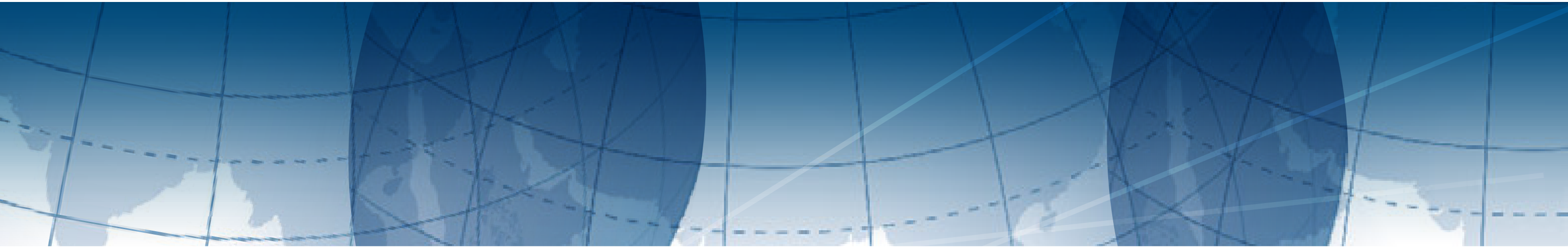
ciett
International Confederation of
Private Employment Agencies

ECONOMIC REPORT



The agency work industry around the world

2012 Edition
(based on figures available for 2010)

The agency work industry around the world

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Introduction

In 2010, the global agency work industry recovered much of the ground lost during the economic downturn that started in the USA in 2007, and quickly spread to the rest of the world. The return to growth was witnessed in many countries, however some reported stronger growth than others. The trends in this report go some way to showing that the openness and the socio-economic fabric of national economies and the flexibility of their labour markets account for the difference across countries.

Overall, the total number of agency workers worldwide was 10.4 million[1]. In parallel, global total annual sales revenues of the agency work industry amounted to €247 billion[2]. 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. This report shows the recovery that the industry made in 2010, but also the continuing trends seen in some countries throughout 2011.

Most markets began to show positive growth in the first quarter of 2010. This trend continued throughout most of 2011, however as the year progressed, the rate of growth witnessed in Europe slowed markedly.

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 global markets continuing to deal with the crisis, 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 career agents for workers, immediately identifying job vacancies, providing training, and facilitating the transition from unemployment to work, from one

1. based on data from 43 countries
2. based on data from 36 countries

assignment to the next. In addition, agency prepared 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 as 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 a better and faster match between supply and demand of labour, by securing upwards transitions for agency workers, and by providing more work opportunities for more people.

Content

The key facts & figures

The players

- There are 128,000 private employment agencies[3] and 176,000 branches[4] worldwide, employing 908,000 internal staff
- In 2010 the total annual sales revenues of the top 10 private employment agencies worldwide accounted for 28% of the total agency work market
- In 2010 the global total annual sales revenues amounted to €247 billion[5]

- The USA is the world leader with 27% of total annual sales. Japan represents 19% of the global agency work market, followed by the UK at 9%
- Europe is the leading regional entity by total annual sales revenues, accounting for 38% of global total annual sales revenues

Agency workers in numbers

- 10.4 million agency workers in full-time equivalents were employed by private employment agencies across the globe in 2010[6]
- The agency work penetration rate is 1.5% in Japan and 1.6% in Europe[7] and 1.8% in the USA
- On average agency workers work around half as many hours as full-time permanent employees[8]
- Most agency work assignments are more than one month long

The profile of agency workers

- On average, 57% of agency workers in Europe are aged less than 30[9] compared with 55% outside Europe[10]
- 77% agency workers have at best finished their secondary education[11]
- Agency workers work in a wide range of sectors represented most strongly in services and manufacturing

Agency work and the economic recovery

- Agency work is a bellwether of the economic situation
- The private employment agency industry has rebounded sharply since the recession but industry growth has slowed

3. based on data from 37 countries
4. based on data from 29 countries
5. based on data from 34 countries
6. based on data from 43 countries
7. based on data from 29 countries. If Russia is included in calculations, penetration rate for Europe would be 1.2%
8. based on data from 29 countries
9. based on data from 17 countries
10. based on data from 9 countries
11. based on data from 19 countries

1. The players

- **There are 128,000 private employment agencies[12] and 176,000 branches[13] worldwide, employing 908,000 internal staff[14]**

- **In 2010 the total annual sales revenues of the top 10 private employment agencies worldwide accounted for 28% of the total agency work market**

- **In 2010 the global total annual sales revenues amounted to €247 billion[15]**

- **The USA is the world leader with 27% of total annual sales. Japan represents 19% of the global agency work market, followed by the UK at 9%**

- **Europe is the leading regional entity by total annual sales revenues, accounting for 38% of global total annual sales revenues**

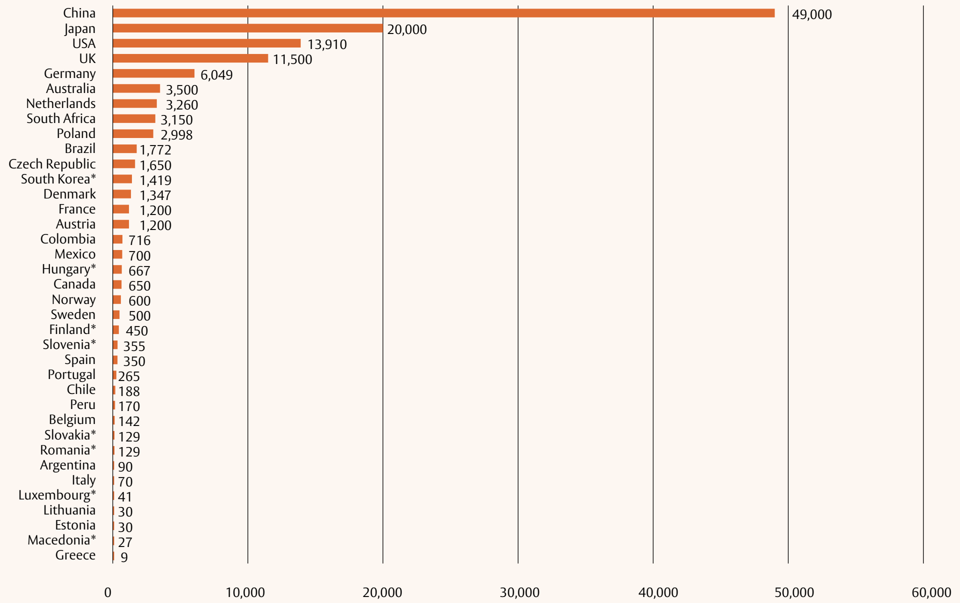
12. based on data from 37 countries
13. based on data from 29 countries
14. based on data from 34 countries
15. based on data from 35 countries

There are 128,000 private employment agencies...

In 2010 there was a recorded 128,000 private employment agencies globally[16]. The Asia/Pacific region accounts for 57% of all private employment agencies (PrEAs). Europe accounts for 26% of all PrEAs, with North America for accounting for 12%. China, Japan and the USA are the top three countries in terms of number of PrEAs, accounting collectively for 65% 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

Number of private employment agencies**



16. Based on data from 37 countries

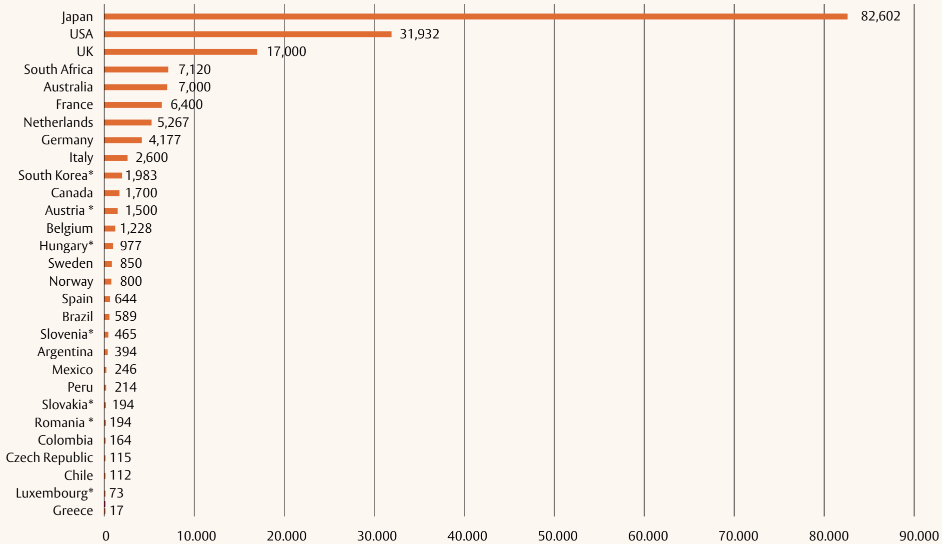
Source: Ciett national federations 2010
*Source: Ciett national federations 2009
**Based on figures from 37 countries

... with 176,000 branches worldwide

In 2010 the total number of PrEA branches was 176,000[17]. The Asia/Pacific region accounting for 52%, Europe for 24%, and North America for 19%. Japan, South Africa and the USA are the top three countries by number of branches, accounting together for 74% of all branches worldwide.

The "branch to PrEA" ratio varies greatly from country to country, from a staggering 37.5 branches per PrEA in Italy to a much smaller ratio in Germany or the UK. 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. This is in contrast to highly fragmented markets, such as Germany or the UK, characterised by a large number of PrEAs, often operating from a single local branch (some Staffing companies operate without any branches, while there is also a number of dormant, non active agencies influencing this number). The global average is 3 branches per PrEA.

Number of branches**



17. Based on data from 29 countries

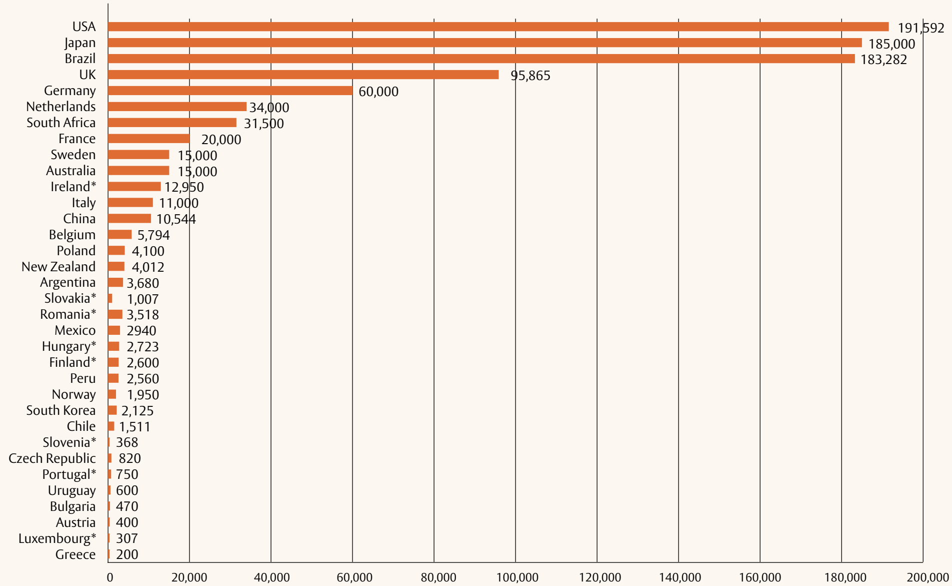
Source: Ciett national federations 2010
*Source: Ciett national federations 2009
**Based on figures from 29 countries

908,000 people were employed as internal staff by PrEAs in 2010

908,000 people were employed as internal staff [HR consultants and back-office people working in branches] by PrEAs in 2010[18]. Europe accounts for 30%, the Asia/Pacific region for 24%, and South America for 21%. The top three countries in terms of internal staff are Japan, Brazil, and the USA, accounting together for 62% of all internal staff worldwide.

The global average is 4 people employed as internal staff per branch, and 10 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.

Number of Internal Staff**



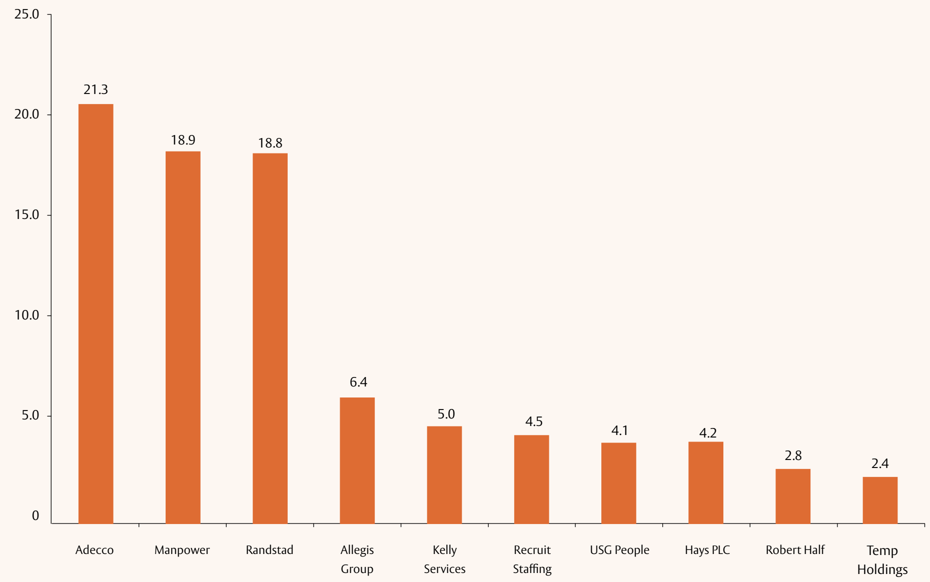
18. Based on data from 34 countries

Source: Ciett national federations 2010
*Source: Ciett national federations 2009
**Based on figures from 34 countries

The top 10 PrEAs worldwide accounted for 28% of global annual sales revenues in 2010[19]

In 2010 the main global players began their recovery from the economic crisis. Adecco, with \$21.3 billion in total annual sales revenues, remains the market leader. Manpower is the second largest PrEA with \$18.9 billion, followed by Randstad with \$18.8 billion. It should be noted that in 2011 Recruit acquired the US and European operations of Advantage Resourcing, making it the 4th largest global staffing firm. In the same year Randstad acquired SFN Group.

Top 10 staffing companies in billions of \$



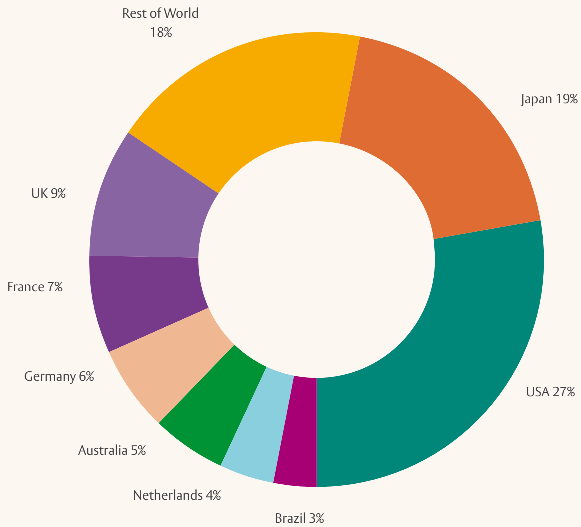
Source: Staffing Industry Analysts 2010 - www.staffingindustry.com
Note: Recruit Staffing bought Advantage Resourcing US and Euopean operations in 2011, thus making Recruit the 4th largest global staffing firm in 2011. Randstad aquired SFN Group in 2011

19. Based on data from 35 countries

In 2010, the USA and Japan are global agency work market leaders by total annual sales revenues

In 2010, the global market for Agency work accounted for 247 billion Euros. The USA is the world leader with 27% of global annual sales. The Japan represents 19% of the global agency work market. The UK remains the third largest market worldwide with 9% of global total annual sales revenues. Europe accounts for 38% of global total annual sales revenues, North America for 29% and Asia/Pacific for 26%.

Percentage of total annual sales revenues in 2010

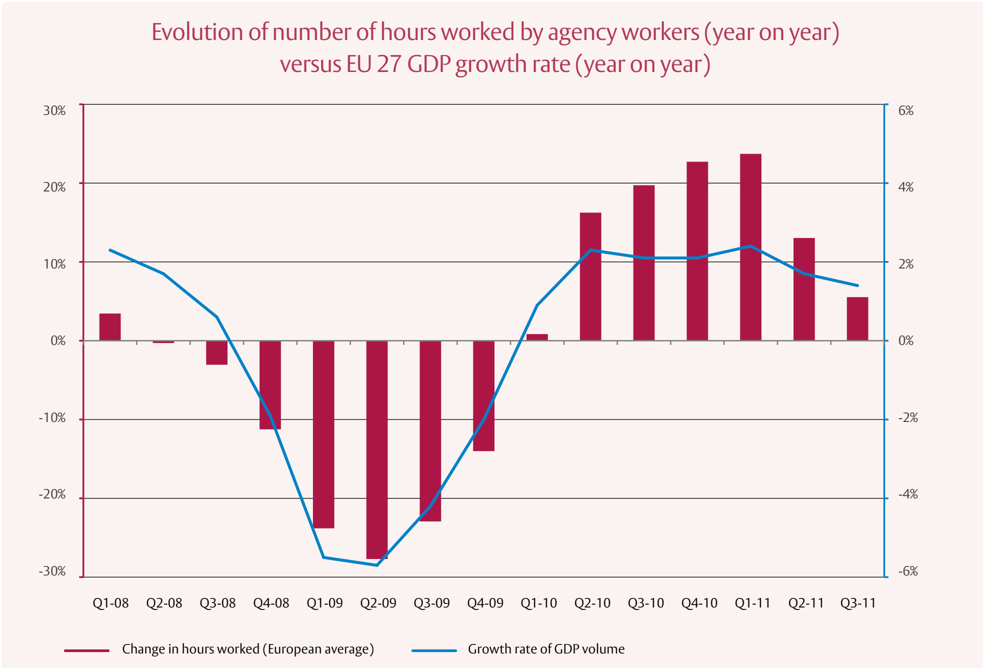


2. Agency work and the economic recovery

- Agency work is a bellwether of the economic situation
- The private employment agency industry has rebounded sharply since the recession but industry growth has slowed

Agency work continues to display a relationship with GDP growth

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.

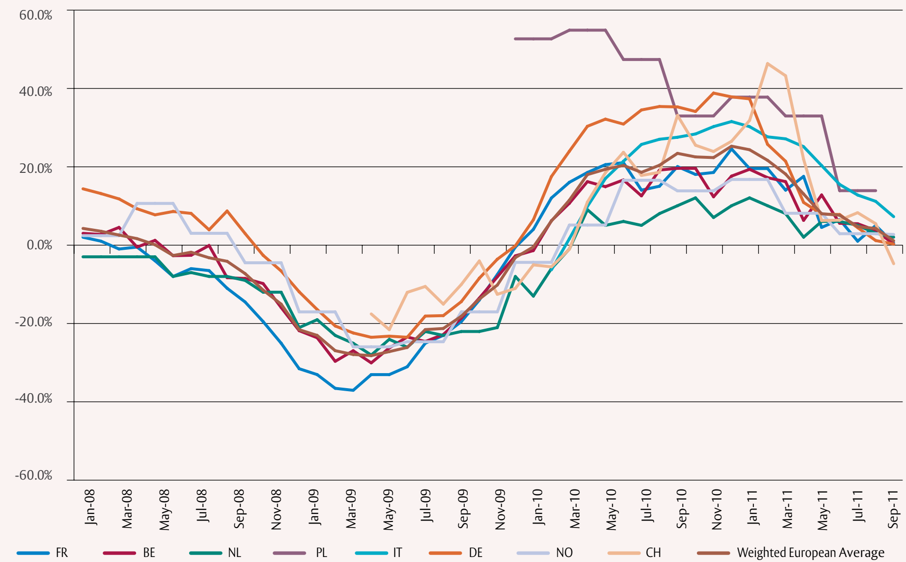


Note: The weighted European Average is the year on year change of agency workers in full-time equivalent employment on a daily basis (except where noted otherwise). The weighted average determined by the surveyed countries share of the European agency work market in 2009. The countries contributing to the weighted European Average account for 58% 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.

The agency work industry in Europe's growth continued throughout 2011

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, a country like Germany which weathered the crisis better than most, can be seen to have surpassed the previous levels of temporary agency work achieved before the beginning of the crisis. Italy has also experienced strong growth throughout 2010 and 2011. Poland is an example of a country where agency work does not have a long history, so its strong year on year growth is somewhat expected as it is coming from quite a low base. Agency work in the Netherlands suffered a smaller dip than in other countries, however its return to growth following the crisis has been at a lower rate than in other countries. Trends for agency work in France and Belgium followed similar patterns with strong growth from mid 2010 through to the same period in 2011 followed by a slowing in the growth of the industry in the third quarter of the year.

Year on year change in the number of hours worked by agency workers



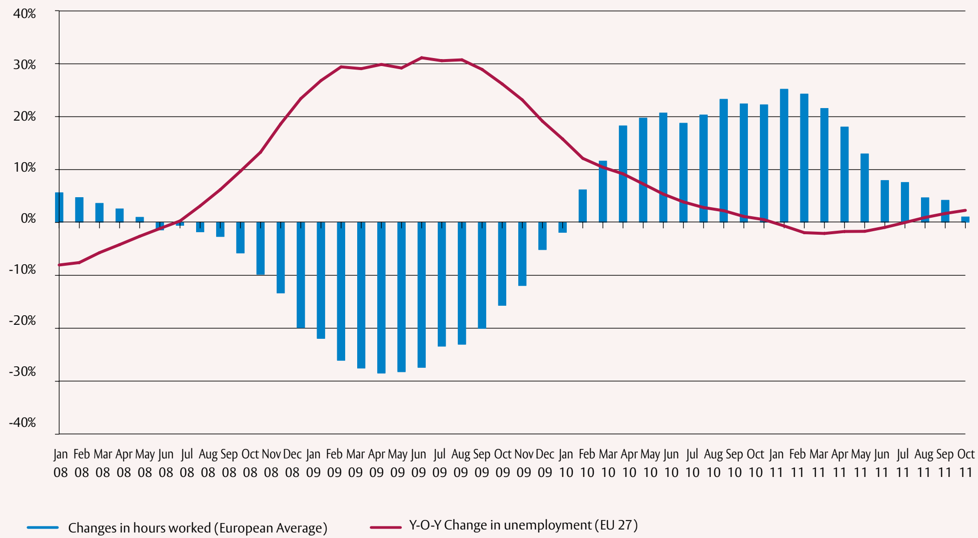
Agency work is a bellweather for the economic environment

In October, EU 27 unemployment levels rose by +2.4% compared with the same period in 2010. At the same time agency work posted a +1.1% rise in hours worked.

From the beginning of the time series in 2008, an inverse relationship between unemployment levels in the EU and the amount of agency work being carried out is on display. Recent months have shown the growth of the agency work industry to have slowed considerably, while at the same time year on year unemployment levels have began to rise again.

Germany's agency work industry began to grow again as early as May 2009 and in July 2010, the German agency work industry returned to pre-crisis levels of employment.

Evolution of the number of hours worked by agency workers (year on year) versus average EU 27 unemployment change (year on year)



This can be partly attributed to Germany obtaining more appropriate regulations later than in other European countries.

The American agency work market began to recover earlier than the industry in Europe

American economic activity measured by employment peaked in December 2007. Since then, it has lost jobs until mid 2009 when it began to grow again. 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. The sustained recovery of the industry points that in the economic recovery, agency workers are among the first to be hired.

US staffing employment index since 2006

3. Agency workers in numbers

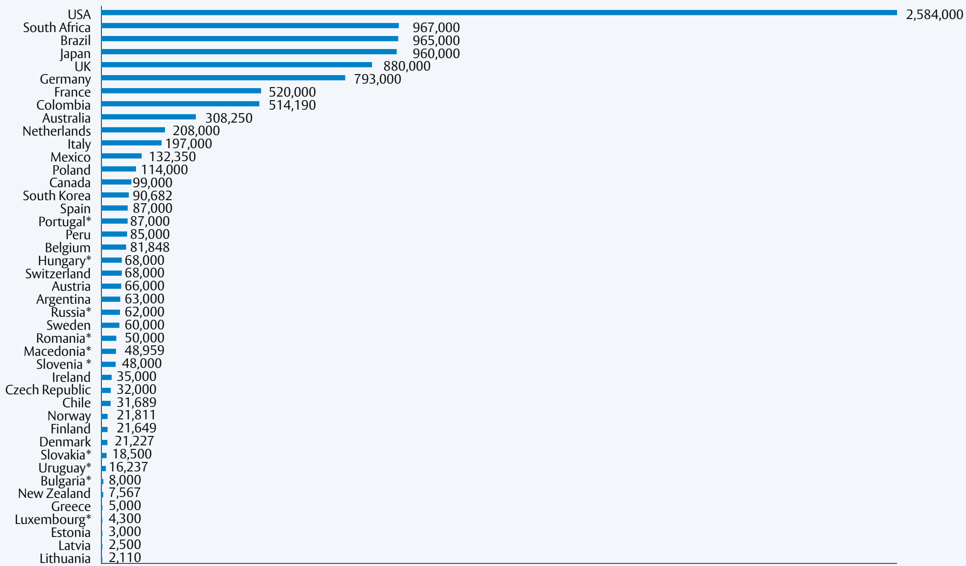
- 10.4 million agency workers in full-time equivalents were employed by private employment agencies across the globe in 2010
- The agency work penetration rate is 1.5% in Japan and 1.6% in Europe and 1.8% in the USA
- On average agency workers work nearly half as much as full-time permanent employees
- Most agency work assignments are more than one month long

10.4 million agency workers were employed daily in 2010[20]

In 2010 the total number of agency workers worldwide amounted to 10.4 million in full-time equivalents[21]. Europe accounts for 35%, North America for 25%, and the Asia/Pacific region for 13%.

The USA employs nearly as many agency workers in full-time equivalents [2.58 million] than the second and third biggest suppliers of agency workers combined. South Africa has the second highest number of agency workers in full-time equivalents [967,000], ahead of Brazil [965,000], Japan [960,000] and the UK [860,000], (UK figures are representative of the 2009/2010 financial year). Together, the USA, South Africa, and Brazil account for 44% of all agency workers assigned worldwide.

Daily average number of agency workers (FTE)



20. based on data from 43 countries
21. ibid

Source: Ciett National Federations
*Source: Ciett estimate
**Based on figures from 43 Countries

Evolution of the number of agency workers in Europe [FTE]

In the last fifteen years, the number of agency workers in Europe has greatly increased, partially as a result of more appropriate regulation being put in place in formerly tightly regulated labour markets, notably in Italy, Germany, and the Nordic countries, and the opening up of new markets in Central and Eastern Europe.

It is important to note that with each passing year the level of information available on the number of agency workers has improved leading to more countries being represented. Care should be taken to only make direct comparisons to previous years where data is available.

Evolution of agency work penetration in Europe

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Austria	0,4%	0,5%	0,6%	0,7%	0,8%	0,9%	0,8%	1,0%w	1,2%	1,2%	1,5%	1,6%	1,6%	1,4%	1,6%
Belgium	1,2%	1,3%	1,6%	1,6%	1,7%	1,7%	1,6%	1,6%	1,8%	1,8%	2,1%	2,2%	2,1%	1,6%	1,9%
Bulgaria	-	-	-	-	-	-	-	-	-	-	-	-	0,1%	0,2%	0,3%*
Czech Republic	-	-	-	-	-	-	-	-	-	-	-	-	0,7%	0,7%	0,7%
Denmark	0,2%	0,2%	0,3%	0,3%	0,3%	0,4%	0,4%	0,4%	0,5%	0,6%	0,7%	0,7%	0,7%	0,7%	0,8%
Estonia														0,5%*	0,5%
Finland	0,4%	0,4%	0,4%	0,3%	0,4%	0,5%	0,4%	0,5%	0,6%	0,7%	0,7%	1,1%	1,3%	0,8%	0,9%
France	1,3%	1,6%	2,0%	2,2%	2,5%	2,5%	2,3%	2,2%	2,3%	2,3%	2,4%	2,5%	2,3%	1,7%	2,0%
Germany	0,5%	0,6%	0,7%	0,7%	0,9%	0,9%	0,9%	0,9%	1,1%	1,2%	1,5%	1,9%	1,9%	1,6%	2,0%
Greece	-	-	-	-	-	-	-	-	-	-	-	0,2%	0,0%	0,1%	0,1%
Hungary	-	-	-	-	-	-	0,8%	1,0%	1,3%	1,4%	1,4%	1,4%	1,4%	1,2%	1,8%*
Ireland	0,2%	0,3%	0,6%	0,6%	1,5%	1,4%	1,4%	1,4%	1,3%	1,3%	1,5%	1,7%	1,7%	0,9%	1,9%
Italy	-	-	0,0%	0,1%	0,3%	0,3%	0,4%	0,6%	0,7%	0,7%	0,8%	1,0%	0,9%	0,7%	0,9%
Latvia														0,2%*	0,3%*
Lithuania														0,2%*	0,2%*
Luxembourg	1,2%	1,2%	1,2%	1,7%	2,2%	2,1%	2,1%	2,1%	2,1%	2,0%	2,5%	2,4%	1,9%	1,9%	1,9%
Macedonia	-	-	-	-	-	-	-	-	-	-	0,4%	0,3%	0,3%	0,8%	0,8%*
Netherlands	2,1%	2,2%	2,4%	2,4%	2,3%	2,2%	2,1%	1,9%	1,9%	2,2%	2,5%	2,8%	2,9%	2,4%	2,5%
Norway	0,3%	0,4%	0,5%	0,5%	0,5%	0,5%	0,5%	0,4%	0,5%	0,6%	1,0%	1,0%	1,0%	0,8%	0,9%
Poland	-	-	-	-	-	-	-	0,1%	0,2%	0,2%	0,2%	0,4%	0,5%	0,5%	0,7%
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%	1,6%**	1,6%**	1,7%*
Romania	-	-	-	-	-	-	-	-	-	-	-	-	0,3%	0,3%	0,5%
Russia														0,1%"	0,1%"
Slovakia	-	-	-	-	-	-	-	-	-	-	-	-	0,6%	0,6%	0,8%*
Slovenia	-	-	-	-	-	-	-	-	-	-	-	-	0,3%	0,3%	0,5%*
Spain	0,5%	0,7%	0,8%	0,9%	0,7%	0,7%	0,6%	0,6%	0,7%	0,7%	0,7%	0,8%	0,6%	0,4%	0,5%
Sweden	0,2%	0,3%	0,4%	0,6%	1,0%	0,9%	0,8%	0,7%	0,7%	0,7%	0,8%	1,3%	1,3%	1,0%	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%	1,4%	1,6%
UK	2,6%	2,9%	2,6%	2,8%	3,7%	3,7%	3,7%	3,9%	4,1%	4,2%	4,3%	4,7%	4,1%	3,7%	3,0%

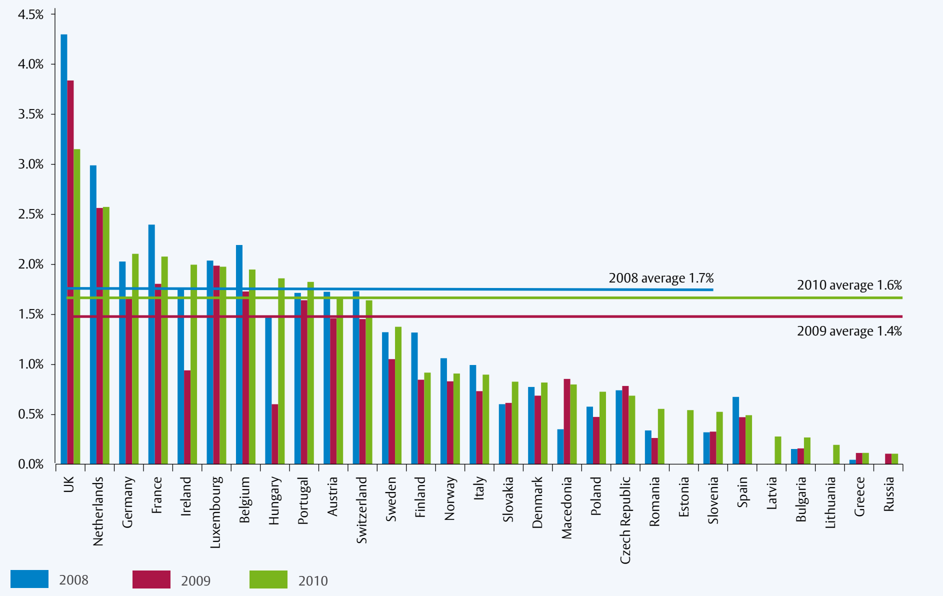
* Denotes Ciett estimate based on the overall evolution of comparable markets between 2009 and 2010 of 8.52%
**Denotes Eurostat estimate (Nace code 78.2)

Source: Ciett national federations
*Source: Ciett estimate
**Source: Eurostat (Nace Code 78.2)

Agency work nears its 2008 high in 2010 throughout Europe

Across Europe, the penetration rate for agency work rose. Germany with a penetration rate of 2% and Sweden with 1.3% are notable for having reached all time highs for agency work penetration. The fall in penetration rate in the UK to 3.0% can be attributed data there referring to the financial year of 2009/2010 rather than 2010 as the other countries are reporting. The average penetration rate in Europe was 1.6% in 2010[22], up from 1.4% in 2009[23] but still a little short of the 2008 average of 1.7%[24]. Nevertheless, this average hides enormous differences from country to country, ranging from 3.0% in the UK to 0.1% in Greece. Mature markets in Western Europe, namely the UK, France, Germany and the Benelux countries, are all above average; whereas the markets in Southern and Eastern Europe are all below average.

Comparative penetration rate 2008-2010



22. based on data from 29 countries
23. based on data from 29 countries
24. based on data from 27 countries

Note: estimate for Russia not used in calculating European Average. If included, penetration rate in 2010 would be 1.2%

Evolution of the number of agency workers in the rest of the world [FTE]

Outside Europe the number of agency workers has also markedly increased between 1996 and 2010, 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.

It is important to note that with each passing year the level of information available on the number of agency workers has improved leading to more countries being represented. Care should be taken to only make direct comparisons to previous years where data is available.

Evolution of Agency work in the Rest of the World

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Argentina**	0,3%	0,3%	0,3%	0,3%	0,3%	0,3%	0,2%	0,3%	0,4%	0,4%	0,4%	0,4%	0,4%	0,3%	0,4%
Australia	-	-	-	-	-	-	-	-	-	-	-	-	-	2,8%	2,7%
Brazil	-	-	-	-	-	-	-	-	-	-	0,9%	1,0%	0,9%	1,0%	1,0%
Chile	-	-	-	-	-	-	-	-	-	-	1,3%	0,5%	0,4%	0,4%	0,4%
Colombia	-	-	-	-	-	-	-	-	-	-	-	-	-	3,3%	2,7%
Japan	0,5%	0,5%	0,5%	0,6%	0,8%	1,0%	1,1%	1,2%	1,4%	1,7%	1,9%	2,1%	2,2%	1,8%	1,5%
Mexico	-	-	-	-	-	-	-	-	-	-	-	-	-	0,1%	0,3%
New Zealand	-	-	-	-	-	-	-	-	-	0,5%	0,5%	0,4%	0,6%	0,6%	0,3%
Peru	-	-	-	-	-	-	-	-	-	-	-	-	-	0,3%	0,6%
South Africa*	-	-	-	-	-	-	-	-	-	2,3%	2,2%	2,1%	3,4%	6,4%	7,1%
South Korea	-	-	-	-	-	-	-	-	0,2%	0,3%	0,3%	0,3%	0,3%	0,4%	0,4%*
USA**	1,9%	2,1%	2,1%	2,2%	2,2%	1,9%	1,8%	1,9%	2,1%	2,2%	2,1%	2,0%	1,8%	1,5%	1,8%

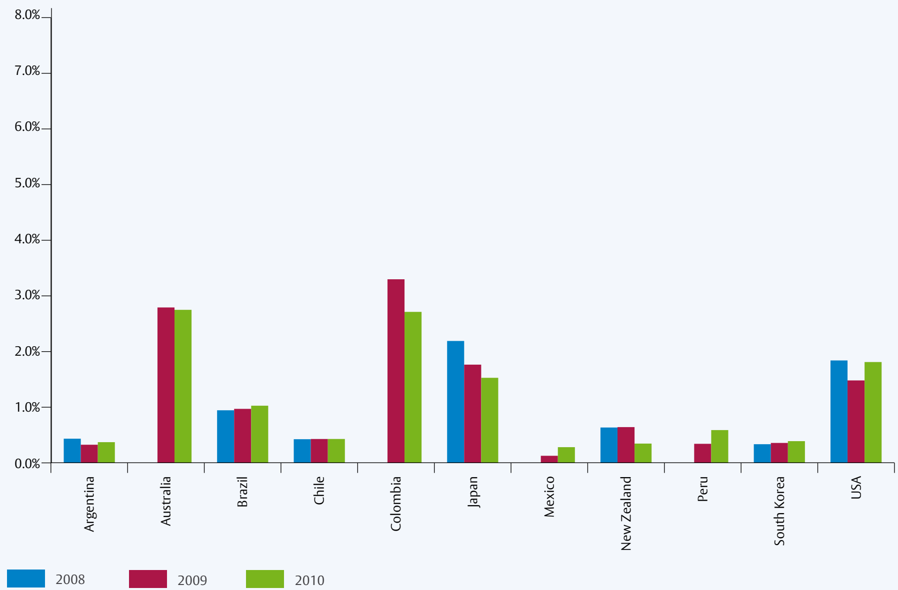
Denotes Ciett estimate based on the overall evolution of comparable markets between 2009 and 2010 of 8.52%

Source: Ciett National Federations
*Source: Ciett Estimate
**Time series revised compared to previous editions
***Change of methodology in 2009 for calculating FTE workers

Outside Europe agency work penetration rates vary widely

Agency work penetration rates are determined in part 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%[25] 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.

Evolution of penetration rate 2008-2010



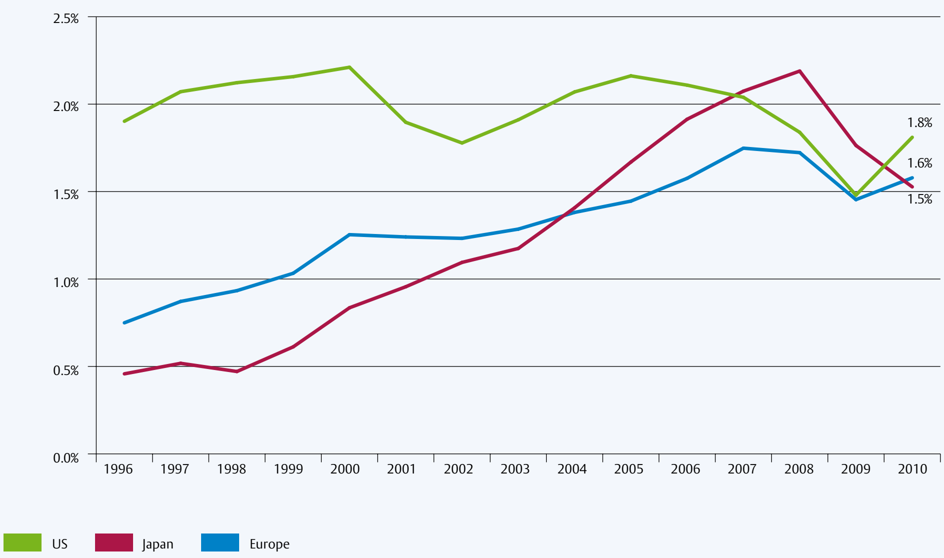
25. based on data from 6 countries

Note: estimate for Russia not used in calculating European Average. If included, penetration rate in 2010 would be 1.2%

USA has the highest penetration rate of major markets

In Europe, the appropriateness of regulation and degree of economic development explain the differences in pace of growth of the agency work industry. In 2010 the penetration rate for agency work stood at 1.6%[26] in Europe. The penetration rate for Agency work in the USA bounced back stronger than eirher Japan or Europe, reaching 1.8% in 2010. Stricter regulation was imposed in Japan which led to the agency work industry dipping below that seen in the other major markets. For Europe, it is important to note that with each passing year a greater number of Ciett national federations report on the number of agency workers. this relates to agency work becoming a significant form of employment in these countries. See page 25 for additional information.

Comparison of european, Japanese and USA penetration rates.



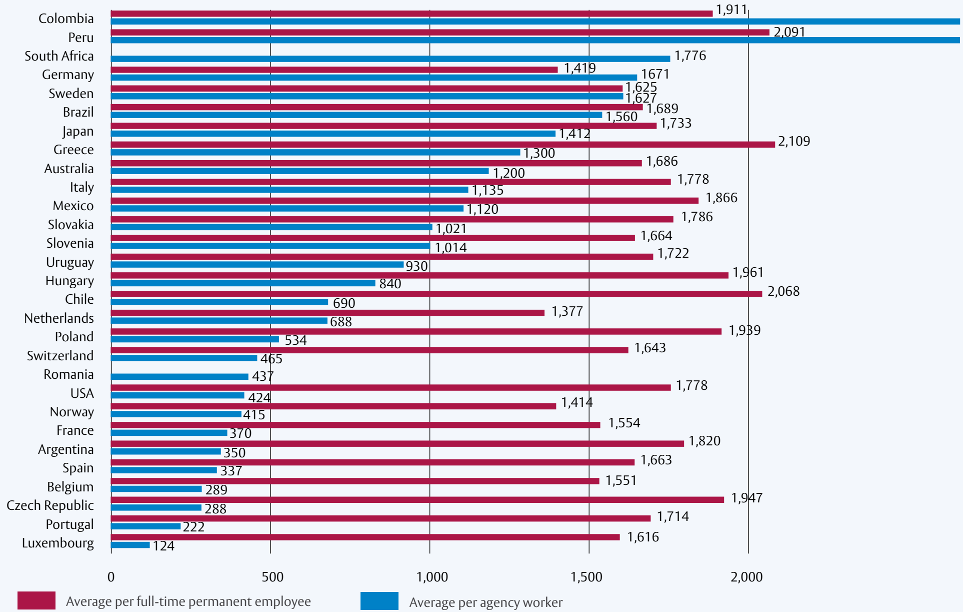
Note: European average calculated using data from available countries

26. 2010 data based on information from 29 countries

Agency workers half as many hours as full-time permanent employees

Agency workers tend to work fewer hours during one year than a worker with a full-time, open-ended contract – with the the notable exceptions of Colombia, Peru, Germany and 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 8% in Luxembourg to 141% in Colombia. It should be kept in mind that the average working hours reflects a diversity of situations and profiles of agency workers. For instance, sutdents typically work for short periods of time during school holidays, therefore lowering the average to a large extent.

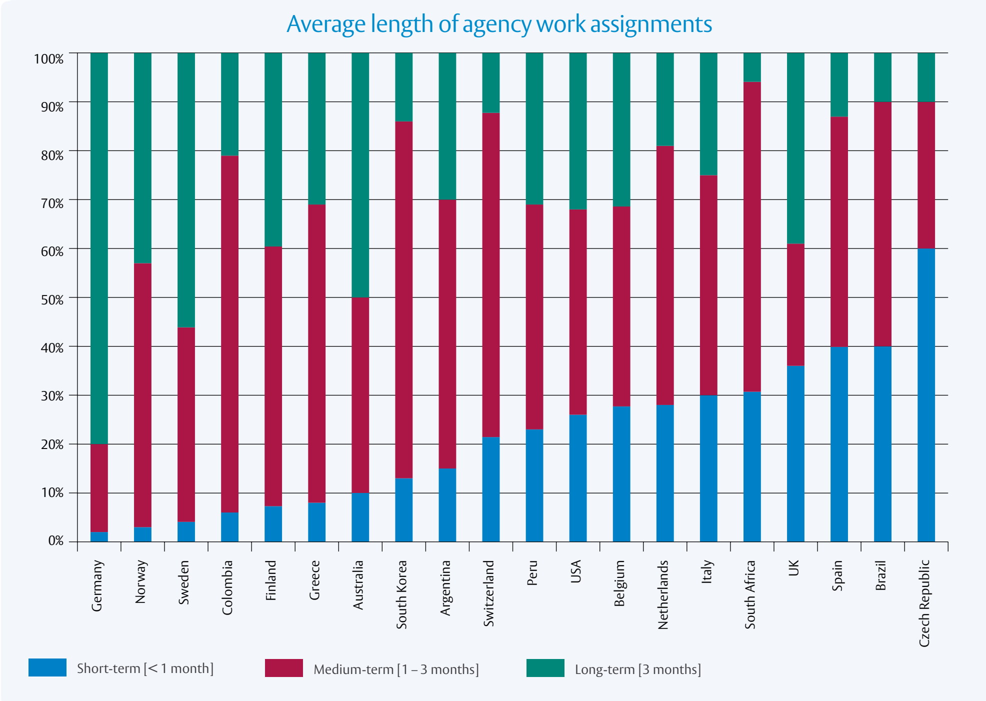
Average number of hours worked *



* By an individual during one year
Sources : Ciett National Federations, , ILO Kilm 7th edition

Most agency work assignments are more than one month long

In most countries, the average length of assignment of an agency worker exceeds one month, and often even exceeds three, the notable exceptions being France [82%] and Spain [63%], where more than half of the assignments are less than one month long. Only 7% of assignments in Peru and 4% in Sweden last for less than a month.



4. The profile of agency workers

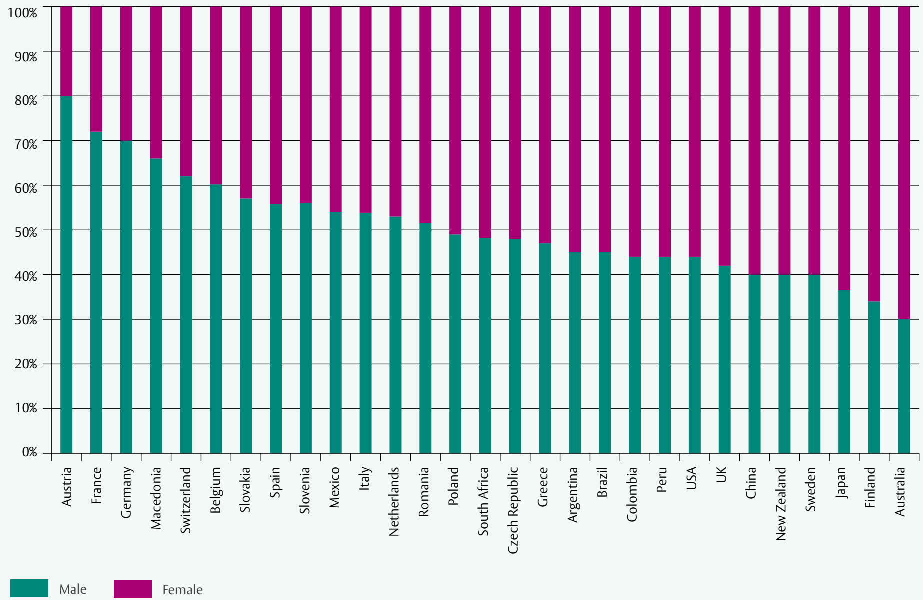
- Differences in gender balance depend on the socio-economic fabric of a country.
- 57% of agency workers are aged less than 30 in Europe
- Agency workers outside Europe tend to be older
- 77% agency workers have at best finished their secondary education
- Agency workers work in a wide range of sectors represented most strongly in services and manufacturing

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 Sweden [60% of women and 57% in the services sector], whereas markets with a strong industrial history usually employ more men, such as Germany [70% of men and 48% in the manufacturing sector].

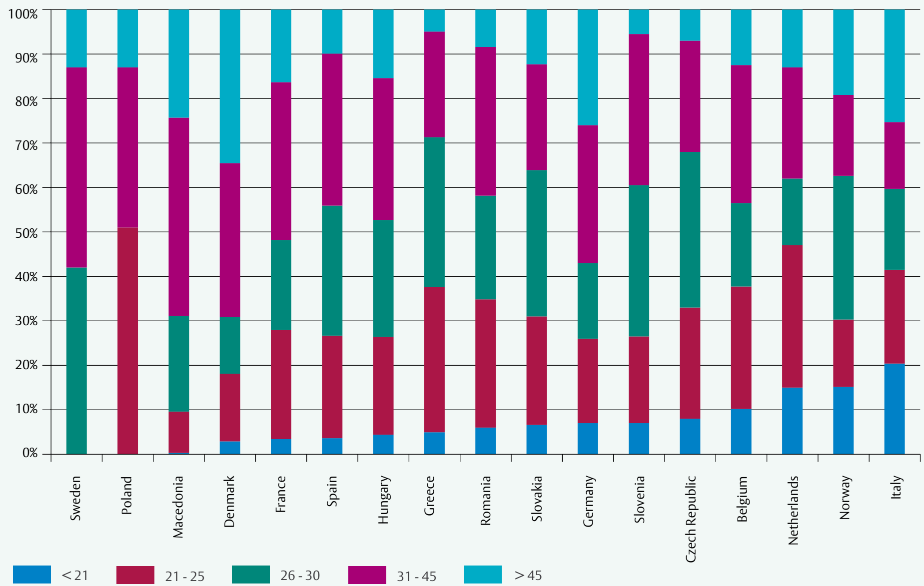
Gender balance of agency workers



Most agency workers in Europe are aged below 30

Young people make up a high proportion of agency workers compared to the total active working population with a majority of agency workers being over 30 years of age. On average, 10% of agency workers are under 21 years old with 22% are between 21 and 25 years old. A further 25% are between 25 and 30 Years old. This means that on average, 57% of agency workers are under 30 years old. 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. Notable exceptions to this trend are Denmark [70% over 30], and Macedonia [69% over 30].

Average age of agency workers in Europe

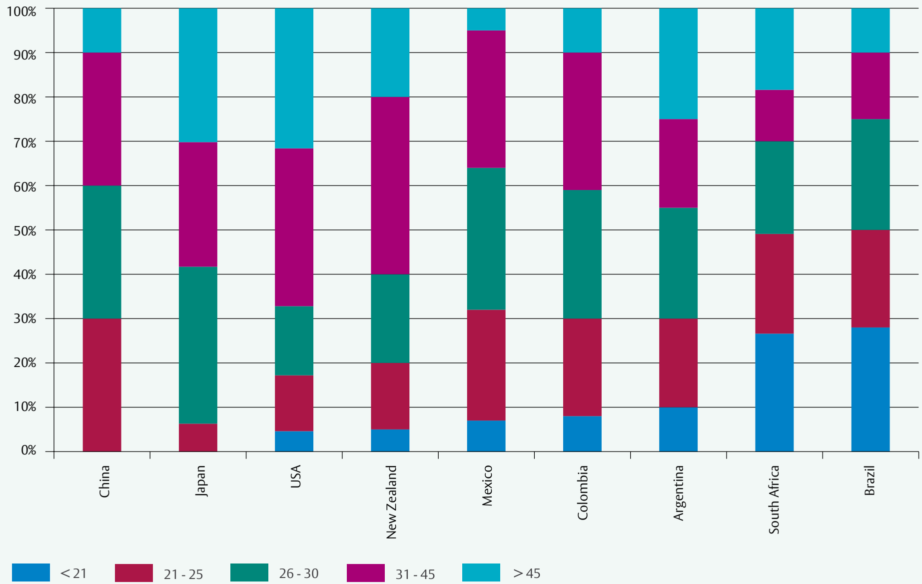


Agency workers tend to be older outside Europe

Agency workers tend to be older in Japan, where 58% of agency workers are over 30 and in the US, where 68% of Agency workers are aged 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.

Average age of agency workers in the rest of the world



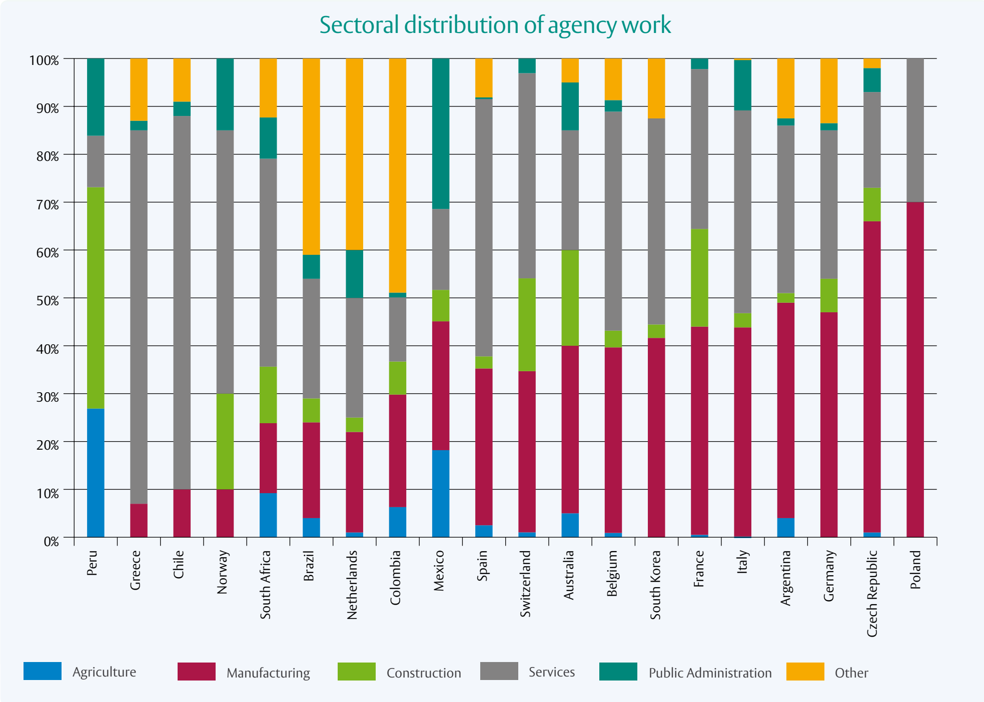
More than a quarter of agency workers have completed higher education

On average, 27% of agency workers have completed higher education. In Sweden and Australia, more than half of agency workers have completed higher education. In most countries, the majority of agency workers have a low to medium initial education level. On average, 50% of agency workers worldwide have finished secondary school, and 23% have not. The Czech Republic [60%] is the only country to report the majority of agency workers having 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.

Education level of agency workers

Sectoral distribution of agency work

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 [31% average], towards a growing use in the services sector [37% average]. Manufacturing remains an important user of agency work in traditionally industrial economies, such as Poland [70%] and Czech Republic [65%]. Mexico [29%], Norway [15%] and Peru [15%], make important use of agency work in public administration, as do Peru [43%] and France [23%] in the construction sector. More than three in four Chilean agency workers work in the services sector, and 45% of Argentinian agency workers work in the manufacturing sector.



b. Diversity

The number of agency workers over 50 is increasing in Italy

Workers over 50 are under-represented in the Italian agency work population. However, their numbers are continually on the rise. In 2004, 2006, 2008 and 2010, the proportion of agency workers aged over 50 has steadily increased from 3% to 4% to 5% to 6%.

"Agency work offers groups such as migrant workers, women returning from childcare breaks, disabled and unemployed people across to the labour market. In principle, agency work can help workers develop their skills and experience, thereby offering pathways into more secure employment."

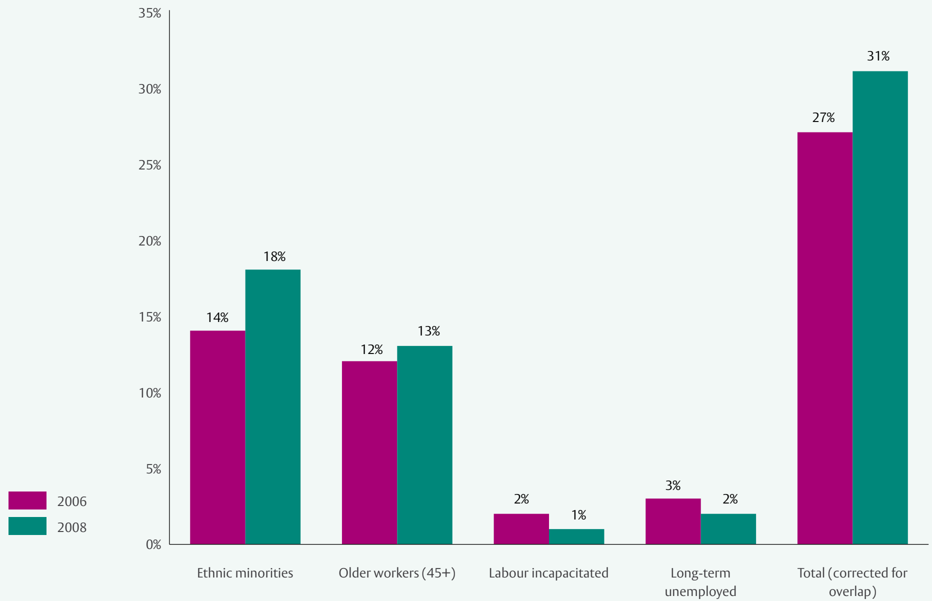
Source: Eurofound - Temporary Agency Work and Collective Bargaining in the EU | 2009

Percentage of agency workers over 50 in Italy

Agency workers from target groups are on the rise in the Netherlands

Agency work gives target groups a viable access to the labour market, thereby increasing labour market participation and diversity. Ethnic minorities, older people, labour incapacitated and the long term unemployed accounted for 31% of agency workers in the Netherlands in 2008. This is up from 27% in 2006. 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.

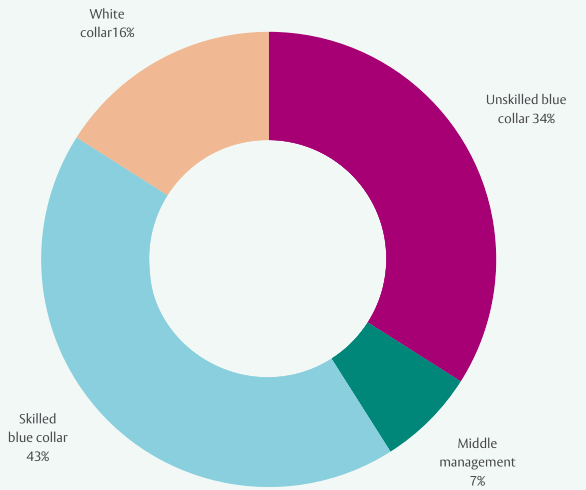
The percentage of special target groups among temporary employees in the Netherlands



Disabled temporary agency workers take on a range of positions

In France, 43% of disabled workers are classified as skilled blue collar workers, while 7% occupy middle management positions. 16% are white collar employees and 34% are unskilled blue collar workers. Through private employment agencies, disabled agency workers are integrated at every level of companies.

Employment of disabled agency workers in France



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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 47 national federations of private employment agencies and six of the largest staffing companies worldwide: Adecco, GI Group, Kelly Services, Manpower, Randstad, 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 6 regional organisations: Africa & Near East, Northern and Southern Asia, North America, South America [CLETT&A], and Europe [Eurociett].

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