









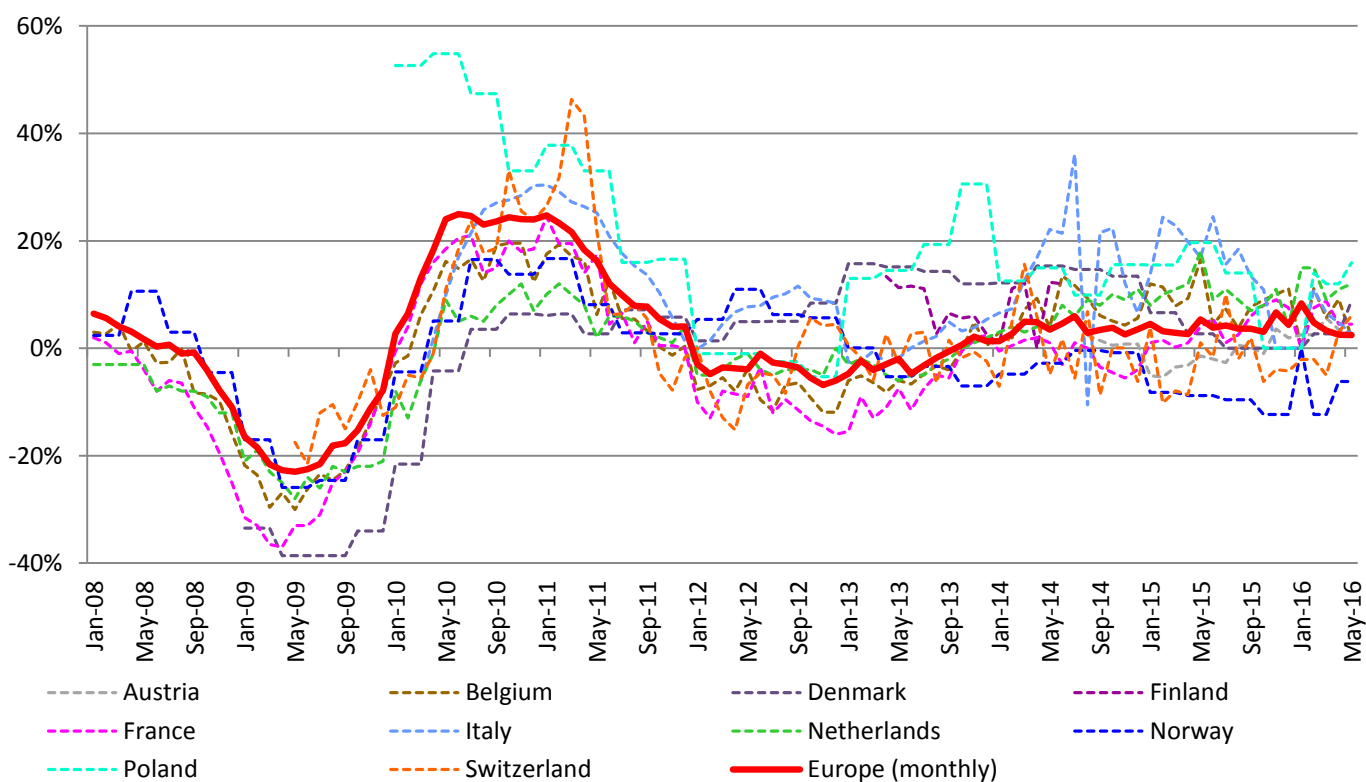


EVOLUTION OF NUMBER OF HOURS WORKED BY AGENCY WORKERS IN EUROPE

	AT	BE	CH	DK	FR	IT	NL	NO	PL	Europe ¹
										
Evolution of number of hours worked [year-on-year]	+6%	+4%	-8.9%	+8.9%	+8%	-4.8%	+10%	-6.2%	+15.9%	+2.8%
Period of reference	May 2016	May 2016	May 2016	Q4 2015	Apr 2016	Apr 2016	Weeks 17 - 20 2016	Q1 2016	Q1 2016	June 2016

Source: Eurociett national federation members









The average number of hours worked by agency workers across Europe grew 2.8 % year-on-year compared with the same period last year. Poland and the Netherlands showed the strongest performance at 15.9% and 10% growth respectively, with Denmark and France also delivering solid growth at 8.9% and 8%. Switzerland and Italy have slipped into negative growth year-on-year for the first time and Norway continues to record a contracting agency work market. Data for Germany is not included in this month due to changes in data collection at the federal employment agency.



Source: Eurociett national federation members

¹ The weighted European average is determined by the surveyed countries share of the European agency work market in 2014. The 9 countries contributing to the weighted European Average account for 41.7% of the agency work market in Europe.

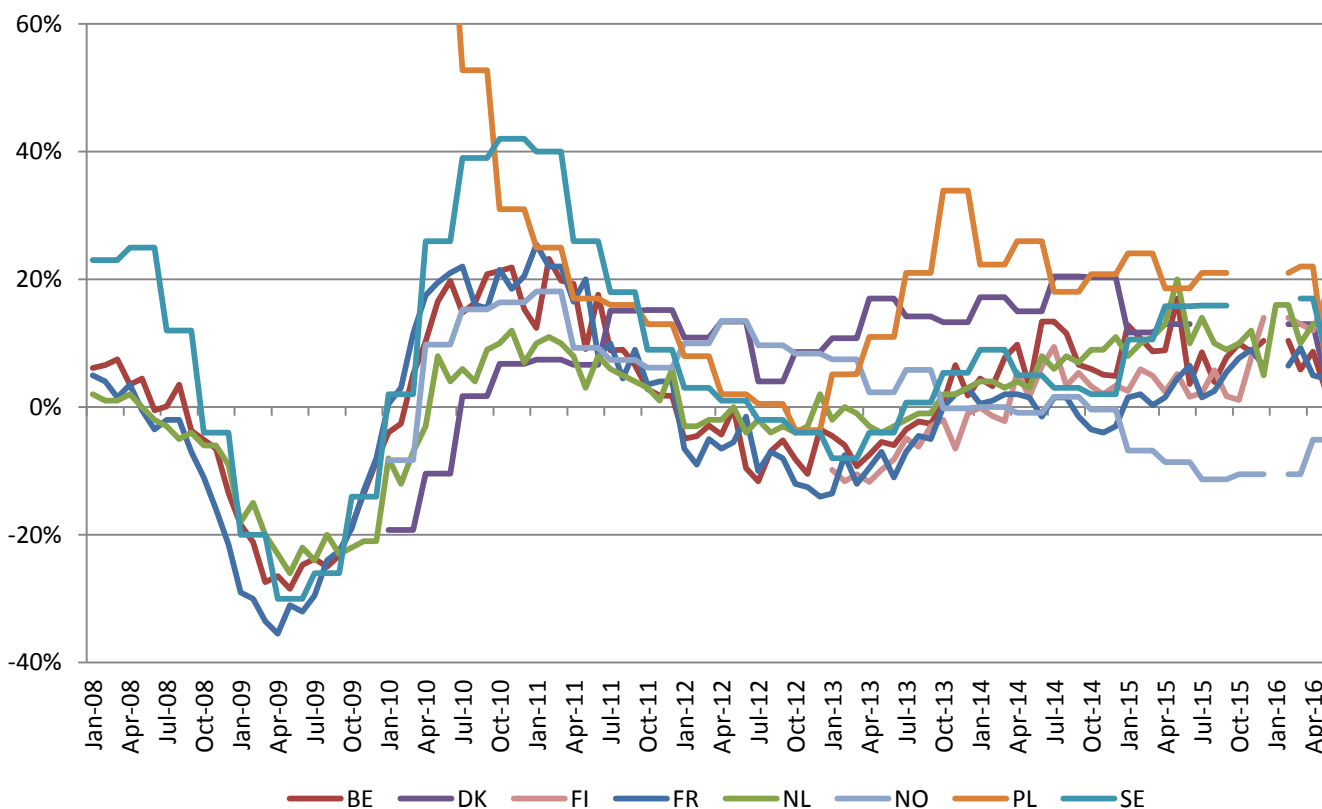
EVOLUTION OF AGENCY WORK SALES REVENUES IN EUROPE

	BE	DK	FI	FR	NL	NO	PL	SE
								
Evolution of turnover [year-on-year]	+2.8%	+4.8%	+14%	+8%	+11%	-5.1%	+7.5%	+9%
Period of reference	May 2016	Q4 2015	May 2016	Apr 2016	Weeks 17 - 20 2016	Q1 2016	Q1 2016	Q1 2016

Source: Eurociett national federation members

Agency work sales revenues for the latest period reveal solid growth across all markets with the exception of Norway. Finland and the Netherlands show double-digit growth at 14% and 11% respectively. Sweden, France and Poland record a pleasing uplift of turnover at 9%, 8% and 7.5% each.

Evolution of private employment agency turnover (year on year)



Source: Eurociett national federation members

Austria

Austria has shown consistent positive growth versus the previous year for more than six months now. It is also recording a growth in hours worked for the third consecutive quarter

Belgium

In comparison with April temporary agency work industry grew by 2.69% in May 2016. Both the blue collar and white collar segments grew, recording an uplift of 3.82% and 4.40% respectively.

France

In April, temporary work turnover and number of hours worked both increased by 8% in comparison with April 2015. Since the beginning of 2016 temporary work turnover has grown by 6.5%. Trends in May have been disrupted by a large number of holidays. Despite a negative base effect (1,8% in April 2015 and 4,3% in May 2015) , growth of temporary employment has remained in a positive dynamic during the month.

Finland

Finland has changed the way in which it collects its data on agency hours worked this year hence we will not be able to compare year-on-year data until January 2017. However, April figures on evolution of turnover show xxxx on the previous month and turnover increased on April 2015.

Germany

Germany is not included in this month's AWBI as validated figures for the latest period are not possible due to a change in the data from the federal employment agency. It is hoped that Germany will return to the Indicator in the autumn when reliable data is once again available.

Netherlands

In period 5 (week 17 – 20) the total amount of hours increased 10% and turnover grew 11%, in comparison to 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 increased 13% in hours and also turnover grew 10% in comparison to the same period in 2015.
- Hours in the industrial sector increased 8% and turnover increased 10% compared to the same period last year.
- Furthermore, the amount of worked hours in the technical sector increased 6% and turnover increased 13%

Switzerland

Temporary agency work moved into negative growth in May 2016, following positive growth in March and April. The number of hours worked was -8.9% lower than for May 2015. Growth since the start of the year is just 0.6%, growth over the past 12 months has been 1.7%.

UK

Agencies' billings from the employment of temporary/contract staff continued to rise in May. The rate of growth eased from the 13-month high registered in April, but remained marked overall. There were again reports that the new National Living Wage had contributed to a higher value of agency billings.

Temp billings increased across the English regions, with the strongest growth indicated in the North.

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 2012, Europe accounted for 36% 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 on the number of hours worked is available for the UK. Information for the UK national federation (REC) update originally appear 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 (turnover) in 2012. The countries contributing to the weighted European Average account for 62.4% 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

Updated March 2016 based on 2014 market data.

Together, the 9 countries represent 41.7% of the European market, divided as follows:

Austria: 1.8% of the European agency work market/Source InfAction Zeitarbeit-plus

Belgium: 3.6% of the European agency work market/Source Federgon

Denmark: 1.2% of the European agency work market/Source Dansk Erhverv

France: 13.8% of the European agency work market/Source Prism'Emploi

Italy: 5.1% of the European agency work market/Source Ebitemp

Netherlands: 9.1% of the European agency work market/Source ABU

Norway: 1.6% of the European Agency work market / Source NHO

Poland: 0.8% of the European Agency work market / Source Polskie Forum HR

Switzerland: 4.7% of the European Agency work market / Source SwissStaffing

EUROCIETT

As the European Confederation of Private Employment Services, Eurociett is the authoritative voice representing the common interests of the employment and recruitment 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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