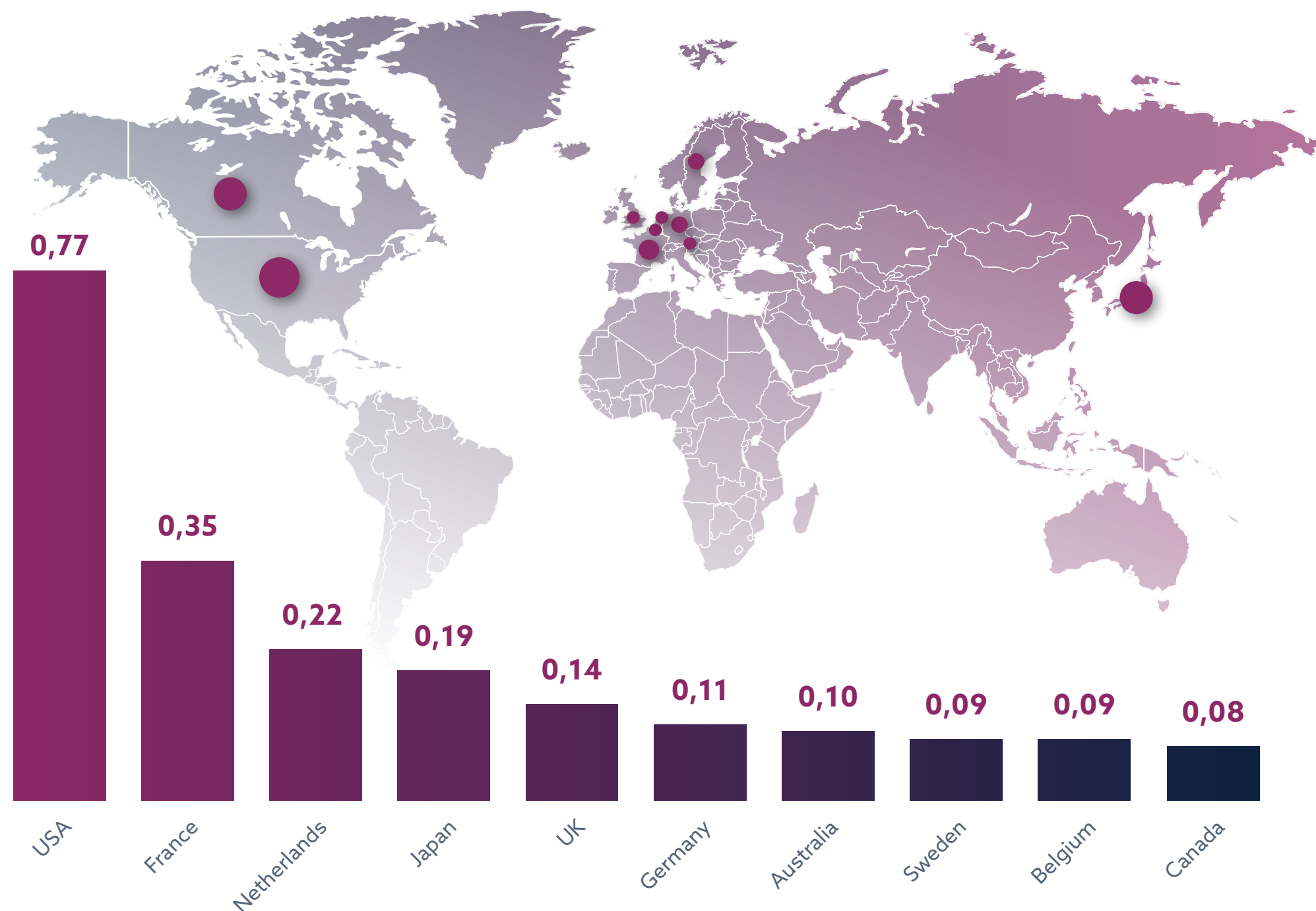
Ranking of the 10 biggest markets (bn EUR)

19,6 mln PLN

turnover of PFHR member companies
in the field of career management services

2,2 bn EUR

estimated value of the global market
for career management¹⁷



¹⁷ Economic Report 2022, World Employment Confederation, 2022 r., (dane za 2020 r.)

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