eurociett
European Confederation of Private Employment Agencies

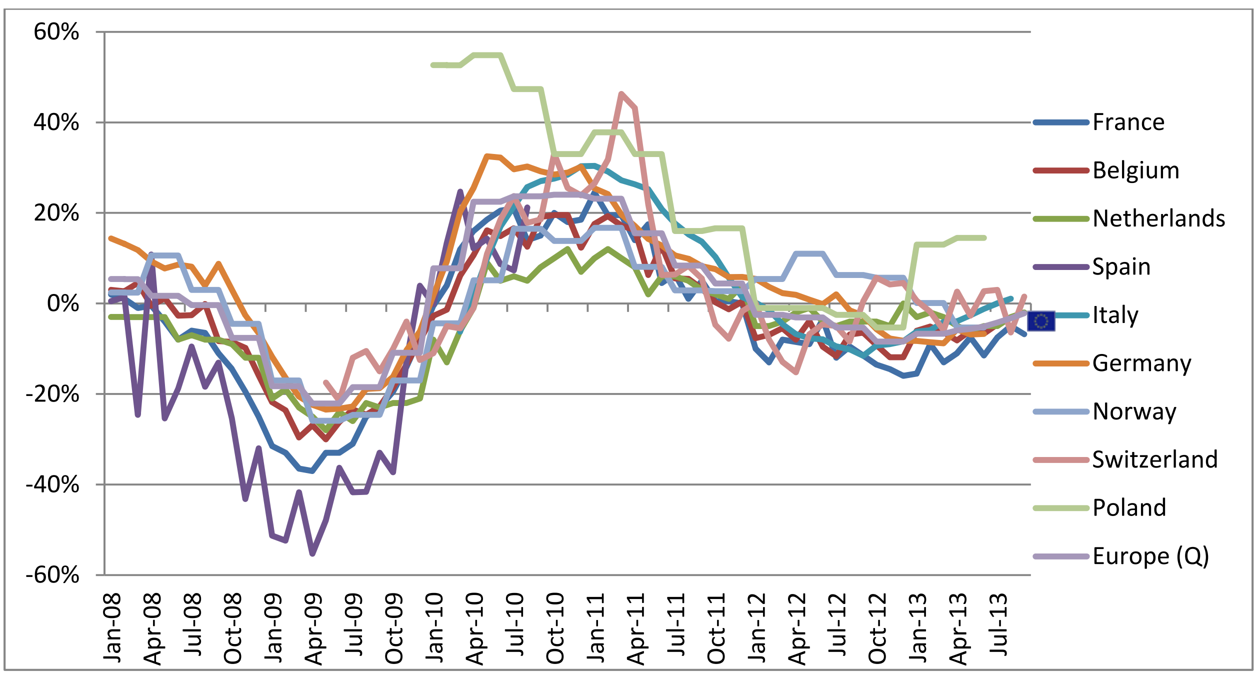
AGENCY WORK BUSINESS INDICATOR: OCTOBER 2013

1. EVOLUTION OF NUMBER OF HOURS WORKED BY AGENCY WORKERS IN EUROPE

	BE	FR	DE	IT	NL	CH	NO	PL	Europe[1]
Evolution of number of hours worked *[year-on-year]*	**-4.0%**	**-6.8%**	**-6.7%**	**1.1%**	**-2.0%**	**1.5%**	**-5.3%**	**+14.5%**	**-5.1%**
Period of reference	Sept 2013	Sept 2013	Jun 2013	Aug 2013	Weeks 37 to 40 of 2013	Sept 2013	Q2 2013	Q2 2013	Q2 2013

Source: Eurociett national federation members

Although the European average cannot be updated due to a lack of data from Germany, Poland and Norway, a slight improvement can be seen compared to the Q2 data. While the agency work industry in Europe experienced a decline of 5.1% in the second quarter compared with the same period in 2012, this average is now less negative. Based on available data, the European average would be -1.9% in August and -2.1% in September. Switzerland and Italy are leading the way up, with moderate positive figures, while the Netherlands is trailing closely behind with a decline of 2%, which is the smallest decline in 2013. In Belgium and France declines are slowing down too.



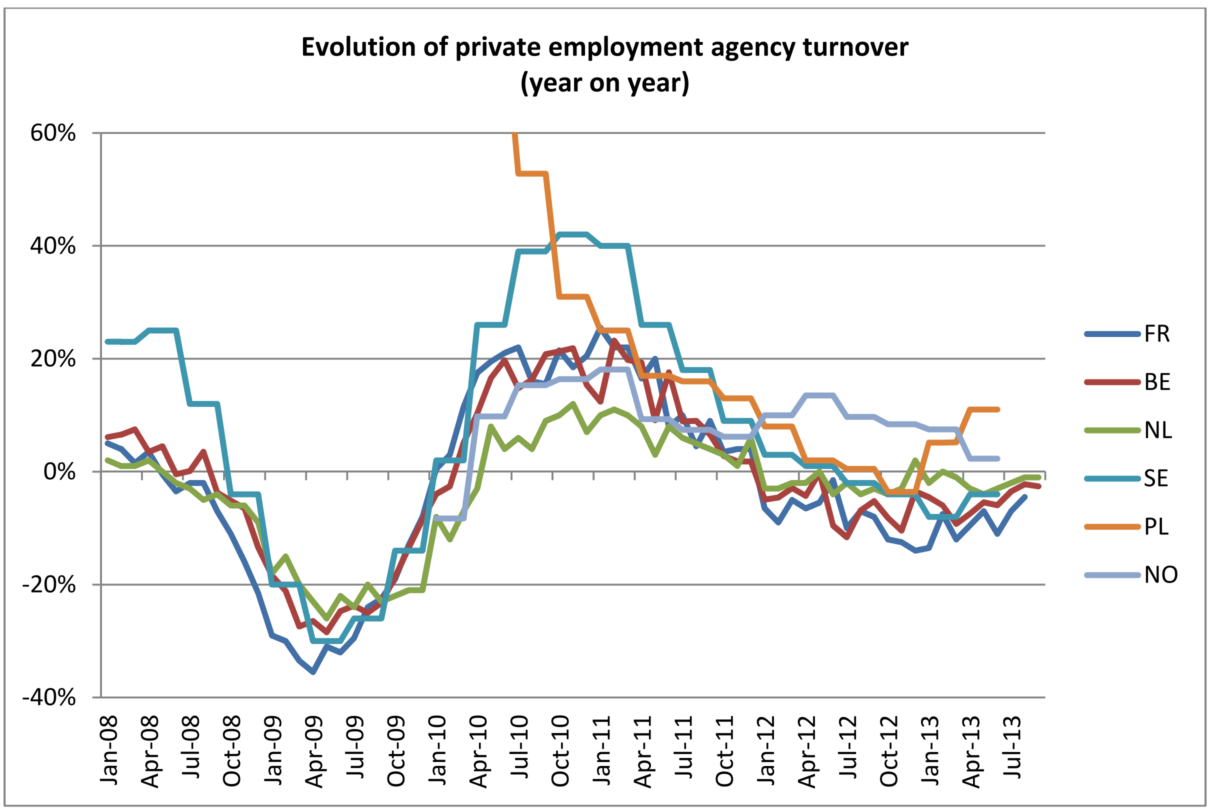
[1] The weighted European average is determined by the surveyed countries share of the European agency work market in 2011. The countries contributing to the weighted European Average account for 54% of the agency work market in Europe.

2. EVOLUTION OF AGENCY WORK SALES REVENUES IN EUROPE

	BE	FR	NL	NO	PL	SE
Evolution of turnover *[year-on-year]*	**-2.6%**	**-4.5%**	**-1.0%**	**+2.3%**	**+11.0%**	**-4.0%**
Period of reference	Sept 2013	Aug 2013	Weeks 37-402 2013	Q2 2013	Q2 2013	Q2 2013

Source: Eurociett national federation members

New data was only available for Belgium, France and the Netherlands, where each experienced an improvement compared to past months, although turnover is still declining compared to the same period last year.



Source: *Eurociett national federation members*/Eurostat

3. EUROCIETT NATIONAL FEDERATION COMMENTS

BELGIUM

In September 2013, the number of hours worked by temporary agency workers was -0.08% lower than a month earlier (seasonally adjusted data, corrected for calendar effects). An increase was observed in the blue-collar segment by 0.45%. Activity in the white-collar segment decreased by -0.79%. In comparison with September 2012, the activity in the temporary agency work industry declined by -4.01% (compared to -3.24% in August 2013) resulting from a fall in the blue collar segment (hours worked: -3.26%) and a fall in the white collar segment (-5.07%).

FRANCE

In August, temporary work turnover decreased -4.5% (year on year, number of days work adjusted). In the same time, number of hours worked declined -5%. Number of temps at work is still declining : after -7 in August 2013, the level of temps at works has reduced by 5.2% in September 2013 (in comparison with September 2012). On a regional level, it's in Auvergne, Midi-Pyrénées, Basse-Normandie and Poitou-Charentes that the decrease of temporary work employment has almost come to a halt, with trends ranging from 0 to -0.8 % in these regions.

NETHERLANDS

In period 10 (week 37 – 40) the total amount of hours decreased 2% and turnover declined 1%, in comparison with the same period last year. This period had an equal amount of workable days compared to the same period last year, so no correction was applied.

- The administrative sector decreased 1% in hours, turnover increased 1% in comparison to the same period in 2012.
- Hours in the industrial sector decreased 3% and turnover decreased 1% compared to the same period last year.
- Furthermore, the amount of worked hours in the technical sector decreased 1% compared to the same period last year, turnover decreased 1% as well.
- For the medical sector the amount of hours showed a decrease of 28% and turnover decreased 24%.

SWEDEN

Turnover in the second quarter of 2013 fell by 4% compared with the same quarter last year, which is a lower rate of decrease than in the first quarter. This represents a slowing down of the downturn that started in Q3 2012. The total turnover in the industry for the second quarter of 2013 amounted to SEK 5.2 billion. The largest change in the services is within recruitment, which fell by 22% in the second quarter compared with the same period last year. The decrease within staffing, the largest service area, was 5%, which is also a weakening trend compared with the decrease in the first quarter. The increase within outsourcing continued, +4%. From an occupational perspective, sales are greatest within industry/manufacturing (25% of total sales), warehousing/logistics (17%), office/administration (15%), accounting/finance (10%) and health/medical care (7%). Compared with the same period last year, the change in the second quarter of 2013 for these areas was industry/manufacturing -8%, warehousing/logistics +6%, office/administration -13%, accounting/finance -7% and health/medical care +5 %.

UK

September data signalled a further increase in agencies' temporary/contract staff billings. Although moderating from the 15-year high posted in August, the rate of growth remained strong. The Midlands saw the fastest increase in temp billings during September, while the South posted the slowest rise.

4. EXPLANATORY NOTE

ABOUT THE EUROCIETT AGENCY WORK BUSINESS INDICATOR

The Eurociett Agency Work Business Indicator plots indicators of the evolution of turnover (defined as the revenues generated by private employment agencies in the temporary staffing segment) and hours worked. (defined as the sum of all hours invoiced by all private employment agencies to all user companies except where otherwise stated) In Germany, the indicator is total number of agency workers and the indicator for Switzerland is number of workable days).

Data supplied by the national federations of agency work is also plotted against the evolution of GDP and unemployment volumes in the European Union. In 2011, Europe accounted for 40% of the global agency work market by revenue,, and placing 4 million agency workers in full-time equivalent on a daily basis.

Currently no quantitative data is available for the UK. Information for the UK national federation (REC) update originally appeared in the Report on Jobs. The Report on Jobs is a monthly publication produced by Markit on behalf of the Recruitment & Employment Confederation and KPMG. The report features original survey data which provide the most up-to-date and comprehensive monthly picture of recruitment, employment and employee earnings trends available.

WEIGHTED EUROPEAN AVERAGE OF HOURS WORKED BY TEMPORARY AGENCY WORKERS

The weighted European Average is the year on year change of agency workers in full-time equivalent employment on a daily basis (except where noted otherwise). The weighted average determined by the surveyed countries share of the European agency work market in 2011. The countries contributing to the weighted European Average account for 54% of the agency work market in Europe. The EU average is calculated by adding the individual country figures multiplied by their percentage of the agency work industry in Europe, then scaling the figures to one hundred percent.

COUNTRY WEIGHTINGS

France: 14.5% of the European agency work market/Source Prism'Emploi
Belgium: 2.3% of the European agency work market/Source Federgon
Netherlands: 5.5% of the European agency work market/Source ABU
Italy: 5.6% of the European agency work market/Source Ebitemp
Germany: 20.4% of the European agency work market/Source BAP
Switzerland: 1.8% of the European Agency work market / Source SwissStaffing
Norway: 0.6% of the European Agency work market / Source NHO
Poland: 4.0% of the European Agency work market / Source Polskie Forum HR

EUROCIETT

As the European Confederation of Private Employment Services, Eurociett is the authoritative voice representing the common interests of the agency work industry in Europe. Eurociett gathers 30 national federations from EU and EFTA countries, and 6 of the largest international staffing companies as corporate members. Its main objective is to seek greater recognition for the positive role private employment agencies play in the labour market.

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