

# Q4/2010

## Manpower Employment Outlook Survey Poland

A Manpower Research Report



Manpower®

# Q4/10

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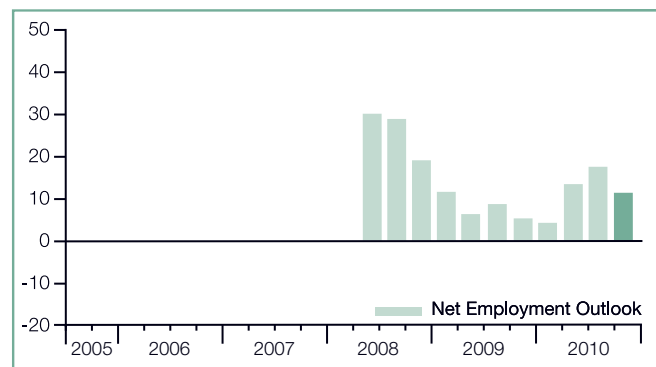
# Poland Employment Outlook

The Manpower Employment Outlook Survey for the fourth quarter 2010 was conducted by interviewing a representative sample of 750 employers in Poland. All survey participants were asked, *“How do you anticipate total employment at your location to change in the three months to the end of December 2010 as compared to the current quarter?”*

Polish employers forecast an upbeat hiring pace in Quarter 4 2010. With 19% of employers anticipating an increase in headcount, 8% predicting a decrease and 71% expecting no change, the Net Employment Outlook stands at a hopeful +11%.

Quarter-over-quarter, employers report a moderate decline of 7 percentage points in the Outlook, but year-over-year, hiring prospects have improved by 6 percentage points.

Throughout this report, we use the term “Net Employment Outlook.” This figure is derived by taking the percentage of employers anticipating total employment to increase and subtracting from this the percentage expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook.



	Increase	Decrease	No Change	Don't Know	Net Employment Outlook
	%	%	%	%	%
<b>Q4 2010</b>	<b>19</b>	<b>8</b>	<b>71</b>	<b>2</b>	<b>11</b>
Q3 2010	24	6	68	2	18
Q2 2010	20	7	71	2	13
Q1 2010	15	11	71	3	4
Q4 2009	15	10	72	3	5

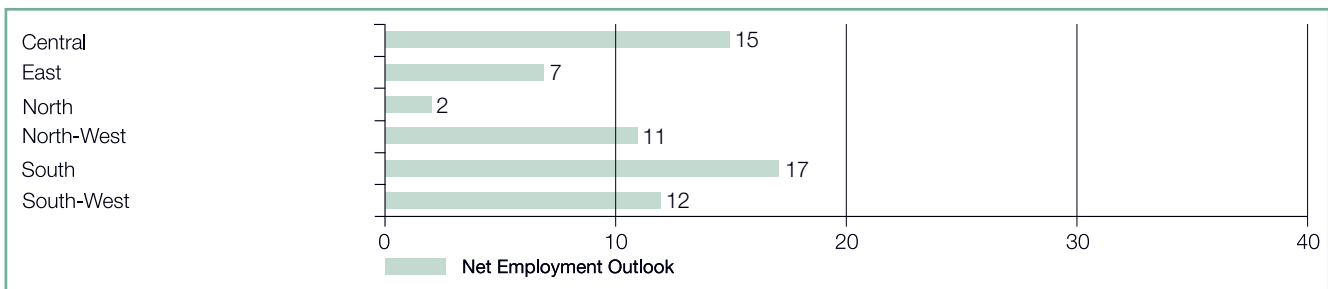
## Regional Comparisons

Employers in all six regions expect positive headcount growth during Quarter 4 2010. The most upbeat hiring pace is forecast in the South, where the Net Employment Outlook stands at +17%. Central employers also predict a steady hiring pace, with an Outlook of +15%, and South-West employers report a respectable Outlook of +12%. The most conservative labor market is predicted by employers in the North, who report an Outlook of +2%.

Quarter-over-quarter, hiring plans have weakened in all but one region. In the North-West, employers report a

considerable decline of 14 percentage points in the Outlook, and decreases of 11 percentage points are reported in the East, the North and the South-West.

When compared to Quarter 4 2009, however, hiring plans are stronger in all six regions. The most notable improvement of 11 percentage points is reported by employers in the South, while in the South-West, employers report a moderate improvement of 7 percentage points.



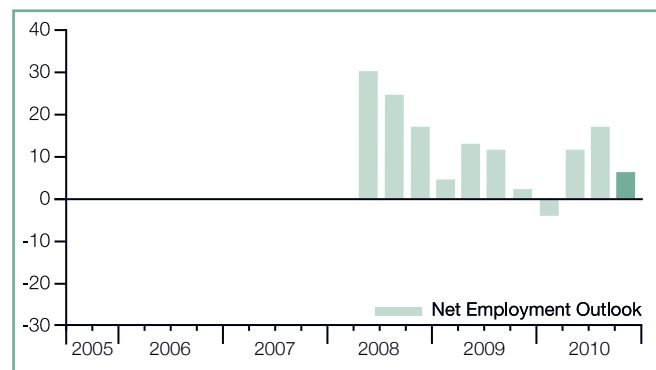
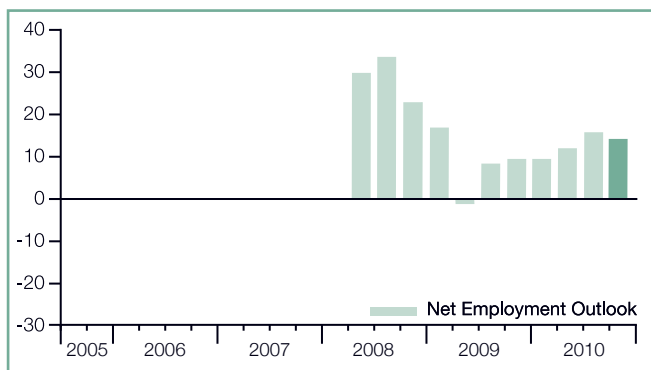
\* Regions of Poland according to Eurostat: Central (łódzkie, mazowieckie), East (lubelskie, podkarpackie, świętokrzyskie, podlaskie), North (kujawsko-pomorskie, warmińsko-mazurskie, pomorskie), North-West (wielkopolskie, zachodniopomorskie, lubuskie), South (małopolskie, śląskie), South-West (dolnośląskie, opolskie).

### Central +15%

With a Net Employment Outlook of +15%, employers anticipate a steady hiring pace in the coming quarter. The Outlook remains relatively stable quarter-over-quarter, and employers report a moderate improvement of 5 percentage points year-over-year.

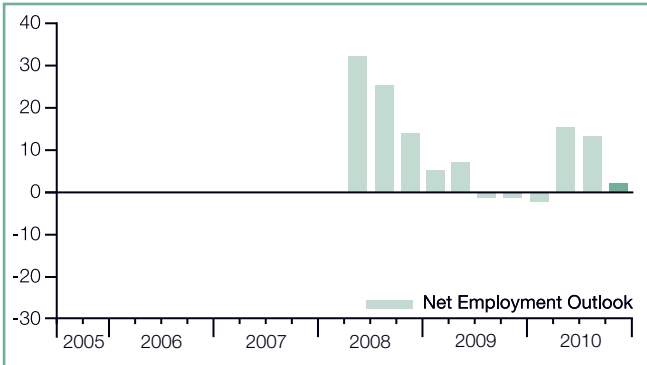
### East +7%

Employers forecast some opportunities for job seekers in Quarter 4 2010, reporting a moderate Net Employment Outlook of +7%. While the Outlook declines by a considerable margin of 11 percentage points quarter-over-quarter, it improves by 5 percentage points year-over-year.



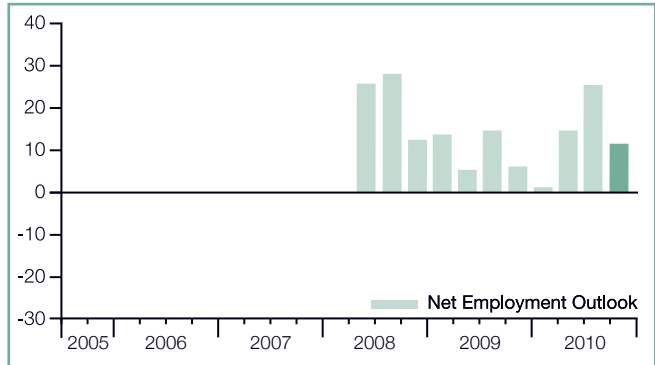
## North +2%

Job seekers in the North face an uncertain hiring climate in Quarter 4 2010, according to employers, who report a cautious Net Employment Outlook of +2%. Quarter-over-quarter, employers report a considerable decline of 11 percentage points in the Outlook, but year-over-year it improves by 3 percentage points.



## North-West +11%

Employers anticipate a steady hiring pace in the region during Quarter 4 2010. They report a Net Employment Outlook of +11%, and while hiring prospects have declined considerably by 14 percentage points compared to the previous quarter, the Outlook is 5 percentage points stronger year-over-year.



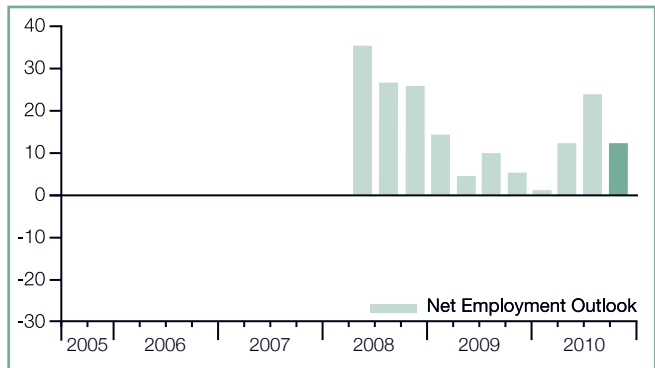
## South +17%

Employers in the South report favorable hiring plans for Quarter 4 2010, with a Net Employment Outlook of +17%. The Outlook remains unchanged quarter-over-quarter and improves by a considerable margin of 11 percentage points year-over-year.



## South-West +12%

With a Net Employment Outlook of +12%, employers anticipate an upbeat hiring pace in Quarter 4 2010. While hiring prospects have weakened by 11 percentage points quarter-over-quarter, the Outlook is 7 percentage points stronger year-over-year.



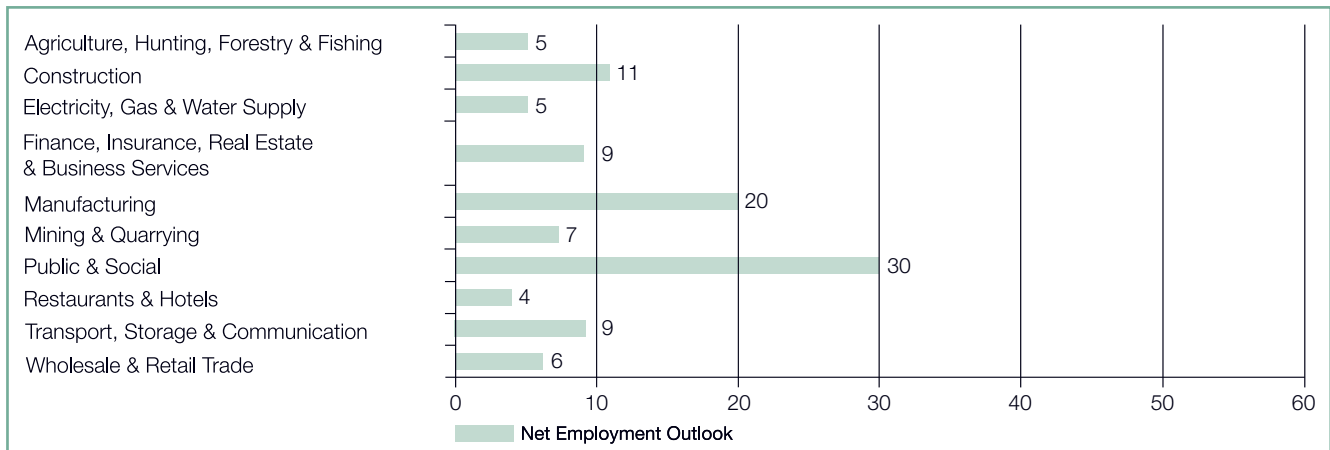
## Sector Comparisons

Employers in all 10 industry sectors forecast positive headcount growth in Quarter 4 2010. An active hiring pace is anticipated in the Public & Social sector, where employers report a Net Employment Outlook of +30%, and job seekers in the Manufacturing sector are expected to enjoy a positive hiring climate, with employers reporting an Outlook of +20%. Steady headcount growth is also expected in the Construction sector, where the Outlook is +11%. The most cautious hiring intentions are reported in the Restaurants & Hotels sector, where the Outlook is +4%.

Quarter-over-quarter, employers in seven industry sectors report weaker hiring plans. The sharpest decline of 33 percentage points is reported in the Outlook

for the Construction sector, and considerable decreases of 20 and 16 percentage points are reported for the Restaurants & Hotels sector and the Mining & Quarrying sector, respectively. Meanwhile, Public & Social sector employers report a moderate improvement in the Outlook of 7 percentage points, and Manufacturing sector employers report a slight increase of 3 percentage points.

When compared with Quarter 4 2009, employers in four industry sectors report stronger hiring intentions. The most notable improvement of 29 percentage points is reported in the Manufacturing sector, and the Public & Social sector Outlook improves by 20 percentage points. Employers in three sectors report weaker hiring intentions, including the Mining & Quarrying sector, where the Outlook declines by 4 percentage points.

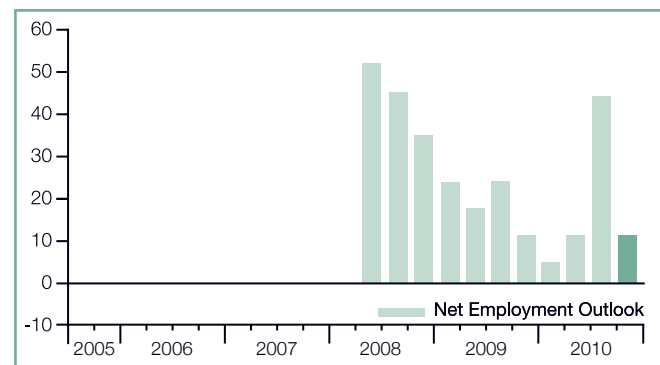
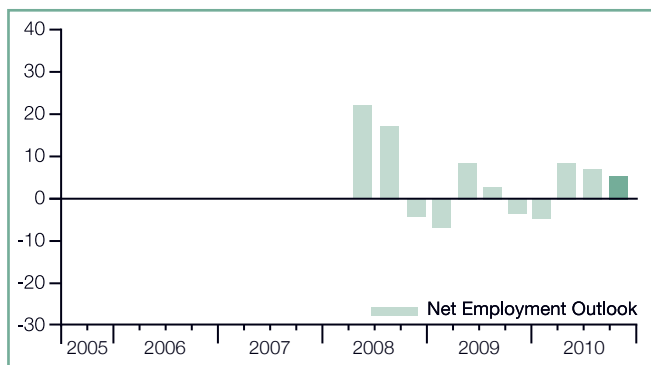


### Agriculture, Hunting, Forestry & Fishing +5%

With a Net Employment Outlook of +5%, sector employers anticipate modest headcount growth in Quarter 4 2010. While this reflects a slight decline of 2 percentage points in the Outlook compared with the previous quarter, year-over-year hiring prospects have improved by 9 percentage points.

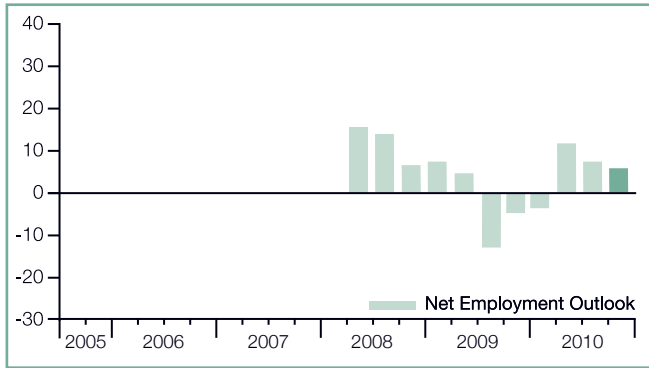
### Construction +11%

Employers forecast a steady hiring pace in Quarter 4 2010, reporting a Net Employment Outlook of +11%. Quarter-over-quarter, hiring intentions sharply decline by 33 percentage points, but year-over-year the Outlook remains unchanged.



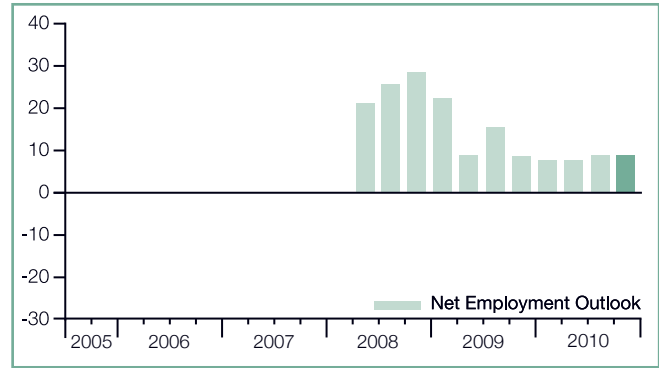
## Electricity, Gas & Water Supply +5%

Employers anticipate some headcount gains during Quarter 4 2010, reporting a Net Employment Outlook of +5%. Quarter-over-quarter, the Outlook declines by 2 percentage points, but year-over-year employers report a considerable improvement of 10 percentage points.



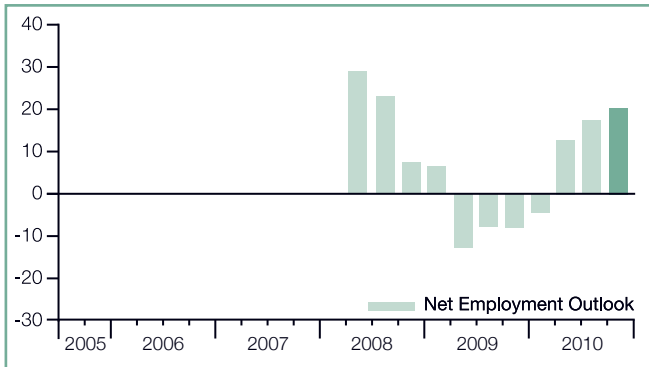
## Finance, Insurance, Real Estate & Business Services +9%

Employers report cautiously optimistic hiring plans for the upcoming quarter, with a Net Employment Outlook of +9%. Hiring prospects remain unchanged both quarter-over-quarter and year-over-year.



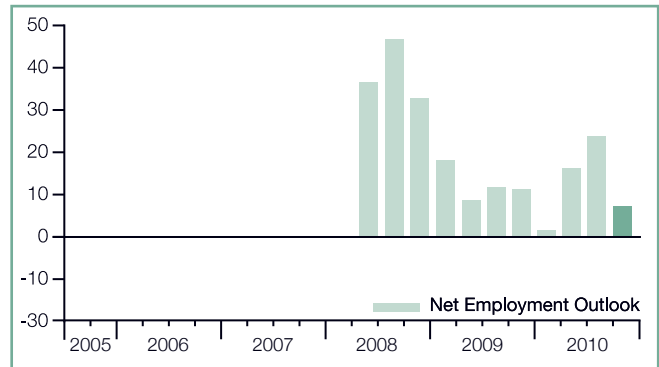
## Manufacturing +20%

Employers anticipate an upbeat hiring pace in Quarter 4 2010, reporting a favorable Net Employment Outlook of +20%. The Outlook is stronger than at any point since Quarter 3 2008, having improved by 3 percentage points quarter-over-quarter and by 29 percentage points year-over-year.



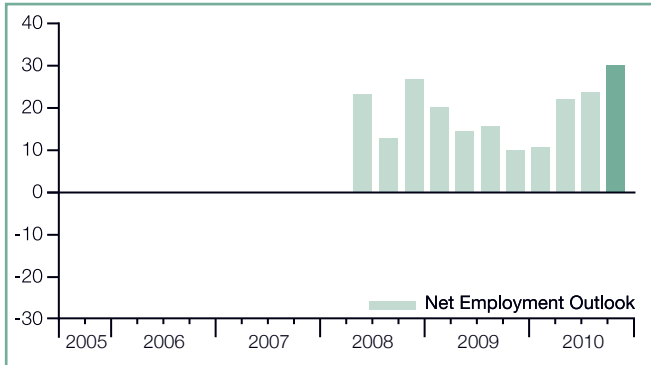
## Mining & Quarrying +7%

Employers anticipate some opportunities for job seekers in Quarter 4 2010, reporting a modest Net Employment Outlook of +7%. However, hiring plans have weakened both quarter-over-quarter and year-over-year, with the Outlook declining by 16 and 4 percentage points, respectively.



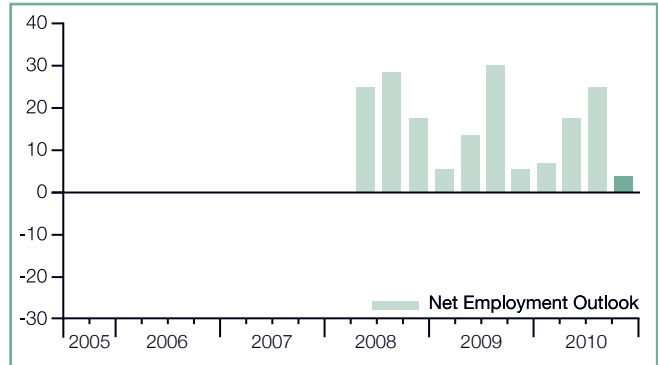
**Public & Social +30%**

Sector employers report the strongest hiring prospects since the survey began in Quarter 2 2008, with a Net Employment Outlook of +30%. The Outlook improves by 7 percentage points quarter-over-quarter and by a considerable margin of 20 percentage points year-over-year.



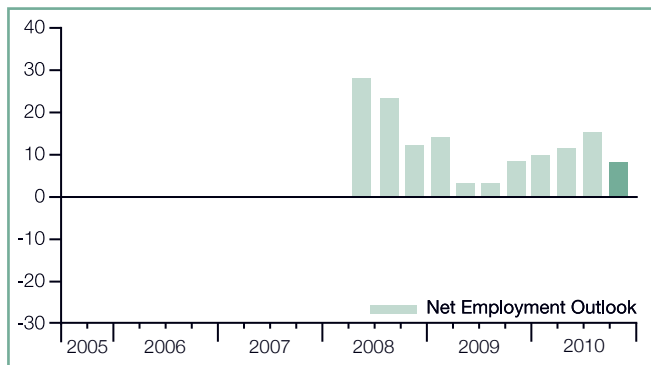
**Restaurants & Hotels +4%**

With a Net Employment Outlook of +4%, employers forecast slow-paced headcount growth in Quarter 4 2010. The Outlook is weaker than at any point since the survey began in Quarter 2 2008, declining by 20 percentage points when compared with the previous quarter. Year-over-year, the Outlook remains relatively stable.



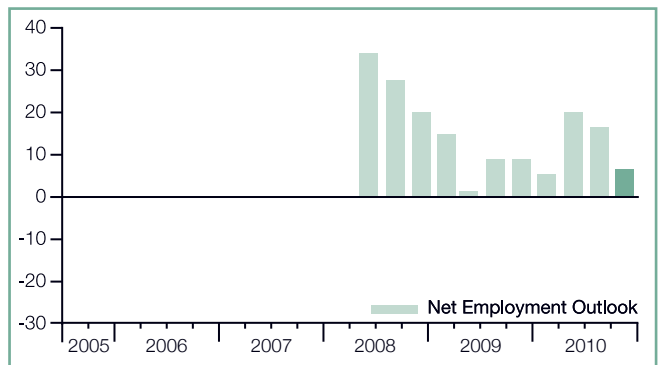
**Transport, Storage & Communication +9%**

Employers report cautiously optimistic hiring plans for Quarter 4 2010, with a Net Employment Outlook of +9%. The Outlook declines by 6 percentage points quarter-over-quarter, but remains unchanged year-over-year.



**Wholesale & Retail Trade +6%**

Employers expect some headcount gains in the forthcoming quarter, reporting a Net Employment Outlook of +6%, but hiring plans have weakened both quarter-over-quarter and year-over-year, by 11 and 3 percentage points, respectively.





# Global Employment Outlook

Americas	Net Employment Outlook			Qtr on Qtr Change	Yr on Yr Change
	Quarter 4 2009	Quarter 3 2010	Quarter 4 2010	Q4 2010 to Q3 2010	Q4 2010 to Q4 2009
	%	%	%		
Argentina	3	11	17	6	14
Brazil	21	40	37	-3	16
Canada	4 (5) <sup>1</sup>	16 (11) <sup>1</sup>	14 (15) <sup>1</sup>	-2 (4) <sup>1</sup>	10 (10) <sup>1</sup>
Colombia	13	16	17	1	4
Costa Rica	6 (4) <sup>1</sup>	18 (22) <sup>1</sup>	23 (21) <sup>1</sup>	5 (-1) <sup>1</sup>	17 (17) <sup>1</sup>
Guatemala	1	10	9	-1	8
Mexico	4 (4) <sup>1</sup>	17 (16) <sup>1</sup>	16 (17) <sup>1</sup>	-1 (1) <sup>1</sup>	12 (13) <sup>1</sup>
Panama	-	16	19	3	-
Peru	9 (11) <sup>1</sup>	24 (25) <sup>1</sup>	23 (29) <sup>1</sup>	-1 (4) <sup>1</sup>	14 (18) <sup>1</sup>
United States	-2 (-1) <sup>1</sup>	10 (6) <sup>1</sup>	4 (5) <sup>1</sup>	-6 (-1) <sup>1</sup>	6 (6) <sup>1</sup>

Asia Pacific	Net Employment Outlook			Qtr on Qtr Change	Yr on Yr Change
	Quarter 4 2009	Quarter 3 2010	Quarter 4 2010	Q4 2010 to Q3 2010	Q4 2010 to Q4 2009
	%	%	%		
Australia	9 (8) <sup>1</sup>	21 (24) <sup>1</sup>	20 (19) <sup>1</sup>	-1 (-5) <sup>1</sup>	11 (11) <sup>1</sup>
China	11 (8) <sup>1</sup>	27 (31) <sup>1</sup>	51 (47) <sup>1</sup>	24 (16) <sup>1</sup>	40 (39) <sup>1</sup>
Hong Kong	4 (4) <sup>1</sup>	16 (15) <sup>1</sup>	17 (17) <sup>1</sup>	1 (2) <sup>1</sup>	13 (13) <sup>1</sup>
India	34 (30) <sup>1</sup>	42 (41) <sup>1</sup>	42 (38) <sup>1</sup>	0 (-3) <sup>1</sup>	8 (8) <sup>1</sup>
Japan	-4 (-2) <sup>1</sup>	3 (6) <sup>1</sup>	4 (6) <sup>1</sup>	1 (0) <sup>1</sup>	8 (8) <sup>1</sup>
New Zealand	1 (2) <sup>1</sup>	15 (17) <sup>1</sup>	15 (16) <sup>1</sup>	0 (-1) <sup>1</sup>	14 (14) <sup>1</sup>
Singapore	14 (15) <sup>1</sup>	23 (23) <sup>1</sup>	22 (23) <sup>1</sup>	-1 (0) <sup>1</sup>	8 (8) <sup>1</sup>
Taiwan	17 (17) <sup>1</sup>	39 (36) <sup>1</sup>	40 (40) <sup>1</sup>	1 (4) <sup>1</sup>	23 (23) <sup>1</sup>

EMEA*	Net Employment Outlook			Qtr on Qtr Change	Yr on Yr Change
	Quarter 4 2009	Quarter 3 2010	Quarter 4 2010	Q4 2010 to Q3 2010	Q4 2010 to Q4 2009
	%	%	%		
Austria	-3 (-3) <sup>1</sup>	8 (6) <sup>1</sup>	5 (5) <sup>1</sup>	-3 (-1) <sup>1</sup>	8 (8) <sup>1</sup>
Belgium	2 (2) <sup>1</sup>	4 (4) <sup>1</sup>	6 (6) <sup>1</sup>	2 (2) <sup>1</sup>	4 (4) <sup>1</sup>
Czech Republic	-4	1	-2	-3	2
France	0 (-1) <sup>1</sup>	4 (3) <sup>1</sup>	1 (0) <sup>1</sup>	-3 (-3) <sup>1</sup>	1 (1) <sup>1</sup>
Germany	-1 (-1) <sup>1</sup>	10 (8) <sup>1</sup>	7 (7) <sup>1</sup>	-3 (-1) <sup>1</sup>	8 (8) <sup>1</sup>
Greece	0	-5	-10	-5	-10
Hungary	-4	3	0	-3	4
Ireland	-10 (-8) <sup>1</sup>	-3 (-6) <sup>1</sup>	-3 (-1) <sup>1</sup>	0 (5) <sup>1</sup>	7 (7) <sup>1</sup>
Italy	-5 (-5) <sup>1</sup>	-8 (-9) <sup>1</sup>	-8 (-9) <sup>1</sup>	0 (0) <sup>1</sup>	-3 (-4) <sup>1</sup>
Netherlands	2 (1) <sup>1</sup>	3 (3) <sup>1</sup>	2 (1) <sup>1</sup>	-1 (-2) <sup>1</sup>	0 (0) <sup>1</sup>
Norway	1 (3) <sup>1</sup>	11 (6) <sup>1</sup>	9 (11) <sup>1</sup>	-2 (5) <sup>1</sup>	8 (8) <sup>1</sup>
<b>Poland</b>	<b>5</b>	<b>18</b>	<b>11</b>	<b>-7</b>	<b>6</b>
Romania	-11	2	0	-2	11
South Africa	1	7	6	-1	5
Spain	-11 (-8) <sup>1</sup>	-3 (-6) <sup>1</sup>	-4 (-1) <sup>1</sup>	-1 (5) <sup>1</sup>	7 (7) <sup>1</sup>
Sweden	3 (3) <sup>1</sup>	10 (8) <sup>1</sup>	5 (5) <sup>1</sup>	-5 (-3) <sup>1</sup>	2 (2) <sup>1</sup>
Switzerland	-3 (1) <sup>1</sup>	-3 (-1) <sup>1</sup>	9 (15) <sup>1</sup>	12 (16) <sup>1</sup>	12 (14) <sup>1</sup>
UK	0 (-1) <sup>1</sup>	2 (1) <sup>1</sup>	2 (1) <sup>1</sup>	0 (0) <sup>1</sup>	2 (2) <sup>1</sup>

\*EMEA – Europe, Middle East and Africa.

1. Number in parentheses is the Net Employment Outlook when adjusted to remove the impact of seasonal variations in hiring activity. Please note that this data is not available for all countries as a minimum of 17 quarters worth of data is required.

# Manpower Employment Outlook Survey Poland

Nearly 62,000 employers have been interviewed across 36 countries and territories to measure anticipated employment trends\* between October and December 2010. Employers in 28 of the 36 countries and territories Manpower surveyed expect to add to their workforces to varying degrees over the next three months.

Employers in China, Taiwan, India and Brazil report the strongest fourth-quarter hiring plans, while those in Greece, Italy and the Czech Republic report the weakest hiring forecasts. The quarter-over-quarter hiring pace is expected to improve in 14 of the 36 countries and territories, while a year-over-year comparison indicates hiring will improve in 32 of 36 countries and territories.

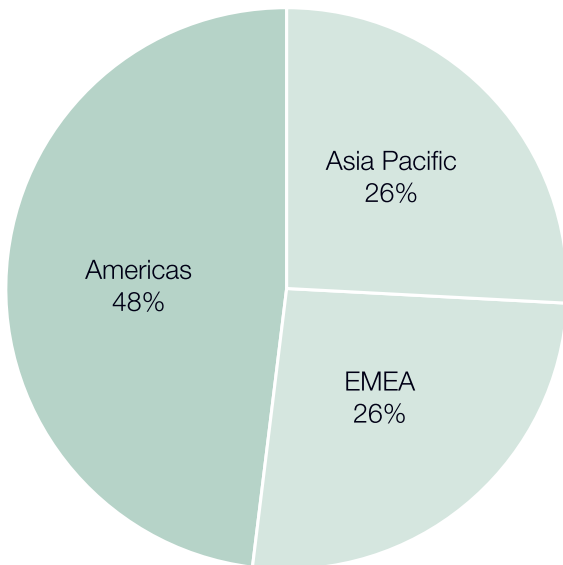
Regionally, employers in the Americas and Asia Pacific continue to report positive Net Employment Outlooks.

The Outlooks decline slightly in the U.S. and India from Quarter 3 2010, but hiring demands have improved somewhat from 12 months ago in all 17 countries and territories where year-over-year data is available in the Americas and Asia Pacific. Employers in China and Taiwan report their most optimistic Outlooks since their surveys began.

In the Europe, Middle East & Africa (EMEA) region, Outlooks decline in 11 of 18 countries from three months ago. However, year-over-year comparisons are more favorable, showing an improvement in 15 countries from Quarter 4 2009. Hiring intentions are strongest in Switzerland, Norway and Poland, with employers in Switzerland reporting their most optimistic Net Employment Outlook since the survey began there in Quarter 3 2005.

\* Commentary is based on seasonally adjusted data where available.

## Survey Respondents by Region



Research for the Quarter 4 Manpower Employment Outlook Survey involved surveying nearly 62,000 human resources directors and senior hiring managers from public and private organizations worldwide. 48% of respondents came from 10 countries in the Americas; 26% from eight countries and territories across Asia Pacific; and 26% from 18 countries in EMEA.

# International Comparisons – Americas

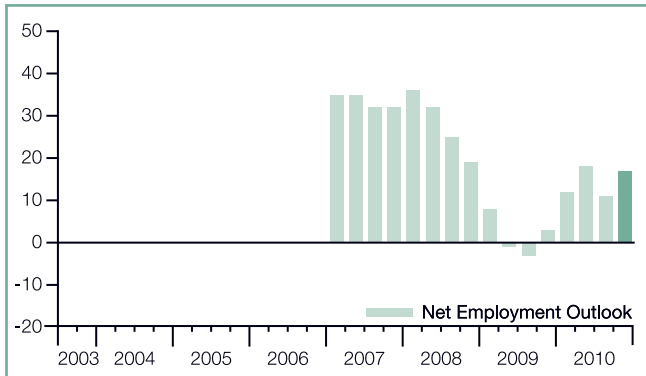
Nearly 30,000 interviews have been conducted across Argentina, Brazil, Canada, Colombia, Costa Rica, Guatemala, Mexico, Panama, Peru and the United States to measure employment prospects for Quarter 4 2010. The data shows positive hiring intentions across the region for the next three months, however, the Net Employment Outlooks are expected to be slightly weaker quarter-over-quarter in four of the 10 countries surveyed and stronger in all nine countries where year-over-year data is available.

Hiring prospects in Brazil, Peru and Costa Rica are the strongest within the region. Conversely, U.S. job

seekers are likely to face the region's weakest employment prospects; the Outlook declines slightly from three months ago but moderately improves year-over-year. Following seven consecutive quarters of Outlook improvement, Mexican employers report their strongest hiring intentions of the year. Similarly, Canadian employers are reporting their most optimistic forecast of 2010, fueled largely by the most optimistic Manufacturing-Durable Goods Outlook in 10 years.

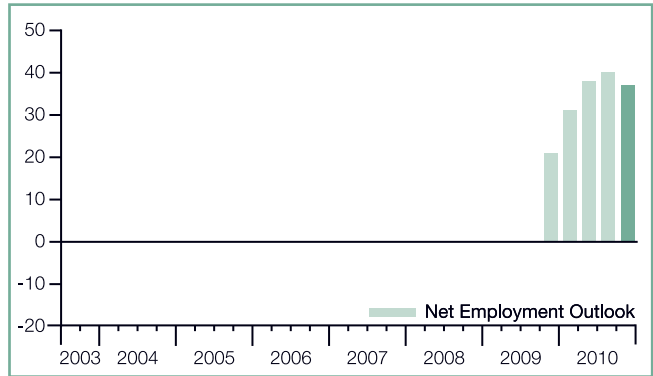
Optimism in Brazil is driven by strength in the Finance, Insurance & Real Estate and Services industry sectors where more than half of all employers surveyed intended to add to their payrolls in the upcoming quarter.

## Argentina



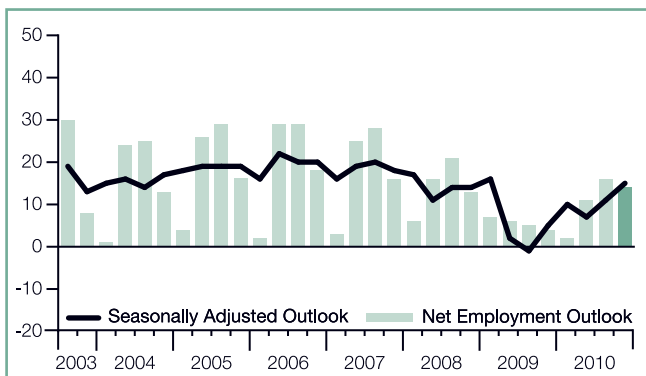
Argentina joined the survey in Q1 2007.

## Brazil

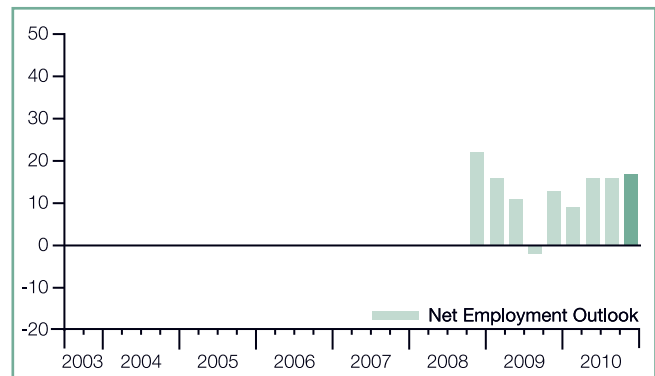


Brazil joined the survey in Q4 2009.

## Canada

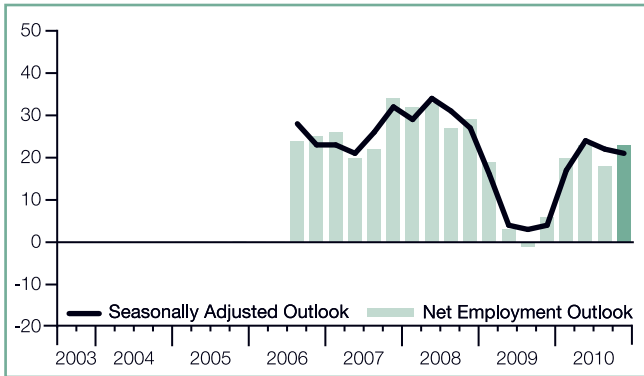


## Colombia



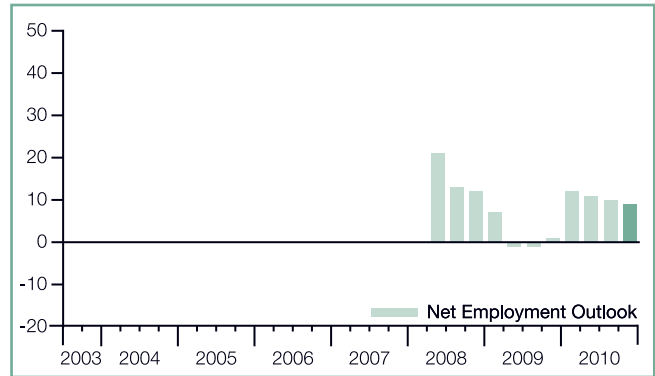
Colombia joined the survey in Q4 2008.

Costa Rica



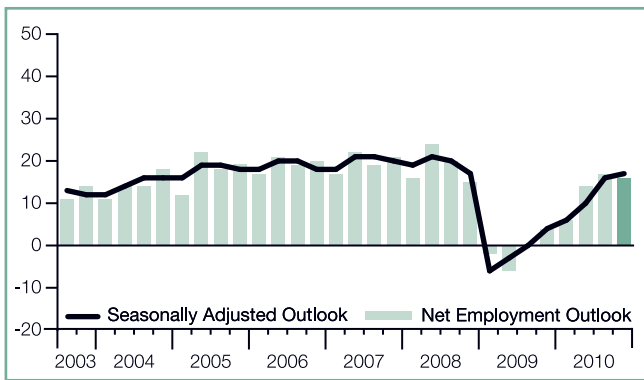
Costa Rica joined the survey in Q3 2006.

Guatemala



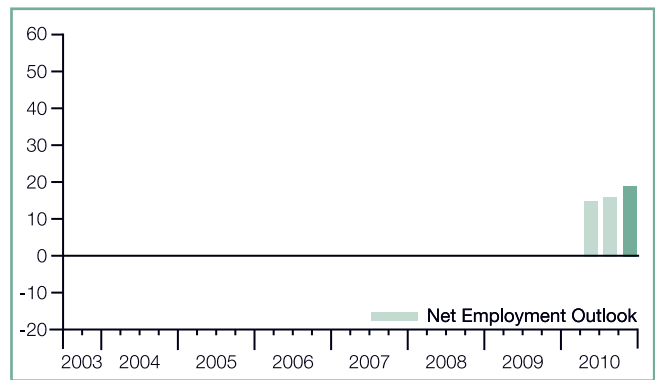
Guatemala joined the survey in Q2 2008.

Mexico



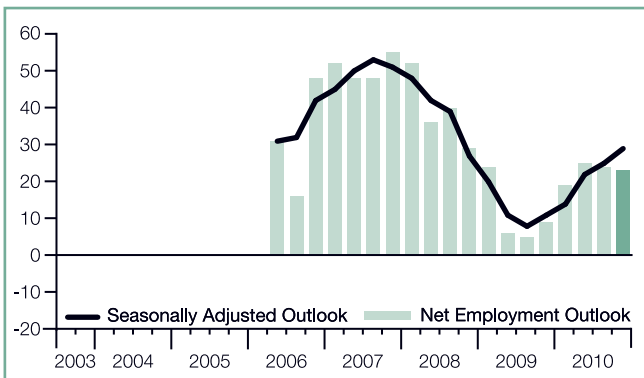
No bar indicates Net Employment Outlook of zero.

Panama



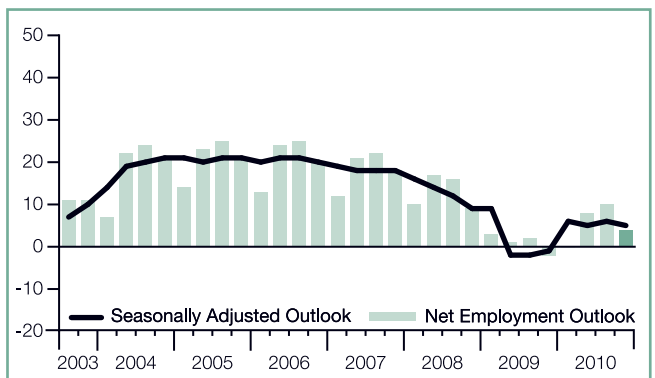
Panama joined the survey in Q2 2010.

Peru



Peru joined the survey in Q2 2006.

United States



No bar indicates Net Employment Outlook of zero.

# International Comparisons – Asia-Pacific

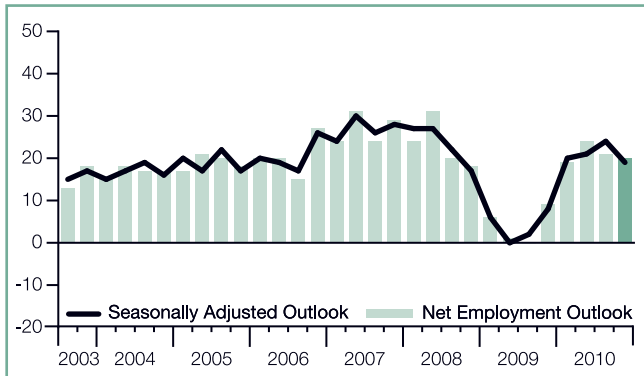
Over 16,000 interviews have been conducted across the Asia Pacific region to measure anticipated hiring activity between October and December 2010.

Across the entire region, employers report positive hiring intentions for the next three months, with those in China and Taiwan reporting the strongest hiring expectations, as well as the most optimistic Outlooks since the surveys started in 2Q 2005. Employer hiring plans are mixed when quarter-over-quarter comparisons are made with

employers in Australia reporting a moderate decline, and those in India and New Zealand forecasting slightly weaker labor markets. Employers in all countries and territories indicate improved hiring plans compared to Quarter 4 2009.

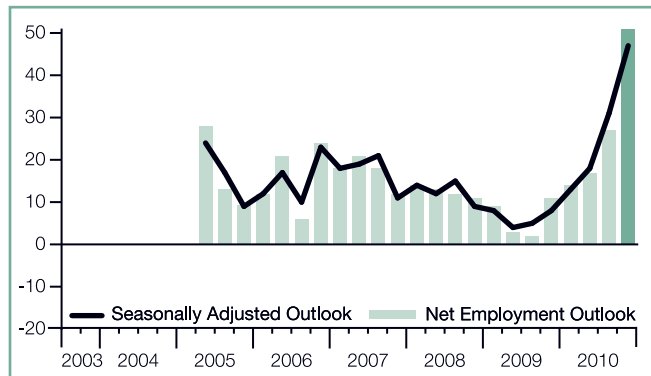
The Outlook in Japan remains cautiously optimistic; however, the forecast in the country's Manufacturing industry sector improves for the sixth consecutive quarter. Meanwhile, the hiring pace remains robust in India, fueled by booming prospects for job seekers in the Public Administration/Education industry sector.

## Australia



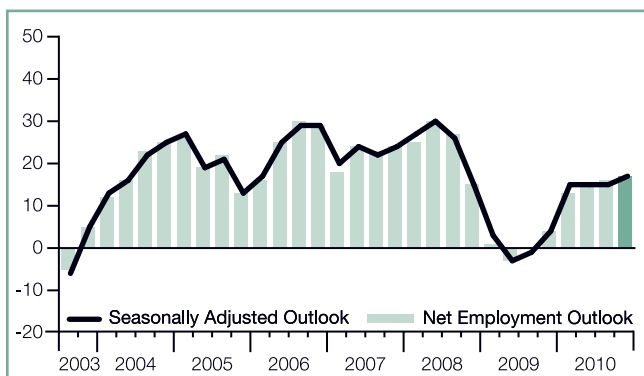
No bar indicates Net Employment Outlook of zero.

## China



China joined the survey in Q2 2005.

## Hong Kong



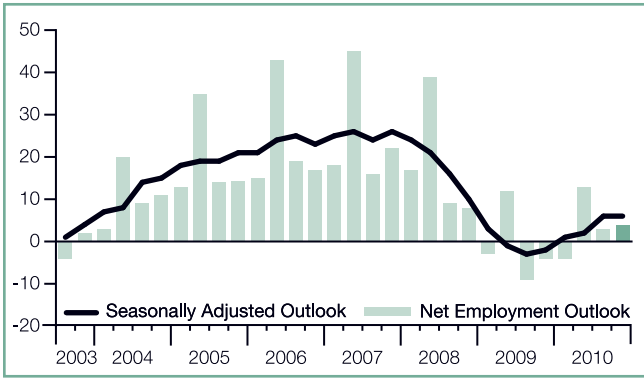
No bar indicates Net Employment Outlook of zero.

## India

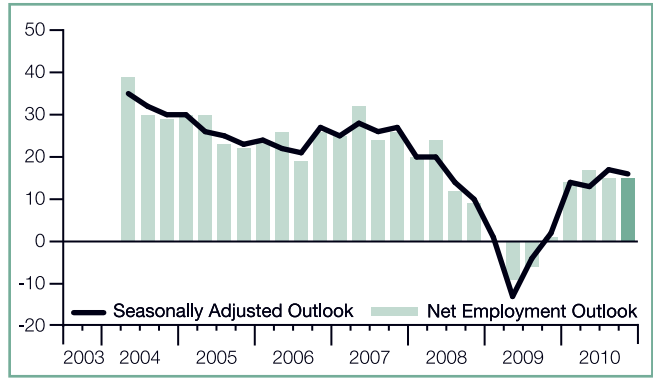


India joined the survey in Q3 2005.

Japan

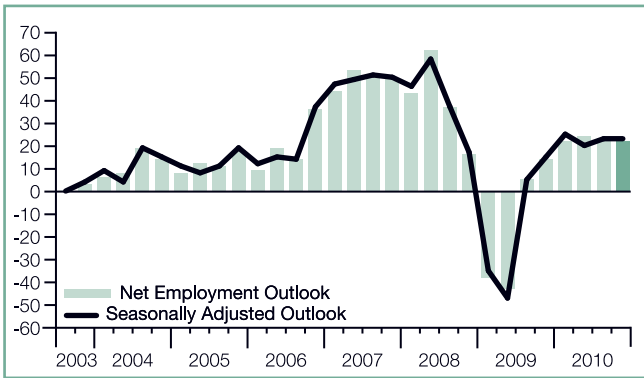


New Zealand



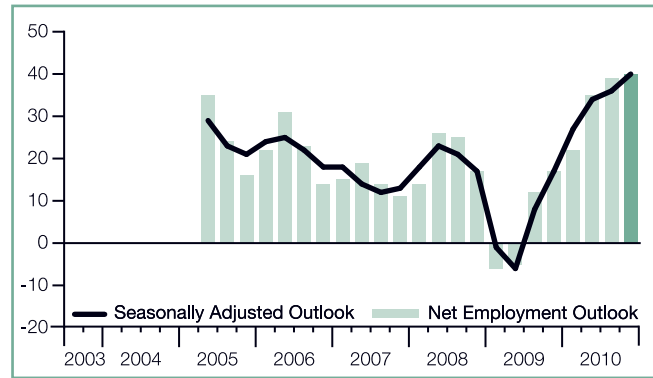
New Zealand joined the survey in Q2 2004.  
No bar indicates Net Employment Outlook of zero.

Singapore



No bar indicates Net Employment Outlook of zero.

Taiwan



Taiwan joined the survey in Q2 2005.

# International Comparisons – EMEA

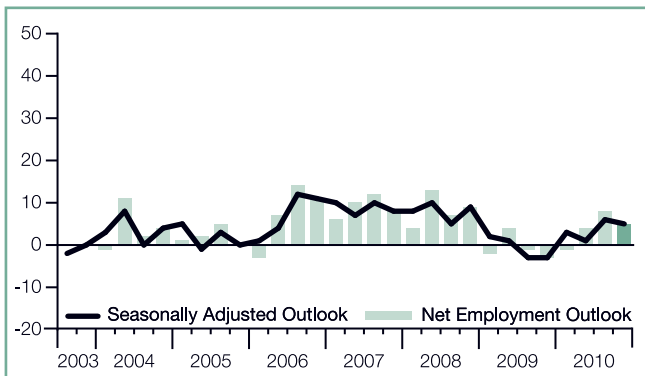
Nearly 16,000 interviews have been conducted with employers across 18 EMEA countries to measure anticipated hiring activity for Quarter 4 2010.

Similar to the third quarter, fourth-quarter hiring expectations remain mixed. Employers in 10 countries are anticipating varying degrees of positive hiring activity for the next three months, but those in 11 expect the pace of hiring to soften from three months ago. However, the year-over-year comparison is more positive, with employers in 15 of the 18 countries surveyed reporting stronger hiring plans.

Hiring expectations are strongest in Switzerland, Norway, Poland and Germany, and weakest in Greece, Italy and the Czech Republic.

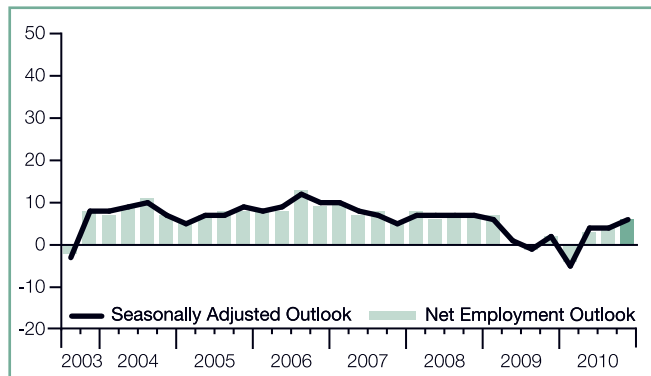
Notable improvements are reported across the region in the Finance & Business Services sector, where year-over-year forecasts improve in 15 of the region's 18 countries—most notably in Switzerland, Germany and Norway. Swiss employers report their most optimistic Outlook since the survey began in Quarter 3 2005. Meanwhile, job prospects are expected to deteriorate further in Greece where employers report their least optimistic hiring intentions since the survey was launched in Quarter 2 2008.

## Austria



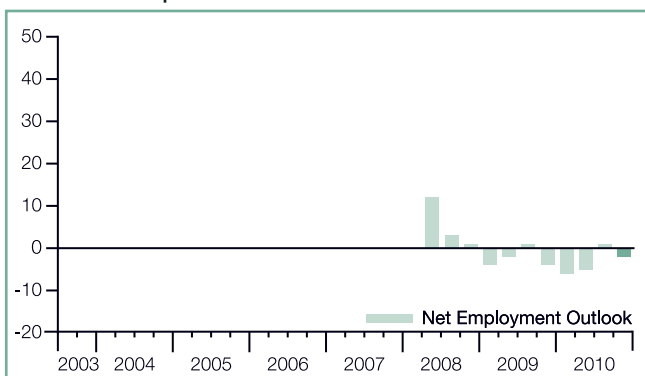
No bar indicates Net Employment Outlook of zero.

## Belgium



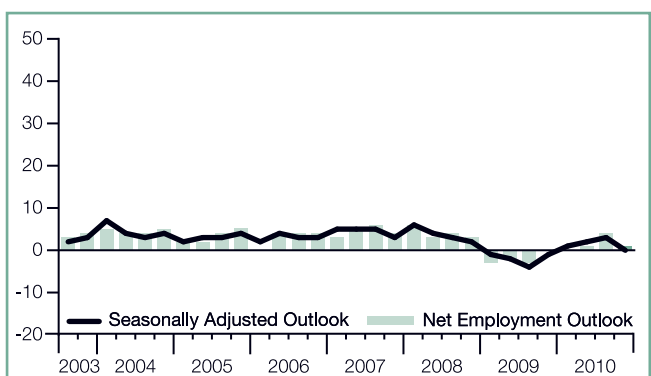
No bar indicates Net Employment Outlook of zero.

## Czech Republic



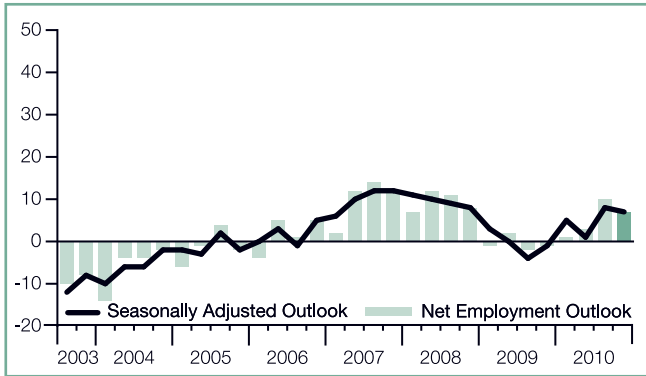
Czech Republic joined the survey in Q2 2008.

## France

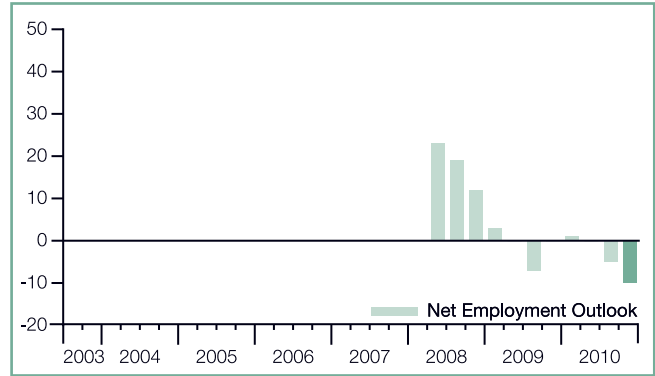


No bar indicates Net Employment Outlook of zero.

Germany

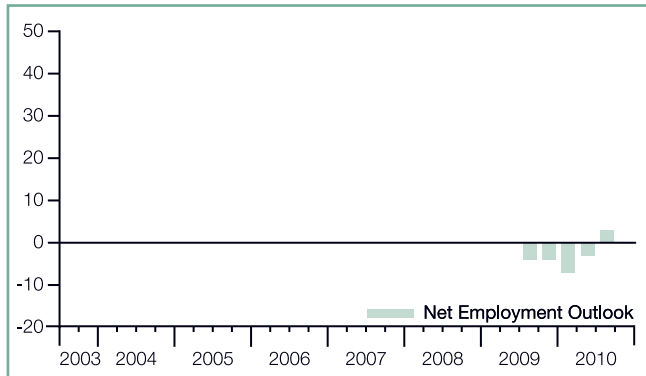


Greece



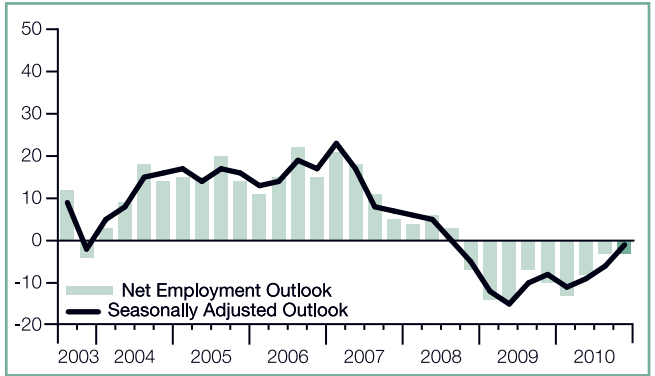
Greece joined the survey in Q2 2008.  
No bar indicates Net Employment Outlook of zero.

Hungary

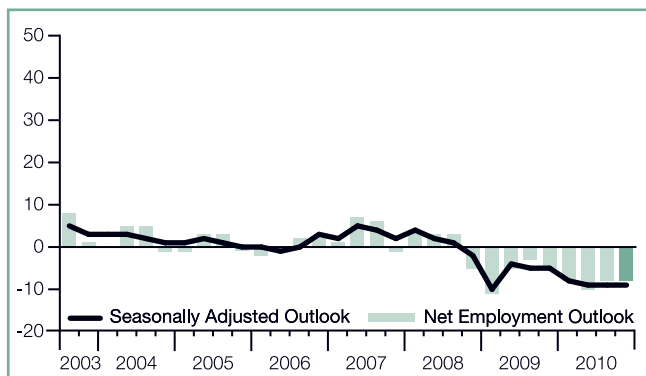


Hungary joined the survey in Q3 2009.  
No bar indicates Net Employment Outlook of zero.

Ireland

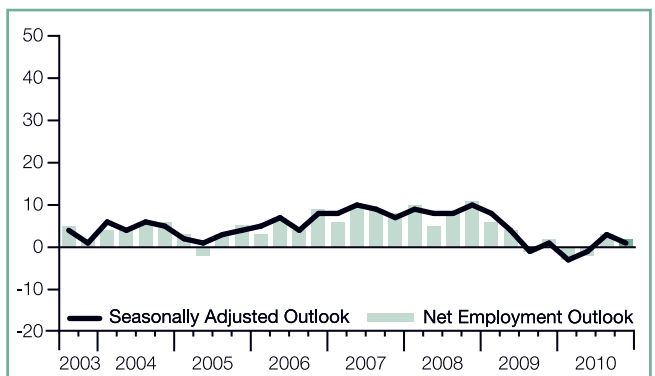


Italy

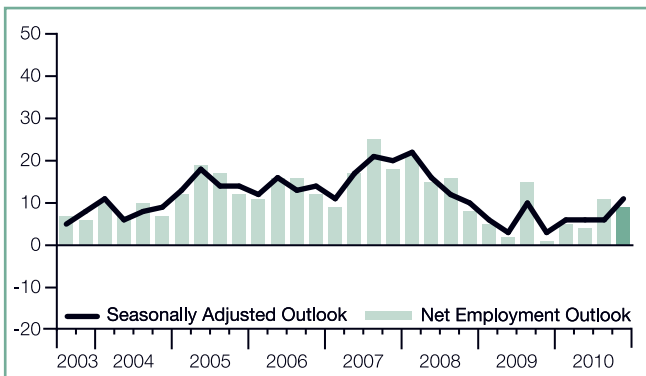


No bar indicates Net Employment Outlook of zero.

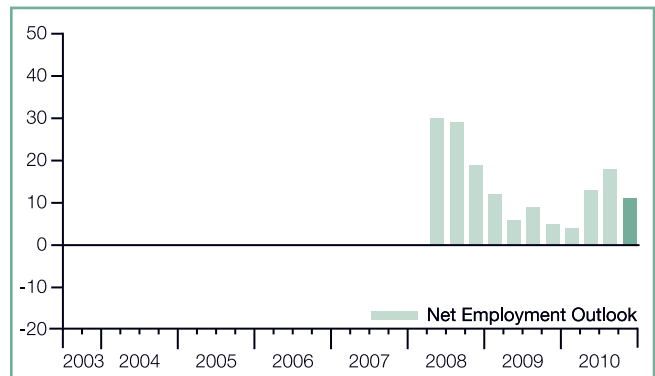
Netherlands



Norway



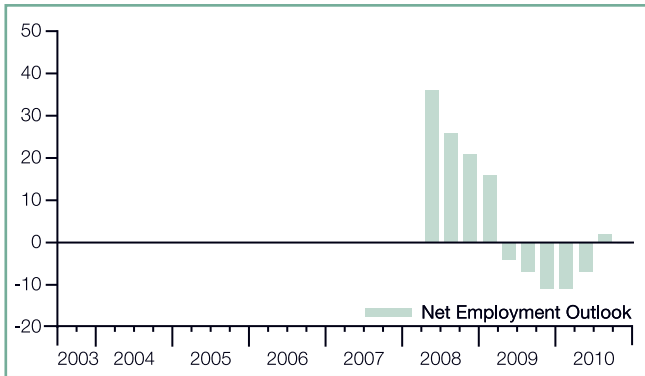
Poland



Poland joined the survey in Q2 2008.

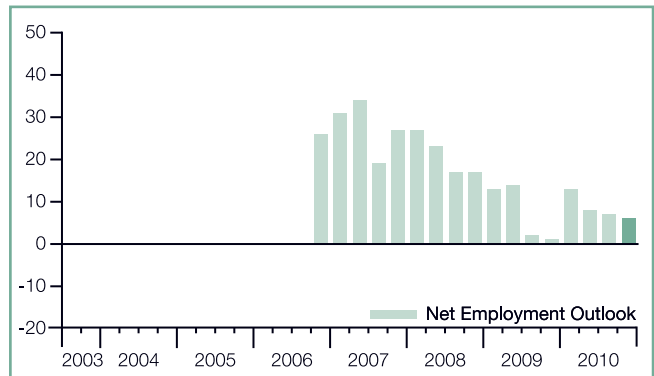


## Romania



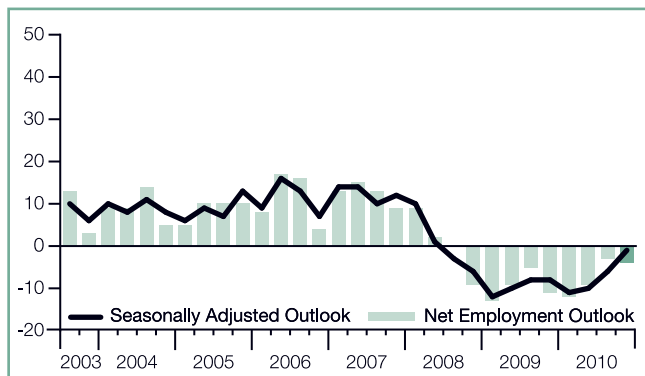
Romania joined the survey in Q2 2008.  
No bar indicates Net Employment Outlook of zero.

## South Africa



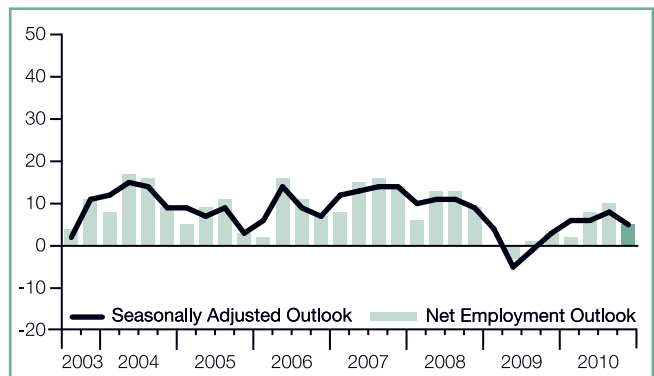
South Africa joined the survey in Q4 2006.

## Spain



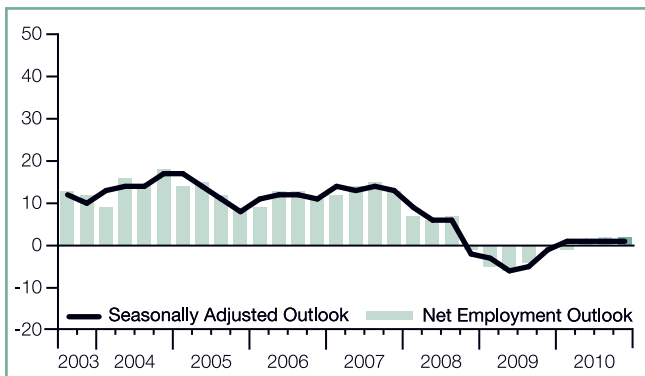
No bar indicates Net Employment Outlook of zero.

## Sweden



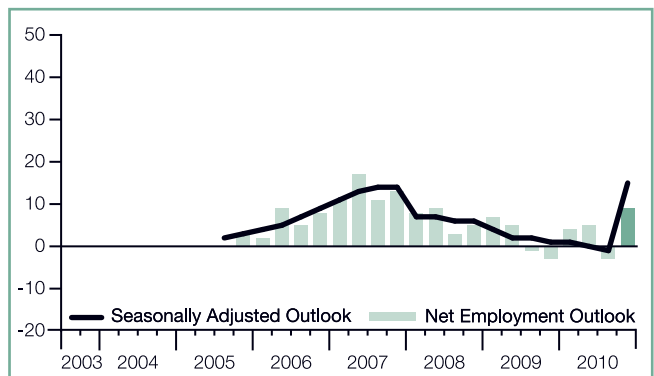
No bar indicates Net Employment Outlook of zero.

## UK



No bar indicates Net Employment Outlook of zero.

## Switzerland



Switzerland joined the survey in Q3 2005.  
No bar indicates Net Employment Outlook of zero.

## About the Manpower Employment Outlook Survey

The Manpower Employment Outlook Survey is conducted quarterly to measure employers' intentions to increase or decrease the number of employees in their workforces during the next quarter. The survey has been running for more than 47 years and is one of the most trusted surveys of employment activity in the world. Various factors underpin the success of the Manpower Employment Outlook Survey:

**Unique:** It is unparalleled in its size, scope, longevity and area of focus.

**Projective:** The Manpower Employment Outlook Survey is the most extensive, forward-looking employment survey in the world, asking employers to forecast employment over the next quarter. In contrast, other surveys and studies focus on retrospective data to report on what occurred in the past.

**Independent:** The survey is conducted with a representative sample of employers from throughout the countries in which it is conducted. The survey participants are not derived from Manpower's customer base.

**Robust:** The survey is based on interviews with nearly 62,000 public and private employers across 36 countries and territories to measure anticipated employment trends each quarter. This sample allows for analysis to be performed across specific sectors and regions to provide more detailed information.

**Focused:** For nearly five decades, the survey has derived all of its information from a single question.

## Survey Question

All employers participating in the survey worldwide are asked the same question, "How do you anticipate total employment at your location to change in the three months to the end of December 2010 as compared to the current quarter?"

## Methodology

The Manpower Employment Outlook Survey is conducted using a validated methodology, in accordance with the highest standards in market research. The research team for the 36 countries and territories where the survey is currently conducted includes Manpower's internal research team and Infocorp Ltd. The survey has been structured to be representative of each national economy. The margin of error for all national, regional and global data is not greater than +/- 3.9%. The survey for all 36 countries was conducted between July 15 and 28, 2010.

The Manpower Employment Outlook Survey for Poland is based on interviews with a representative sample of 750 Polish employers. The margin of sampling error is +/-3.6%. The regional division of Poland, used for the

survey purposes, is defined as by Eurostat: Central (łódzkie, mazowieckie), East (lubelskie, podkarpackie, świętokrzyskie, podlaskie), North (kujawsko-pomorskie, warmińsko-mazurskie, pomorskie), North-West (wielkopolskie, zachodniopomorskie, lubuskie), South (małopolskie, śląskie), South-West (dolnośląskie, opolskie).

## Net Employment Outlook

Throughout this report, we use the term "Net Employment Outlook." This figure is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook.

## Seasonal Adjustment

Seasonal adjustments have been applied to the data for Australia, Austria, Belgium, Canada, Costa Rica, China, France, Germany, Hong Kong, India, Ireland, Italy, Japan, Mexico, Netherlands, New Zealand, Norway, Peru, Singapore, Spain, Sweden, Switzerland, Taiwan, the United Kingdom and the United States to provide additional insight into the survey data. These adjustments make it possible to review the data without the employment fluctuations that normally occur at the same time each year, thus providing a clearer picture of the data over time. Manpower intends to add seasonal adjustments to the data for other countries in the future, as more historical data is compiled. Note that in Quarter 2 2008, Manpower adopted the TRAMO-SEATS method of seasonal adjustment for data.

## History of the Survey

- 1962 First generation of the Manpower Employment Outlook Survey launched in the United States and Canada.
- 1966 Manpower's United Kingdom operation launches the equivalent of the United States survey, naming the report the Quarterly Survey of Employment Prospects. The survey adopts the same forward looking research format as the United States survey and is the first of its kind in Europe.
- 1976 Second generation of Manpower's Employment Outlook Survey launched in the United States and Canada. Research methodology is updated to evolve with advancements in the field of market research.
- 2002 Manpower United Kingdom's Quarterly Survey of Employment Prospects is updated to adopt an enhanced research methodology. Manpower's operations in Mexico and Ireland launch the survey in their respective countries.
- 2003 Third generation of the Manpower Employment Outlook Survey is launched, expanding the program to a total of 18 countries worldwide: Australia, Austria, Belgium, Canada, France, Germany, Hong Kong, Ireland, Italy, Japan, Mexico, Netherlands, Norway, Singapore, Spain, Sweden, the United Kingdom and the United States.
- 2004 Manpower operations in New Zealand launch the Manpower Employment Outlook Survey.
- 2005 Manpower operations in China, India, Switzerland, and Taiwan launch the Manpower Employment Outlook Survey.
- 2006 Manpower operations in Costa Rica and Peru join the survey program. Surveys in Australia, Austria, Belgium, France, Germany, Hong Kong, Ireland, Italy, Japan, Mexico, Netherlands, Norway, Singapore, Spain and Sweden add seasonally adjusted data in the third quarter. Manpower operations in South Africa launch the Manpower Employment Outlook Survey.
- 2007 Manpower operations in Argentina join the Manpower Employment Outlook Survey. The survey in New Zealand adds seasonally adjusted data in the first quarter.
- 2008 Manpower operations in Colombia, the Czech Republic, Greece, Guatemala, Poland and Romania join the survey program. China and Taiwan add seasonally adjusted data in the second quarter. India and Switzerland add seasonally adjusted data in the third quarter.
- 2009 Manpower operations in Hungary and Brazil launch the Manpower Employment Outlook Survey.
- 2010 Manpower's Panama operation launches the Manpower Employment Outlook Survey, expanding the program total to 36 countries and territories worldwide. Peru adds seasonally adjusted data in the second quarter. Costa Rica adds seasonally adjusted data in the fourth quarter.

## About Manpower Inc.

Manpower Inc. (NYSE: MAN) is a world leader in innovative workforce solutions; creating and delivering services that enable its clients to win in the changing world of work. With over 60 years' experience, Manpower offers employers a range of services and solutions for the entire employment and business cycle including permanent, temporary and contract recruitment; employee assessment and selection; training; outplacement; outsourcing and consulting. Manpower's worldwide network of nearly 4,000 offices in 82 countries and territories is the world's largest in the industry and enables the company to meet the needs of its 400,000 clients per year, including small and medium size enterprises in all industry sectors, as well as the world's largest multinational corporations. The focus of Manpower's work is on raising productivity through improved quality, efficiency and cost-reduction across their total workforce, enabling clients to concentrate on their core business activities. Manpower Inc. operates under five brands: Manpower, Manpower Professional, Elan, Jefferson Wells and Right Management. More information about Manpower Inc. is available at [www.manpower.com](http://www.manpower.com).

## About Manpower Poland

Manpower Poland has operated since March 2001. Currently, there are almost 50 branches in Poland. The company's portfolio covers temporary employment, permanent and contract recruitment, outsourcing and consulting. From the Manpower group in Poland there are Manpower Professional, Manpower Business Solutions, Right Management, Elan. More information on Manpower Poland is available at [www.manpower.pl](http://www.manpower.pl).

Manpower Inc., ul. Nowogrodzka 68, 02-014 Warsaw  
Tel: (+48) 22 50 40 715, Fax: (+48) 22 50 40 717  
[www.manpower.pl](http://www.manpower.pl)

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