

Q2/2013

Manpower  
Employment  
Outlook Survey  
Poland



Manpower®

# Q2/13

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# Poland Employment Outlook

The Manpower Employment Outlook Survey for the second quarter 2013 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 June 2013 as compared to the current quarter?”*

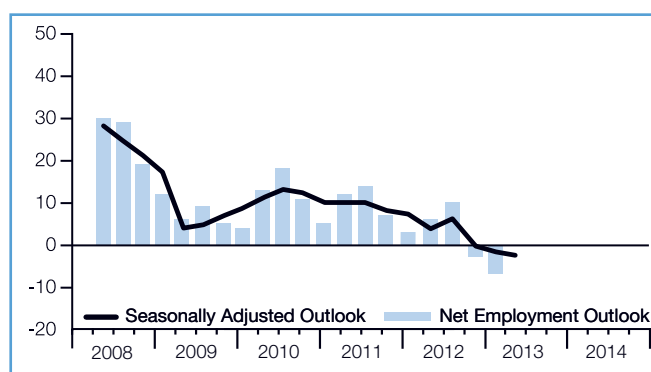
Polish employers report mixed hiring intentions for 2Q 2013. While 11% of employers expect to increase staffing levels, 11% forecast a decrease and 75% anticipate no change, resulting in a Net Employment Outlook of 0%.

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.

When compared with the previous quarter, hiring prospects strengthen by 6 percentage points, but the Outlook is 6 percentage points weaker year-over-year.

Once seasonal variation is removed from the data, the Outlook stands at -2%. Quarter-over-quarter, hiring intentions remain relatively stable but the Outlook declines by 6 percentage points year-over-year.

From this point forward, all data discussed in the commentary is seasonally adjusted, unless stated otherwise.



No bar indicates Net Employment Outlook of zero.

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted Outlook
	%	%	%	%	%	%
<b>Q2 2013</b>	<b>11</b>	<b>11</b>	<b>75</b>	<b>3</b>	<b>0</b>	<b>-2</b>
Q1 2013	9	15	73	3	-6	-1
Q4 2012	12	14	69	5	-2	0
Q3 2012	17	7	70	6	10	6
Q2 2012	16	10	69	5	6	4

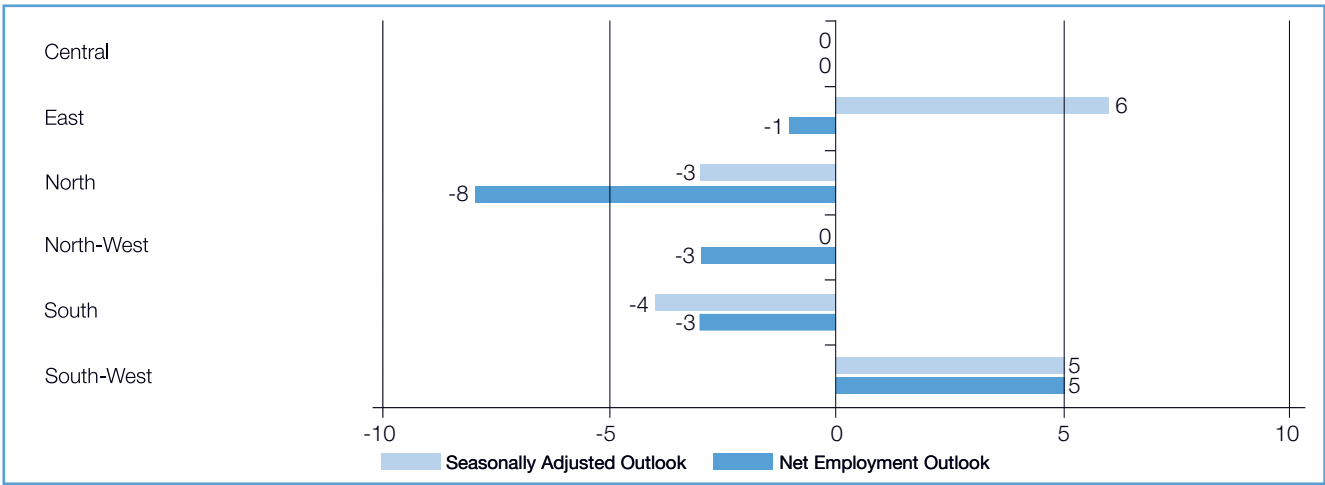
## Regional Comparisons

Employers in four of the six regions forecast negative payroll growth in the upcoming quarter. The weakest labor market is anticipated in the North where employers report a Net Employment Outlook of -8%, while Outlooks stand at -3% in both the North-West and the South. Meanwhile, employers in the South-West anticipate some payroll gains with an Outlook of +5%.

Quarter-over-quarter, hiring prospects weaken in three of the six regions, most notably by 7 percentage points in the North and by 2 percentage points in the Central region.

However, employers report stronger hiring prospects in two regions, including the South where the Outlook increases by 5 percentage points.

Year-over-year, employers report weaker hiring intentions in five of the six regions. Employers in both the North and the South report considerable Outlook declines of 11 and 9 percentage points, respectively. North-West employers report a decrease of 8 percentage points and hiring prospects weaken by 3 percentage points in both the East and the South-West. The Outlook for Central Poland remains unchanged.

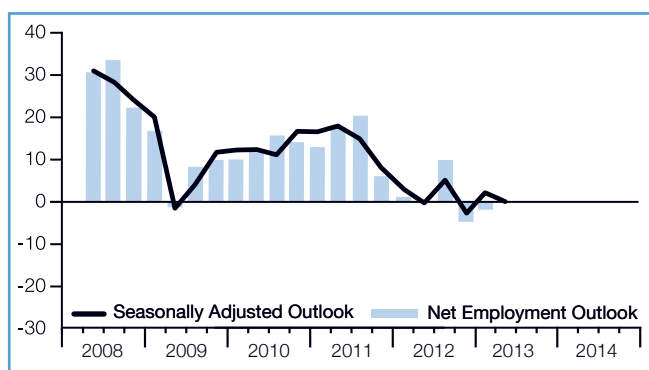


\* Regions of Poland according to Eurostat: Central (łódzkie, mazowieckie), East (lubelskie, podkarpackie, świętokrzyskie, podlaskie), North (kujawsko-pomorskie, warmińsko-mazurskie, pomorskie), North-West (wielkopolskie, zachodniopomorskie, lubuskie), South (małopolskie, śląskie), South-West (dolnośląskie,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

## Central 0%

With a Net Employment Outlook of 0%, employers in the Central region forecast a flat labor market during 2Q 2013. The Outlook declines by 2 percentage points quarter-over-quarter but is unchanged year-over-year.

Based on unadjusted survey data, employers report mixed hiring intentions for the next three months. The Outlook remains relatively stable quarter-over-quarter and is unchanged year-over-year.

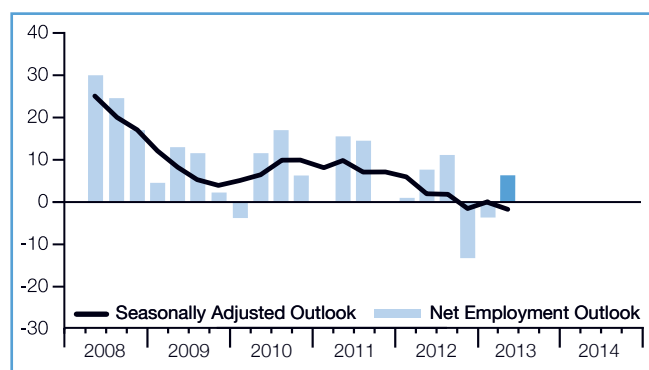


No bar indicates Net Employment Outlook of zero.

## East -1%

Subdued hiring activity is expected to continue in 2Q 2013, with employers reporting a Net Employment Outlook of -1%. Hiring prospects remain relatively stable quarter-over-quarter but decline by 3 percentage points year-over-year.

Based on unadjusted survey data, employers forecast some payroll gains in the coming quarter. The Outlook is considerably stronger quarter-over-quarter but slightly weaker year-over-year.

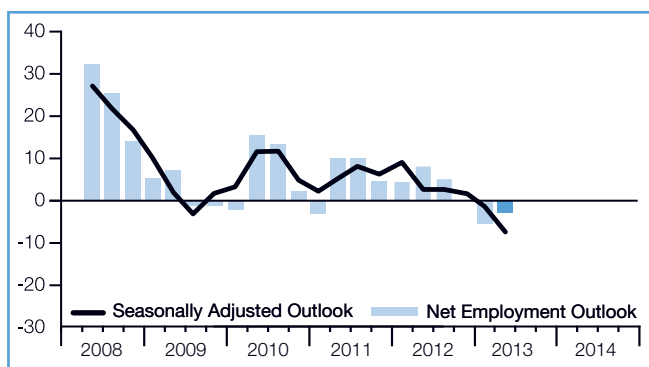


No bar indicates Net Employment Outlook of zero.

## North -8%

Job seekers are likely to face the weakest hiring climate since the survey began in 2Q 2008, according to employers who report a Net Employment Outlook of -8% for the April-June period. Hiring plans weaken by 7 percentage points quarter-over-quarter and by 11 percentage points year-over-year.

Based on unadjusted survey data, employers report subdued hiring intentions for the coming quarter. The Outlook is slightly stronger when compared with the previous quarter but considerably weaker year-over-year.

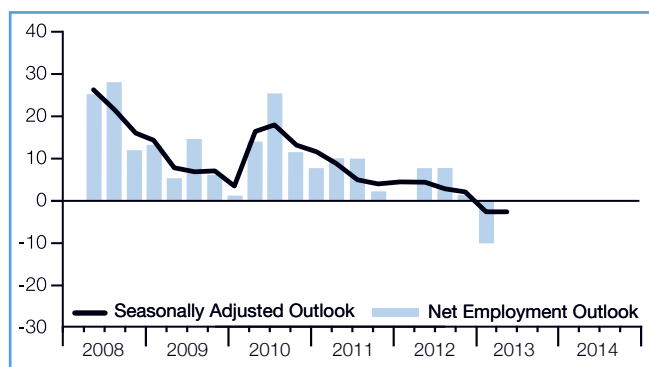


No bar indicates Net Employment Outlook of zero.

## North-West -3%

Employers anticipate negative headcount growth in the next three months with a Net Employment Outlook of -3% for the second consecutive quarter. Year-over-year, hiring prospects weaken by 8 percentage points.

Based on unadjusted survey data, employers forecast a flat labor market in the coming quarter, reflecting a considerable quarter-over-quarter improvement in the Outlook. However, hiring plans are moderately weaker year-over-year.

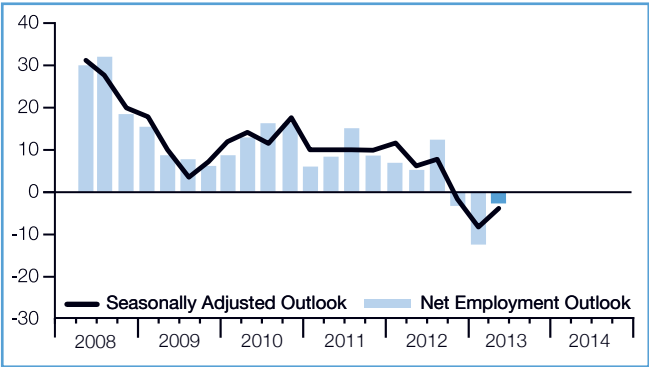


No bar indicates Net Employment Outlook of zero.

South -3%

With a Net Employment Outlook of -3%, employers forecast a dull hiring climate in the South during the April-June period. While the Outlook is 5 percentage points stronger quarter-over-quarter, hiring prospects decline by 9 percentage points year-over-year.

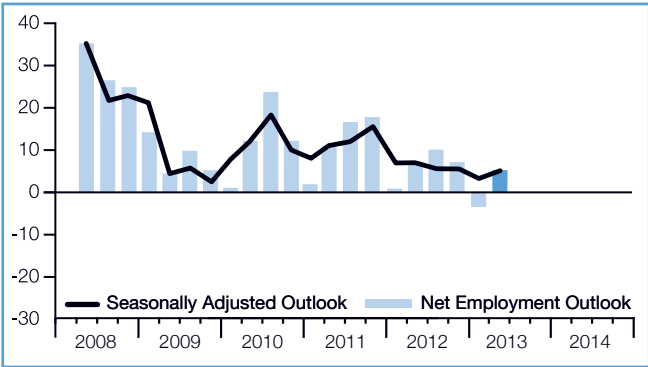
Based on unadjusted survey data, employers report muted hiring plans for 2Q 2013. The Outlook is moderately stronger quarter-over-quarter but considerably weaker year-over-year.



South-West +5%

Some opportunities to increase staffing levels are expected in the South during 2Q 2013, according to employers who report a Net Employment Outlook of +5%. The Outlook remains relatively stable quarter-over-quarter but declines by 3 percentage points year-over-year.

Based on unadjusted survey data, employers report encouraging signs for job seekers in the coming quarter. The Outlook is moderately stronger quarter-over-quarter but slightly weaker year-over-year.



## Sector Comparisons

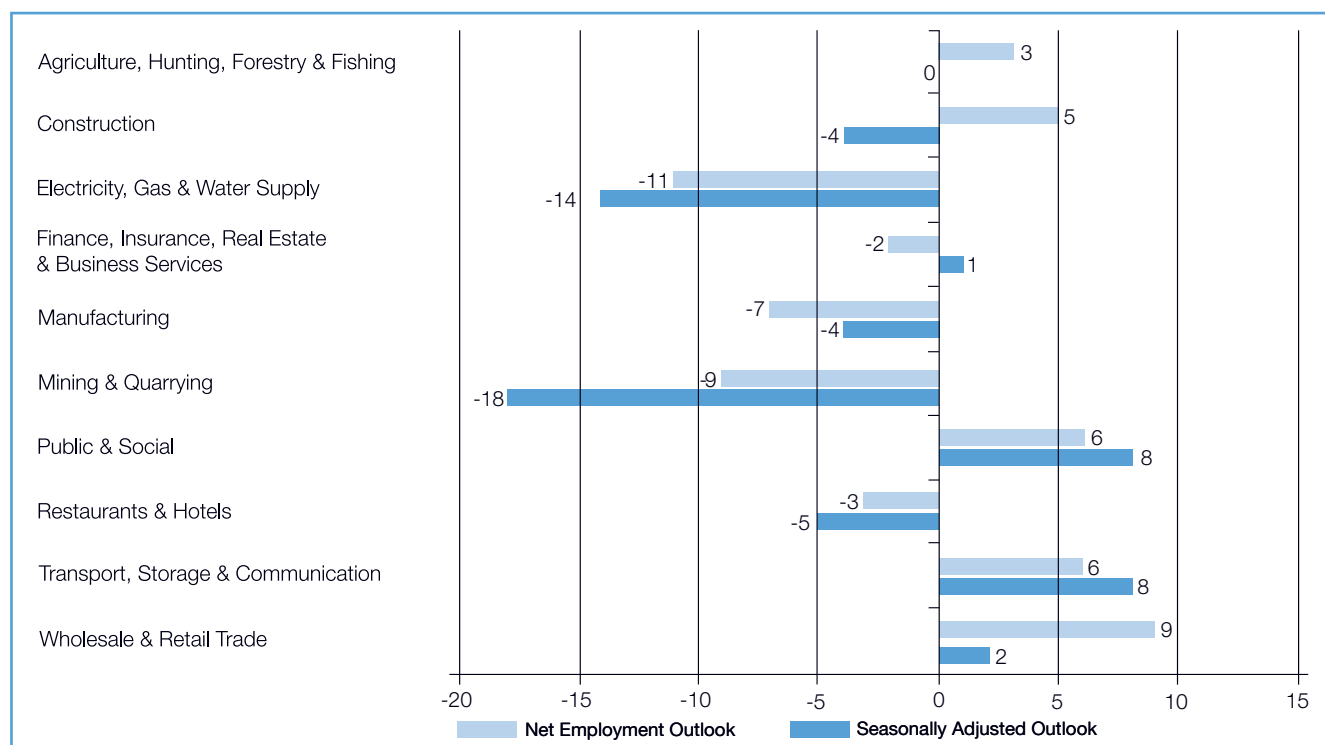
Employers in five of the 10 industry sectors expect to trim payrolls during 2Q 2013. The weakest labor markets are expected in the Mining & Quarrying sector and in the Electricity, Gas & Water Supply sector, where Net Employment Outlooks stand at -18% and -14%, respectively. Sluggish hiring activity is also forecast in the Restaurants & Hotels sector, with an Outlook of -5%, and in both the Manufacturing sector and the Construction sector, where Outlooks stand at -4%. Meanwhile, some job gains are expected in four sectors, most notably the Public & Social sector and the Transport, Storage & Communication sector, both with Outlooks of +8%.

Quarter-over-quarter, the Outlook strengthens in five of the 10 industry sectors. The Outlook for the Public & Social sector is 5 percentage points stronger and an increase of 4 percentage points is reported in the Transport, Storage & Communication sector. However, employers report weaker hiring plans in four industry sectors. Outlooks decline by 9 percentage points in both the Electricity, Gas & Water Supply sector and the

Restaurants & Hotels sector. Mining & Quarrying sector employers report a decrease of 8 percentage points.

When compared with 2Q 2012, hiring intentions weaken in eight of the 10 industry sectors. Mining & Quarrying sector employers report a steep decline of 25 percentage points and the Outlook for the Restaurants & Hotels sector weakens by 20 percentage points. In the Construction sector, the Outlook declines by 17 percentage points and decreases of 9 and 7 percentage points are reported in the Electricity, Gas & Water Supply sector and the Finance, Insurance, Real Estate & Business Services sector, respectively. Elsewhere, hiring plans improve by 9 percentage points in the Agriculture, Hunting, Forestry & Fishing sector and by 5 percentage points in the Public & Social sector.

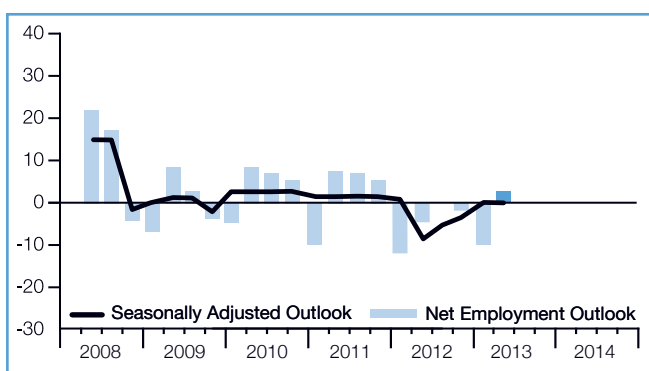
Based on unadjusted survey data, employers forecast headcount growth in five of the 10 industry sectors during the upcoming quarter, with the strongest labor market expected in the Wholesale & Retail Trade sector. Quarter-over-quarter, hiring prospects improve in seven sectors, but the Outlook declines in seven sectors when compared with 2Q 2012.



## Agriculture, Hunting, Forestry & Fishing 0%

Job seekers are likely to continue to face a flat labor market in 2Q 2013, according to employers who report a Net Employment Outlook of 0%. Hiring prospects are unchanged when compared with the previous quarter and improve by 9 percentage points year-over-year.

Based on unadjusted survey data, some job gains are forecast for the coming quarter. The Outlook is considerably stronger quarter-over-quarter and improves moderately year-over-year.

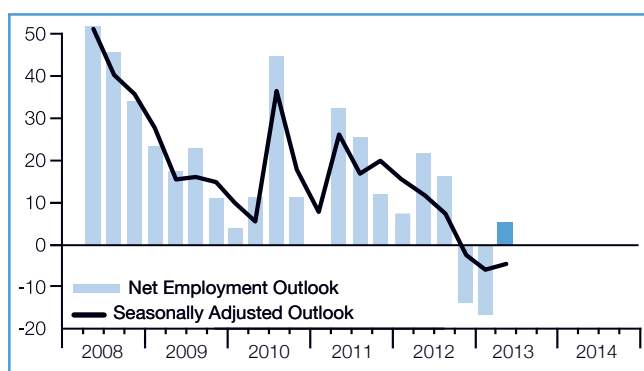


No bar indicates Net Employment Outlook of zero.

## Construction -4%

With a Net Employment Outlook for the April-June time frame of -4%, employers report the third consecutive negative forecast for the sector. While the Outlook is 2 percentage points stronger quarter-over-quarter, hiring intentions weaken by a considerable margin of 17 percentage points year-over-year.

Based on unadjusted survey data, employers anticipate some hiring opportunities in the next three months. The Outlook improves sharply when compared with the previous quarter but is considerably weaker year-over-year.

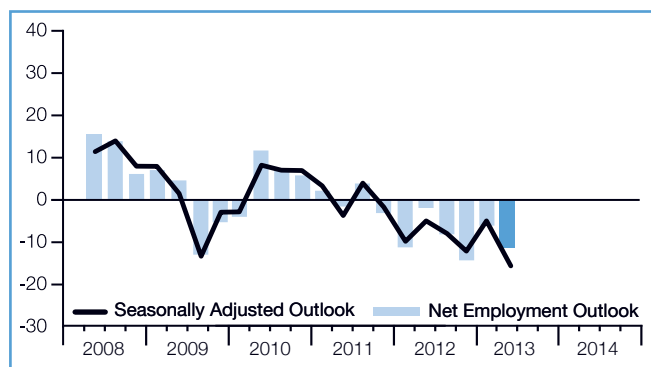


No bar indicates Net Employment Outlook of zero.

## Electricity, Gas & Water -14%

Employers report the weakest hiring intentions since the survey began in 2Q 2008, with a Net Employment Outlook of -14% for the coming quarter. The Outlook has now been negative for the last seven consecutive quarters. Hiring prospects weaken by 9 percentage points both quarter-over-quarter and year-over-year.

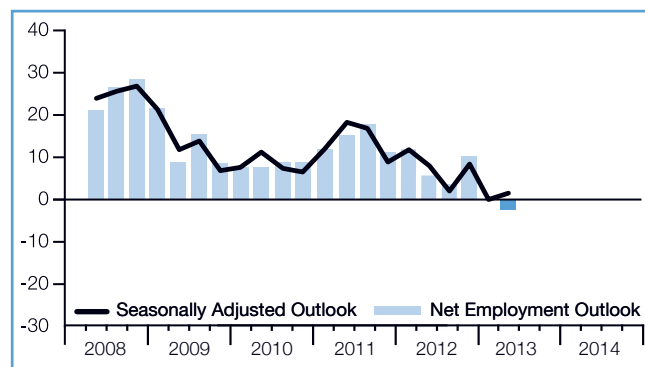
Based on unadjusted survey data, employers forecast a gloomy hiring climate in the April-June time frame. The Outlook is moderately weaker quarter-over-quarter and declines considerably when compared with 2Q 2012.



## Finance, Insurance, Real Estate & Business Services +1%

A quiet labor market is anticipated in the coming quarter, with employers reporting a Net Employment Outlook of +1%. The Outlook remains relatively stable quarter-over-quarter but declines by 7 percentage points year-over-year.

Based on unadjusted survey data, employers report uncertain hiring prospects for the next three months. The Outlook weakens slightly when compared with the previous quarter and declines moderately year-over-year.



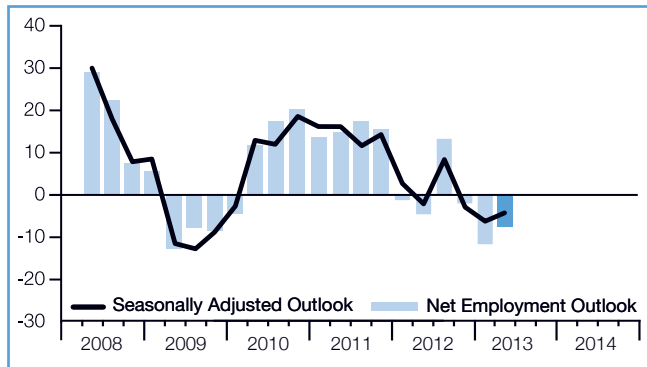
No bar indicates Net Employment Outlook of zero.



## Manufacturing -4%

Employers report downbeat hiring plans for the coming quarter with a Net Employment Outlook of -4%, and hiring prospects in the sector have now been negative in four of the last five quarters. The Outlook improves by 2 percentage points quarter-over-quarter but declines by 2 percentage points year-over-year.

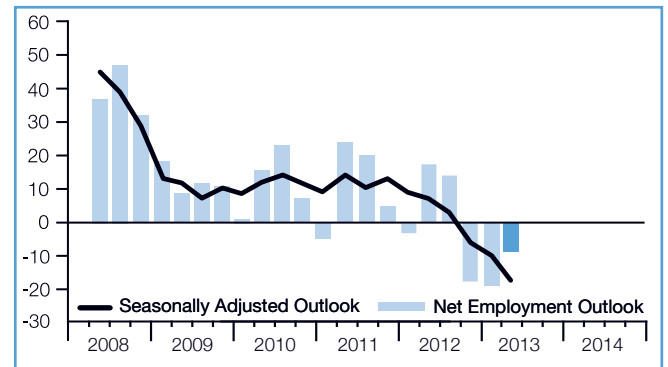
Based on unadjusted survey data, employers anticipate a sluggish hiring pace in 2Q 2013. The Outlook is slightly stronger quarter-over-quarter but slightly weaker year-over-year.



## Mining & Quarrying -18%

Job seekers in 2Q 2013 are likely to face the weakest hiring climate since the survey began in 2Q 2008, according to employers who report a Net Employment Outlook of -18%. The Outlook has now been steadily declining for six consecutive quarters. Quarter-over-quarter, the Outlook declines by 8 percentage points and by 25 percentage points year-over-year.

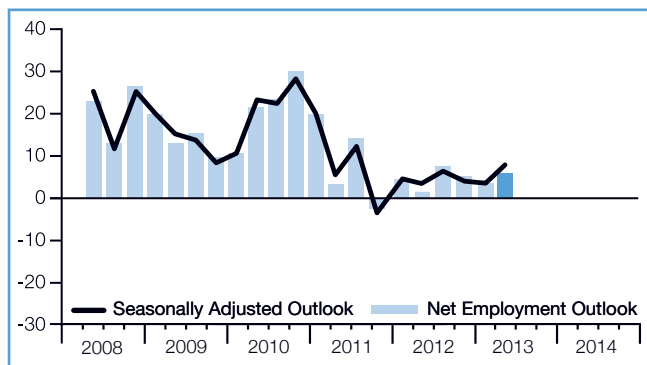
Based on unadjusted survey data, employers expect the labor market slump to continue in 2Q 2013, despite a considerable quarter-over-quarter improvement in the Outlook. Year-over-year, the Outlook weakens by a steep margin.



## Public & Social +8%

Employers report encouraging signs for job seekers in the April-June time frame with a Net Employment Outlook of +8%. Hiring prospects improve by 5 percentage points both quarter-over-quarter and year-over-year.

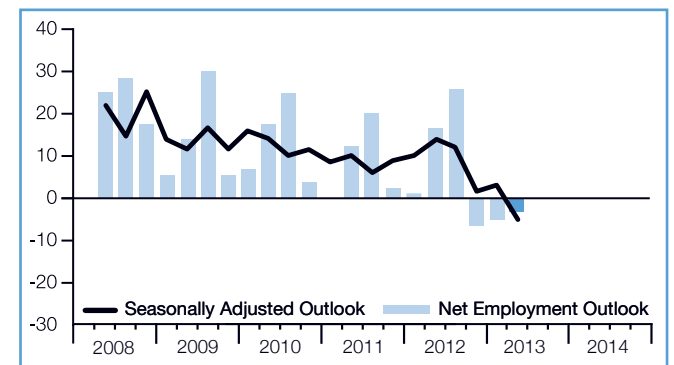
Based on unadjusted survey data, employers expect a conservative hiring pace in the coming quarter. The Outlook is slightly stronger quarter-over-quarter and also improves moderately year-over-year.



## Restaurants & Hotels -5%

With a Net Employment Outlook of -5% for 2Q 2013, employers report the weakest – and first negative – hiring intentions since the survey began in 2Q 2008. Hiring prospects are considerably weaker both quarter-over-quarter and year-over-year, with the Outlook declining by 9 and 20 percentage points, respectively.

Based on unadjusted survey data, employers expect limited hiring prospects for the coming quarter. Hiring plans are slightly stronger when compared with 1Q 2013, but the Outlook weakens considerably year-over-year.

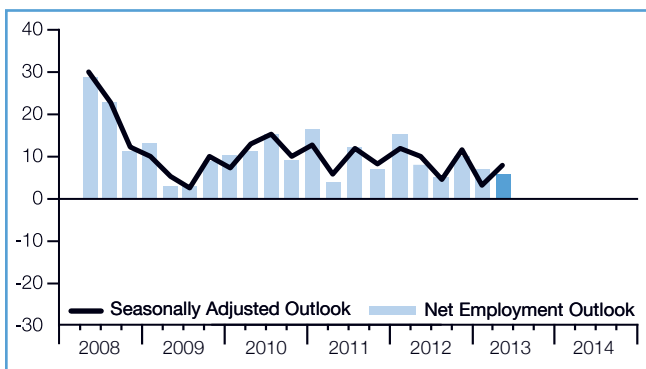


No bar indicates Net Employment Outlook of zero.

## Transport, Storage & Communication +8%

Some opportunities to increase staffing levels are anticipated in 2Q 2013, with employers reporting a Net Employment Outlook of +8%. Hiring intentions strengthen by 4 percentage points quarter-over-quarter but decline by 2 percentage points year-over-year.

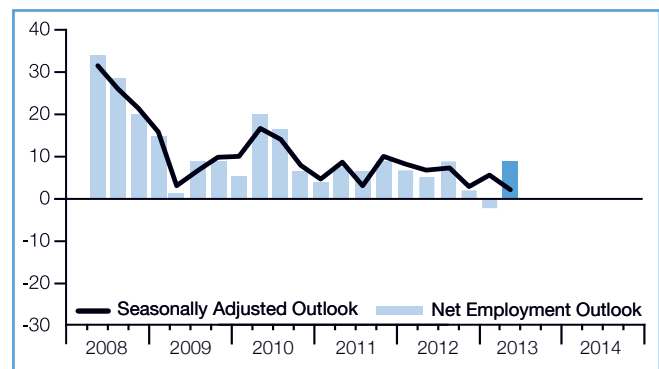
Based on unadjusted survey data, employers anticipate modest payroll gains in the next three months. The Outlook remains relatively stable quarter-over-quarter but declines slightly when compared with 2Q 2012.



## Wholesale & Retail Trade +2%

Employers forecast slow-paced hiring activity in the April-June time frame, reporting a Net Employment Outlook of +2%. However, hiring prospects decline by 4 percentage points both quarter-over-quarter and year-over-year, and the Outlook equals the weakest forecast since the survey began in 2Q 2008 (last reported in 2Q 2009).

Based on unadjusted survey data, employers report cautiously optimistic hiring plans for the coming quarter. The Outlook is considerably stronger quarter-over-quarter and also improves slightly year-over-year.



# Global Employment Outlook

	Net Employment Outlook			Qtr on Qtr Change	Yr on Yr Change
	Quarter 2 2012	Quarter 1 2013	Quarter 2 2013	Q1 2013 to Q2 2013	Q2 2012 to Q2 2013
	%	%	%		
<b>Americas</b>					
Argentina	15 (13) <sup>1</sup>	11 (10) <sup>1</sup>	16 (14) <sup>1</sup>	5 (4) <sup>1</sup>	1 (1) <sup>1</sup>
Brazil	39	21	30	9	-9
Canada	16 (13) <sup>1</sup>	6 (13) <sup>1</sup>	15 (12) <sup>1</sup>	9 (-1) <sup>1</sup>	-1 (-1) <sup>1</sup>
Colombia	18 (18) <sup>1</sup>	15 (18) <sup>1</sup>	16 (16) <sup>1</sup>	1 (-2) <sup>1</sup>	-2 (-2) <sup>1</sup>
Costa Rica	14 (17) <sup>1</sup>	15 (16) <sup>1</sup>	13 (11) <sup>1</sup>	-2 (-5) <sup>1</sup>	-1 (-6) <sup>1</sup>
Guatemala	13 (14) <sup>1</sup>	17 (15) <sup>1</sup>	12 (13) <sup>1</sup>	-5 (-2) <sup>1</sup>	-1 (-1) <sup>1</sup>
Mexico	15 (15) <sup>1</sup>	18 (18) <sup>1</sup>	18 (18) <sup>1</sup>	0 (0) <sup>1</sup>	3 (3) <sup>1</sup>
Panama	16	18	25	7	9
Peru	23 (25) <sup>1</sup>	16 (15) <sup>1</sup>	17 (19) <sup>1</sup>	1 (4) <sup>1</sup>	-6 (-6) <sup>1</sup>
United States	12 (10) <sup>1</sup>	9 (12) <sup>1</sup>	13 (11) <sup>1</sup>	4 (-1) <sup>1</sup>	1 (1) <sup>1</sup>

<b>Asia Pacific</b>					
Australia	13 (12) <sup>1</sup>	7 (9) <sup>1</sup>	8 (4) <sup>1</sup>	1 (-5) <sup>1</sup>	-5 (-8) <sup>1</sup>
China	19 (19) <sup>1</sup>	14 (15) <sup>1</sup>	18 (18) <sup>1</sup>	4 (3) <sup>1</sup>	-1 (-1) <sup>1</sup>
Hong Kong	8 (9) <sup>1</sup>	12 (12) <sup>1</sup>	9 (10) <sup>1</sup>	-3 (-2) <sup>1</sup>	1 (1) <sup>1</sup>
India	48 (46) <sup>1</sup>	23 (25) <sup>1</sup>	30 (27) <sup>1</sup>	7 (2) <sup>1</sup>	-18 (-19) <sup>1</sup>
Japan	23 (11) <sup>1</sup>	6 (11) <sup>1</sup>	23 (11) <sup>1</sup>	17 (0) <sup>1</sup>	0 (0) <sup>1</sup>
New Zealand	18 (18) <sup>1</sup>	15 (18) <sup>1</sup>	23 (21) <sup>1</sup>	8 (3) <sup>1</sup>	5 (3) <sup>1</sup>
Singapore	20 (20) <sup>1</sup>	10 (12) <sup>1</sup>	17 (17) <sup>1</sup>	7 (5) <sup>1</sup>	-3 (-3) <sup>1</sup>
Taiwan	36 (33) <sup>1</sup>	26 (33) <sup>1</sup>	33 (30) <sup>1</sup>	7 (-3) <sup>1</sup>	-3 (-3) <sup>1</sup>

<b>EMEA*</b>					
Austria	8 (6) <sup>1</sup>	-1 (4) <sup>1</sup>	4 (2) <sup>1</sup>	5 (-2) <sup>1</sup>	-4 (-4) <sup>1</sup>
Belgium	4 (3) <sup>1</sup>	0 (1) <sup>1</sup>	-1 (-2) <sup>1</sup>	-1 (-3) <sup>1</sup>	-5 (-5) <sup>1</sup>
Bulgaria	8	-4	12	16	4
Czech Republic	-3 (-4) <sup>1</sup>	-8 (-4) <sup>1</sup>	0 (-1) <sup>1</sup>	8 (3) <sup>1</sup>	3 (3) <sup>1</sup>
Finland	-	4	2	-2	-
France	2 (2) <sup>1</sup>	-2 (0) <sup>1</sup>	0 (1) <sup>1</sup>	2 (1) <sup>1</sup>	-2 (-1) <sup>1</sup>
Germany	7 (7) <sup>1</sup>	5 (7) <sup>1</sup>	4 (4) <sup>1</sup>	-1 (-3) <sup>1</sup>	-3 (-3) <sup>1</sup>
Greece	-11 (-13) <sup>1</sup>	-16 (-10) <sup>1</sup>	-3 (-6) <sup>1</sup>	13 (4) <sup>1</sup>	8 (7) <sup>1</sup>
Hungary	-3	-2	5	7	8
Ireland	-3 (-3) <sup>1</sup>	-8 (-5) <sup>1</sup>	-2 (-2) <sup>1</sup>	6 (3) <sup>1</sup>	1 (1) <sup>1</sup>
Israel	17	10	13	3	-4
Italy	-1 (-2) <sup>1</sup>	-12 (-11) <sup>1</sup>	-10 (-11) <sup>1</sup>	2 (0) <sup>1</sup>	-9 (-9) <sup>1</sup>
Netherlands	0 (0) <sup>1</sup>	-7 (-7) <sup>1</sup>	-5 (-3) <sup>1</sup>	2 (4) <sup>1</sup>	-5 (-3) <sup>1</sup>
Norway	8 (9) <sup>1</sup>	5 (6) <sup>1</sup>	6 (6) <sup>1</sup>	1 (0) <sup>1</sup>	-2 (-3) <sup>1</sup>
<b>Poland</b>	<b>6 (4)<sup>1</sup></b>	<b>-6 (-1)<sup>1</sup></b>	<b>0 (-2)<sup>1</sup></b>	<b>6 (-1)<sup>1</sup></b>	<b>-6 (-6)<sup>1</sup></b>
Romania	9 (11) <sup>1</sup>	3 (11) <sup>1</sup>	11 (13) <sup>1</sup>	8 (2) <sup>1</sup>	2 (2) <sup>1</sup>
Slovakia	2	-8	1	9	-1
Slovenia	9	-9	5	14	-4
South Africa	0 (-2) <sup>1</sup>	1 (-1) <sup>1</sup>	2 (0) <sup>1</sup>	1 (1) <sup>1</sup>	2 (2) <sup>1</sup>
Spain	-8 (-8) <sup>1</sup>	-13 (-11) <sup>1</sup>	-11 (-11) <sup>1</sup>	2 (0) <sup>1</sup>	-3 (-3) <sup>1</sup>
Sweden	11 (9) <sup>1</sup>	2 (6) <sup>1</sup>	6 (4) <sup>1</sup>	4 (-2) <sup>1</sup>	-5 (-5) <sup>1</sup>
Switzerland	2 (0) <sup>1</sup>	1 (1) <sup>1</sup>	0 (-2) <sup>1</sup>	-1 (-3) <sup>1</sup>	-2 (-2) <sup>1</sup>
Turkey	26	10	28	18	2
UK	2 (2) <sup>1</sup>	4 (6) <sup>1</sup>	6 (6) <sup>1</sup>	2 (0) <sup>1</sup>	4 (4) <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 16 quarters worth of data is required.

ManpowerGroup interviewed over 66,000 hiring managers across 42 countries and territories to measure employer hiring expectations for Q2 2013.

The Manpower Employment Outlook Survey is ManpowerGroup's quarterly index of employer hiring confidence. For the second-quarter research, all participants were asked, "How do you anticipate total employment at your location to change in the three months to the end of June 2013 as compared to the current quarter?"

The latest research reveals uncertainty still weighs on employer confidence across the globe. Net Employment Outlooks are mixed and it appears many hiring managers continue to wait for clearer resolution to Europe's sovereign debt crisis as well as signs that the global economy is returning to firmer footing before labor markets are likely to achieve sustainable traction. Employers in more than three-quarters of the labor markets surveyed report positive second-quarter hiring plans. Hiring plans strengthen quarter-over-quarter in 21 countries and territories, but decline by varying degrees in 15. Additionally, employers in 25 countries and territories report weaker forecasts compared to this time last year.

Worldwide, hiring expectations are strongest in Brazil, Taiwan, Turkey and India, and weakest in Italy, Spain, Greece and the Netherlands with Outlooks from Italy and Spain matching the weakest employer forecasts ever reported there.

The research reveals that the least optimistic second-quarter forecasts prevail across the Europe, Middle East and Africa (EMEA) region where employers in nine of 24 countries report negative second-quarter Net Employment Outlooks. However, the number of negative forecasts in the April-June time frame is a clear improvement from the prior quarter when negative hiring plans were reported in 13 countries.

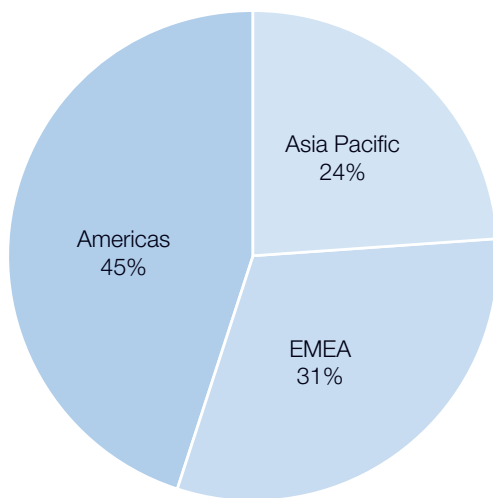
Employers remain cautiously optimistic in the United Kingdom where job seekers will likely continue benefitting from an encouraging hiring environment through the end of June. The labor market remains resilient in Norway as employers in all sectors add to their payrolls, encouraged by the strength of activity associated with the country's oil industry. Germany's Outlook also remains positive, but employer hiring plans are slightly more modest than they were in both the prior quarter and last year at this time.

In the Asia Pacific region, employer hiring intentions are positive but mixed. The hiring pace is expected to remain strong in Taiwan, propelled by robust hiring activity in the Mining & Construction industry sector. And opportunities for job seekers in India are expected to remain solid with particularly bright prospects reported in the Transportation & Utilities sector where the Outlook improves by a considerable margin from the first three months of the year. Prospects for job seekers in mainland China are expected to remain favorable, while Japan's employers anticipate steady employment gains for the fifth consecutive quarter. Meanwhile, employer confidence in Australia has declined steadily for the last two years and the country's Net Employment Outlook now stands at its weakest level since Q3 2009.

Employers from all 10 countries in the Americas report positive second-quarter hiring plans. Job prospects are strongest in Brazil and Panama and weakest in Costa Rica and the United States. Mexico's Outlook remains upbeat and matches the strongest jobs forecast reported in the country since Q3 2008. Meanwhile, employers in Canada and the United States continue to expect steady job growth in the next three months and Outlooks in both countries remain relatively stable in both quarter-over-quarter and year-over-year comparisons.

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

## Survey Respondents by Region



Research for the Quarter 2 2013 Manpower Employment Outlook Survey involved surveying 66,006 human resources directors and senior hiring managers from public and private organizations worldwide. 45% of respondents come from 10 countries in the Americas; 24% from eight countries and territories across Asia Pacific; and 31% from 24 countries in EMEA.

## International Comparisons – Americas

Nearly 30,000 employers from 10 countries in North, Central and South America participated in the research to measure expected hiring activity in the second quarter of 2013.

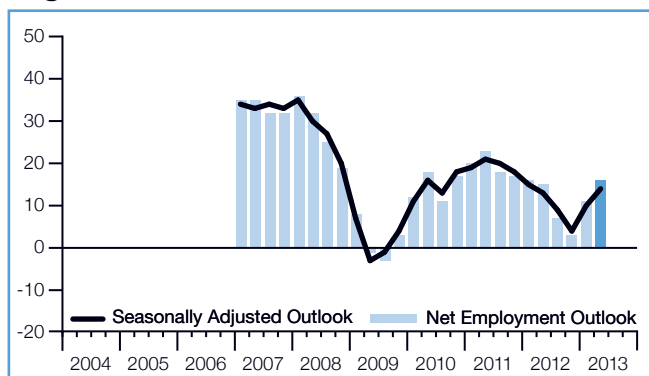
Employers in all countries report positive hiring expectations for the April-June time frame, and Outlooks improve or remain relatively stable in seven of 10 countries quarter-over-quarter. In a year-over-year comparison, job prospects decline or maintain relative stability in eight of 10 countries. Job prospects are strongest in Brazil, Panama and Peru. Opportunities for job seekers are expected to be weakest in Costa Rica and the United States, however hiring in both countries is expected to continue at a stable pace with U.S. job prospects boosted by a surge in demand in the Construction sector and by considerably stronger demand by employers in the Transportation & Public Utilities and the Non-Durable Manufacturing sectors.

Brazil's employers have reversed the declines reported in the three prior quarters; the second-quarter hiring pace is expected to be brisk as organizations throughout the country continue preparations for next year's soccer World Cup and the 2016 Olympic Games. Hiring expectations in the Construction and the Finance, Insurance & Real Estate sectors climb sharply

quarter-over-quarter, and job seekers can also expect to benefit from a prosperous hiring climate in the Services and the Transportation & Utilities sectors. Argentina's forecast climbs modestly for the second consecutive quarter, despite uncertainties arising from the government's efforts to curb inflation and stabilize currency. In Colombia, Outlooks are mostly weaker year-over-year, but a number of planned infrastructure projects are about to get underway and these projects are supporting optimism in the Services sector, as well as upbeat forecasts in the Construction and Transportation & Utilities sectors.

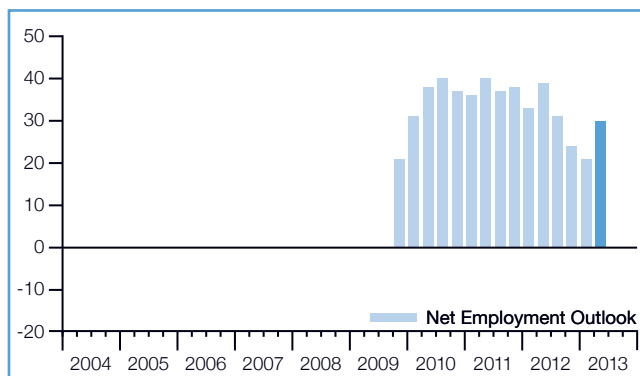
In Mexico, the hiring environment is expected to remain decidedly upbeat, fueled by unprecedented confidence among employers in the Services and Commerce sectors combined with favorable hiring plans in each of the country's seven regions. Hiring plans among Canadian employers remain steady, highlighted by the strongest Outlook in the Transportation & Public Utilities sector since Q2 2007 and continuing steady demand in the Construction sector. However, in response to ongoing talent shortages in healthcare, mining and advanced business services, the government is exploring ways to expedite the entry of foreign workers whose skills are in demand.

## Argentina



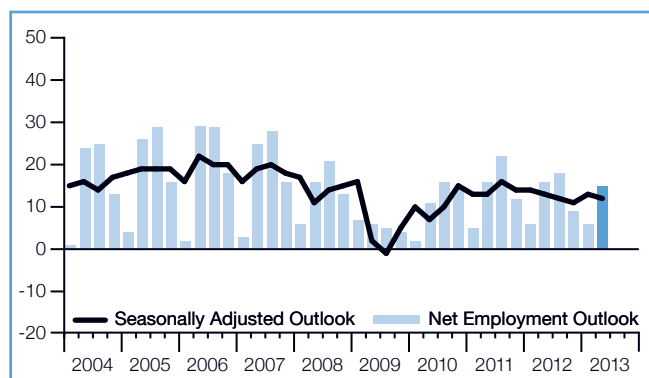
Argentina joined the survey in Q1 2007.

## Brazil

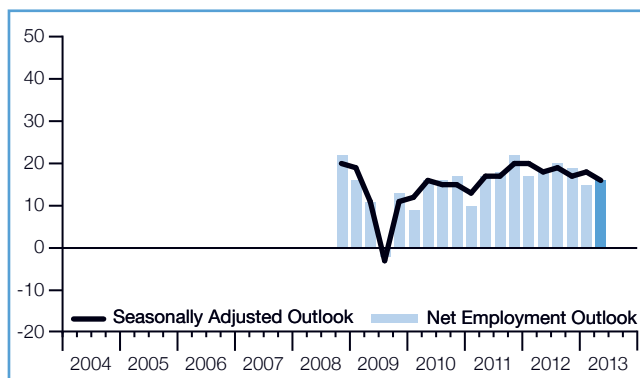


Brazil joined the survey in Q4 2009.

## Canada

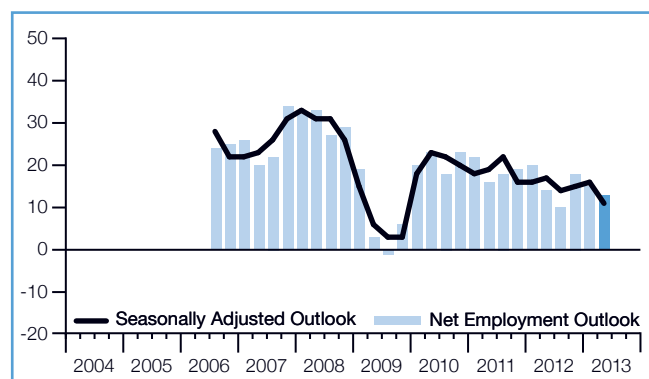


## Colombia



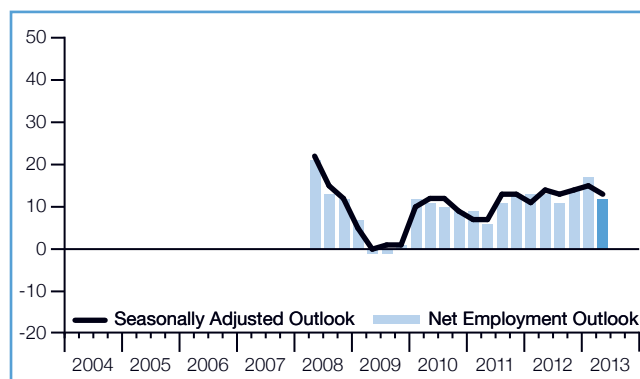
Colombia joined the survey in Q4 2008.

## Costa Rica



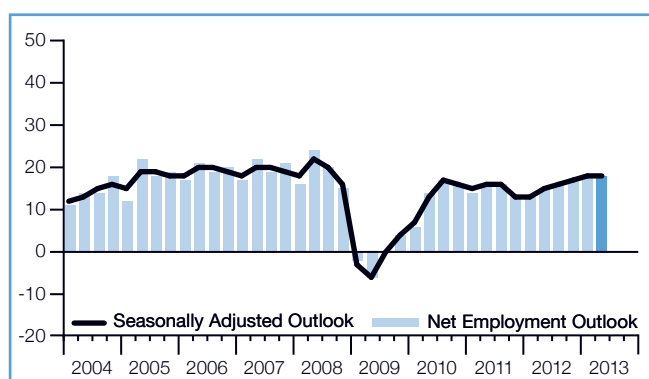
Costa Rica joined the survey in Q3 2006.

## Guatemala



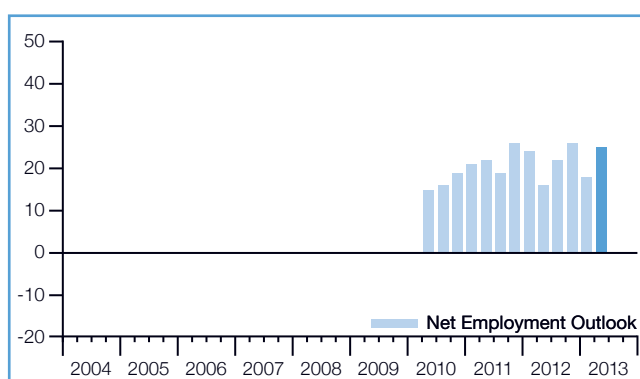
Guatemala joined the survey in Q2 2008.

## Mexico



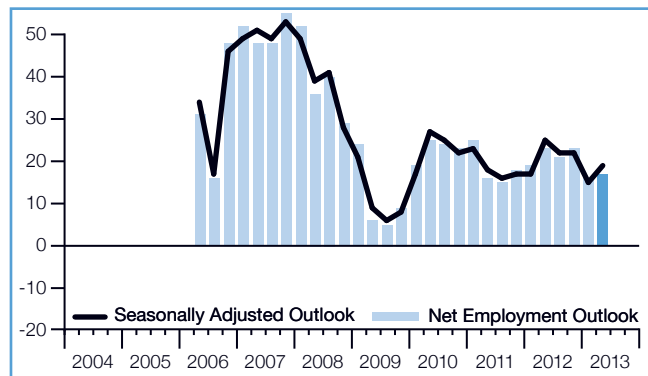
No bar indicates Net Employment Outlook of zero.

## Panama

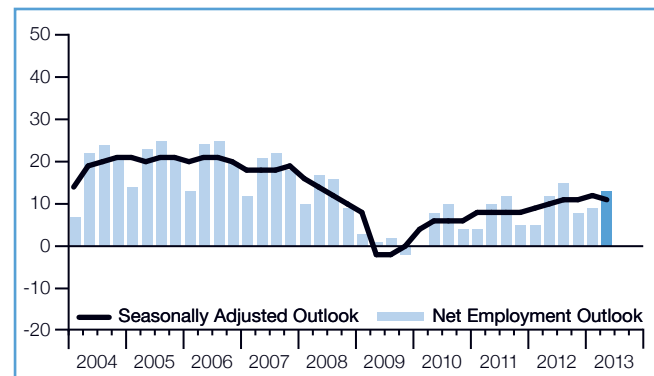


Panama joined the survey in Q2 2010.

## Peru



## United States



## International Comparisons – Asia Pacific

ManpowerGroup interviewed over 16,000 employers to measure second-quarter hiring plans across eight countries and territories in the Asia Pacific region. Hiring expectations remain positive throughout the region with the strongest opportunities for job seekers reported by employers in Taiwan and India. For the fourth consecutive quarter, employers in Australia report the region's weakest hiring plans.

In a quarter-over-quarter comparison the Outlooks are mixed with job prospects expected to improve in four of the eight countries and territories. However, when compared to this time last year, employers are decidedly more uncertain with Net Employment Outlooks declining or remaining relatively stable in seven of the eight countries and territories surveyed.

Hiring plans in Taiwan are slightly weaker than they were in Q1 2013 and last year at this time, but employers here are anticipating a brisk hiring pace in the next three months fueled by demand in the Mining & Construction sector where more than half of the employers surveyed said they planned to add to their payrolls in the second quarter. The research reveals bright prospects also await job seekers in the Services sector.

Opportunities for job seekers are expected to improve slightly from the prior quarter in both India and China, but are unchanged in Japan.

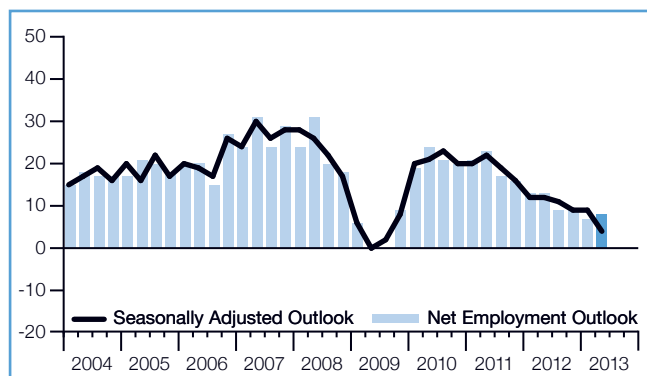
In India, employer confidence improves slightly for the second consecutive quarter following the lackluster forecasts of Q4 2012. Outlooks improve in virtually every sector and region in a quarter-over-quarter comparison,

but remain broadly weaker than last year at this time. Strong hiring plans are reported by employers throughout the country with the strongest opportunities expected to benefit job seekers in the Transportation & Utilities, Services, and the Wholesale & Retail Trade sectors.

Employers in each of China's six surveyed industry sectors and nine regions expect the hiring pace to improve by varying degrees when compared to Q1 2013 but report broadly similar hiring plans to last year at this time. The most active hiring environments are expected in the Services and the Wholesale & Retail Trade sectors. In Japan, meanwhile, job seekers can expect the busiest labor markets in the Services and the Transportation & Utilities sectors where Outlooks strengthen considerably year-over-year.

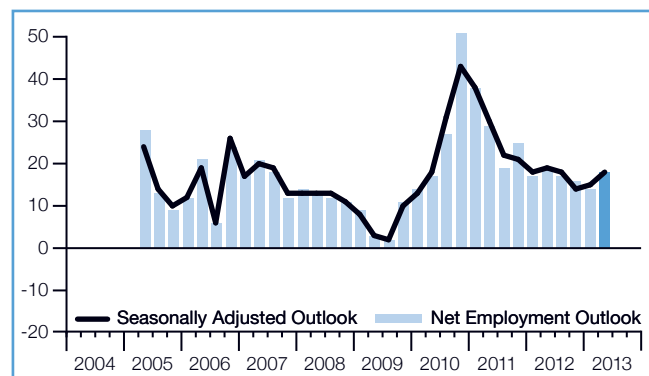
Meanwhile, the Australian Outlook has been in a steady state of decline for the previous eight quarters and is now weaker than at any point since Q3 2009. The decline is plainly evident in the Mining & Construction sector where opportunities for job seekers are considerably more modest than they have been over the last few years.

## Australia



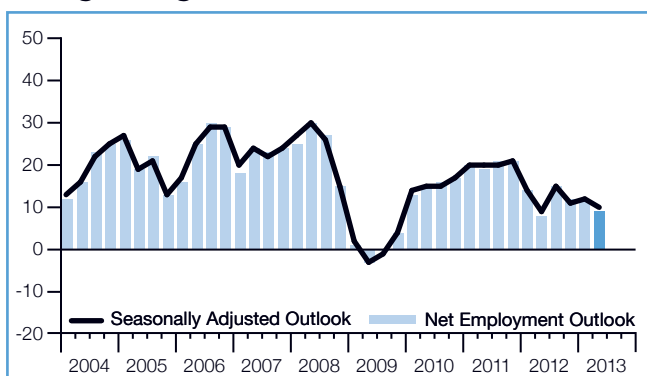
No bar indicates Net Employment Outlook of zero.

## China



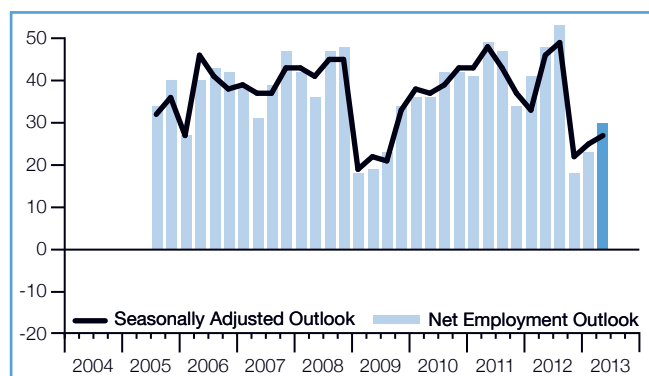
China joined the survey in Q2 2005.

## Hong Kong



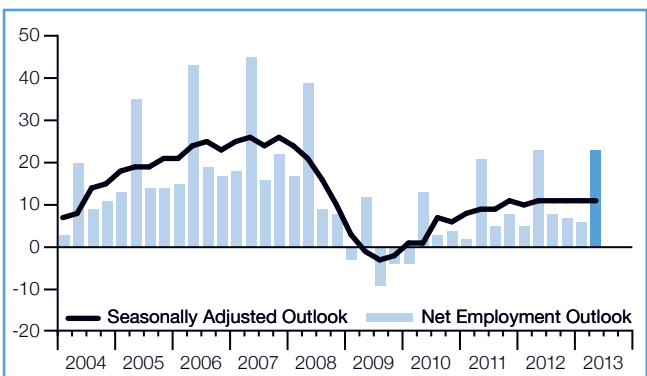
No bar indicates Net Employment Outlook of zero.

## India

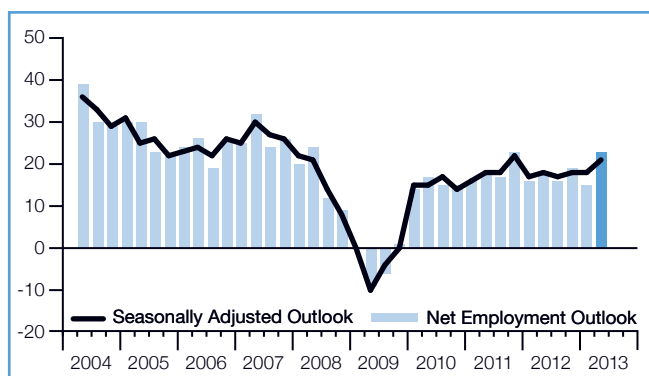


India joined the survey in Q3 2005.

## Japan

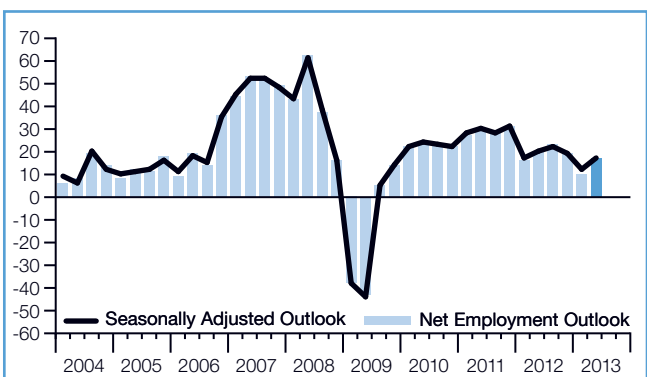


## New Zealand

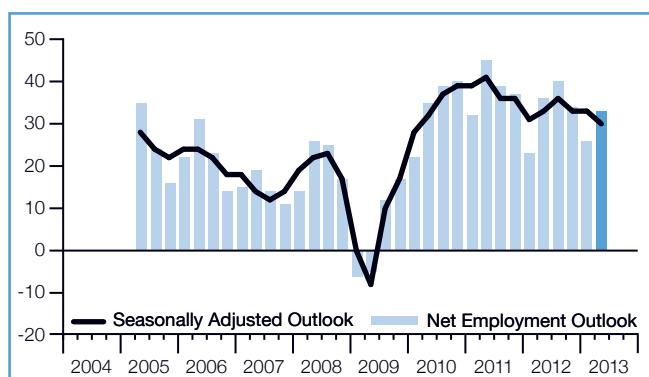


New Zealand joined the survey in Q2 2004.  
No bar indicates Net Employment Outlook of zero.

## Singapore



## Taiwan



Taiwan joined the survey in Q2 2005.



## International Comparisons – EMEA

ManpowerGroup interviewed more than 20,000 employers across 24 countries in the Europe, Middle East and Africa (EMEA) region to gauge anticipated hiring activity in the April-June time frame of 2013. Hiring plans are positive in 14 of 24 countries with Outlooks improving or remaining relatively stable from three months ago in 18 labor markets. However, a year-over-year comparison indicates that broad uncertainty across the region continues to weigh on employer hiring confidence and the second-quarter hiring pace is expected to strengthen or remain relatively stable in only 11 of the countries surveyed. The strongest job prospects in the region are reported in Turkey, Israel and Romania and weakest in Italy, Spain and Greece.

Employers in Turkey report the region's most optimistic hiring intentions with nearly four out of 10 employers planning to add to their payrolls in the next three months. The Outlook improves considerably from a relatively disappointing first-quarter forecast with considerable gains reported by employers in all industry sectors and all regions. Expected labor demand in Turkey is strongest in the Construction sector.

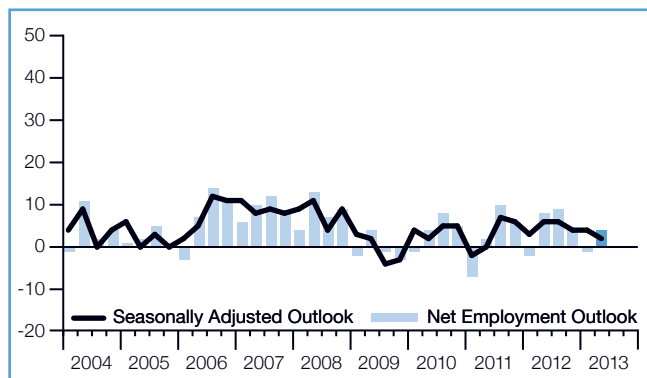
In the United Kingdom employers continue to report their most optimistic forecasts in the last five years. As in the prior two quarters, opportunities for job seekers are expected to be strongest in the Finance & Business Services sector. The overall Outlook is also boosted by

a surge in expectations among employers in the Transport, Storage & Communications sector. However, hiring plans in the Construction sector remain gloomy as employers continue to adjust to additional budget cuts for residential and infrastructure construction projects. Skills shortages in Norway continue to compel many employers to look abroad for the talent they need—particularly engineers and support personnel for the oil sector, healthcare workers and teachers.

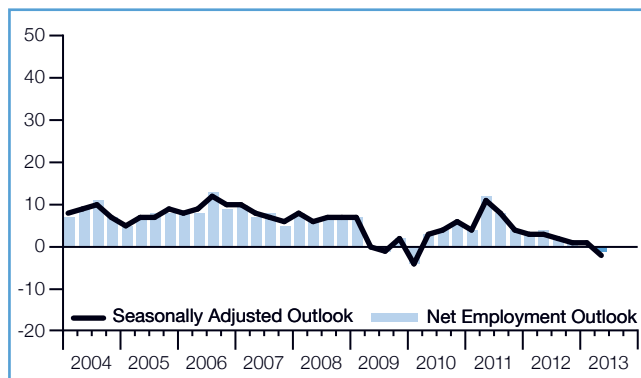
The Outlook in Germany remains positive despite quarter-over-quarter and year-over-year declines in most industry sectors and regions. Employers expect the hiring pace to remain steady in the Finance & Business Services sector, and job seekers in both the Construction and the Electricity, Gas & Water sectors can expect some opportunities in the months ahead. And while Greece's Net Employment Outlook remains negative, employers there report their most optimistic forecast since Q2 2010 with Outlooks improving in a year-over-year comparison by considerable margins in most Greek industry sectors, including the country's Restaurants & Hotels sector where employers report their first positive Outlook in more than two years.

Across Eastern Europe, Net Employment Outlooks are generally stronger in a quarter-over-quarter comparison. The sole exception is Poland where the Outlook declines for the third consecutive quarter following the least optimistic employer forecasts since Poland joined the survey in Q2 2008.

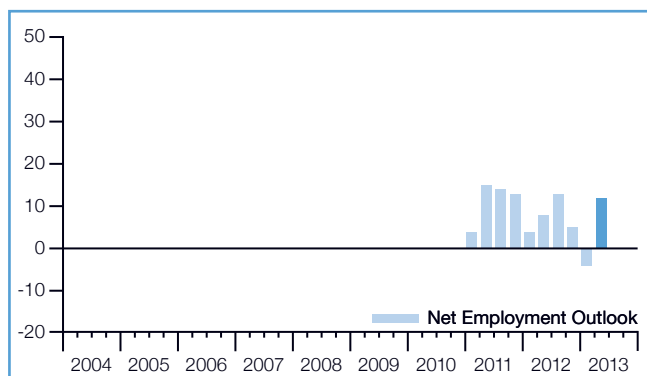
### Austria



### Belgium

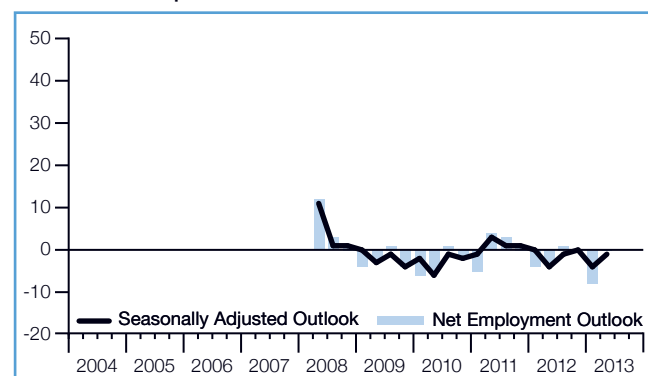


## Bulgaria



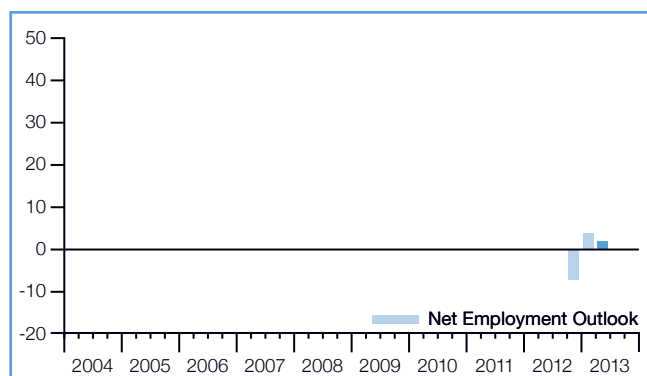
Bulgaria joined the survey in Q1 2011.

## Czech Republic



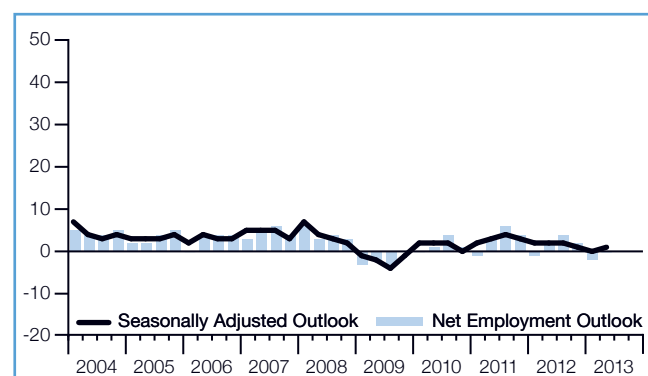
Czech Republic joined the survey in Q2 2008.  
No bar indicates Net Employment Outlook of zero.

## Finland



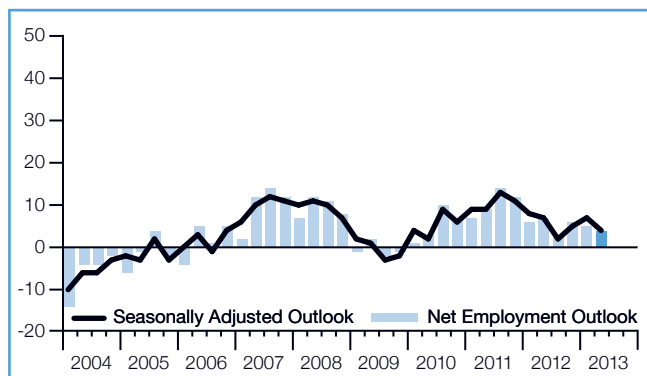
Finland joined the survey in Q4 2012.

## France

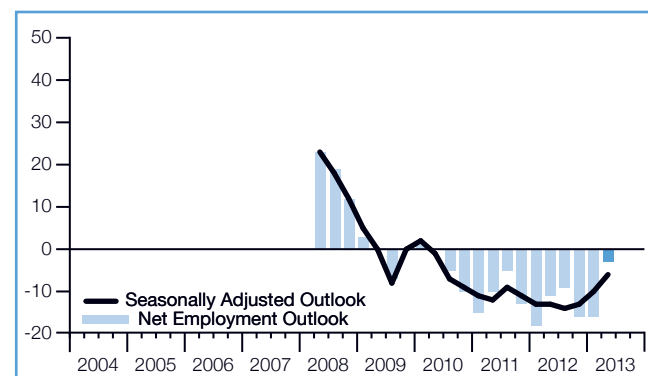


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## Germany

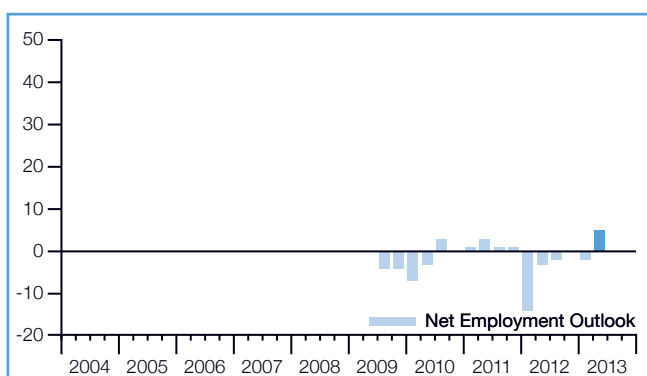


## Greece



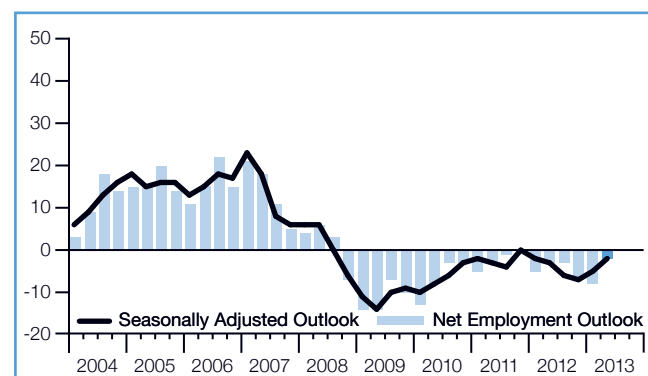
Greece joined the survey in Q2 2008.  
No bar indicates Net Employment Outlook of zero.

## Hungary



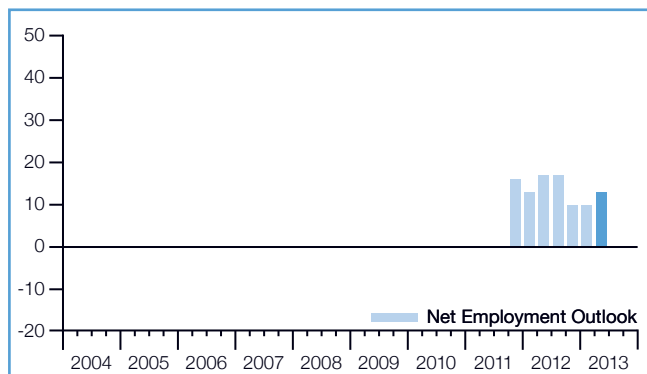
Hungary joined the survey in Q3 2009.  
No bar indicates Net Employment Outlook of zero.

## Ireland

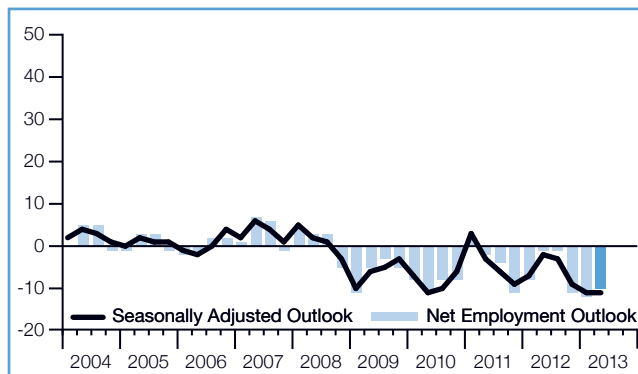


No bar indicates Net Employment Outlook of zero.

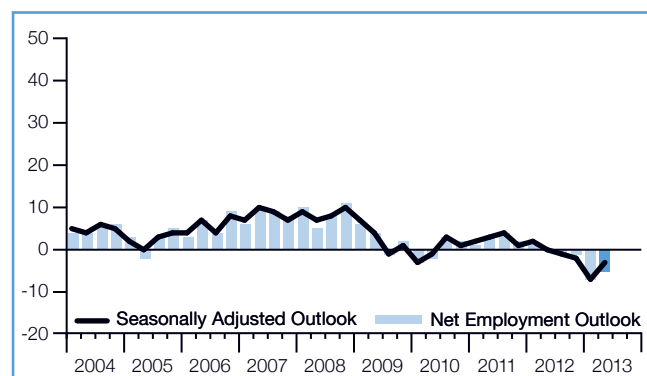
## Israel



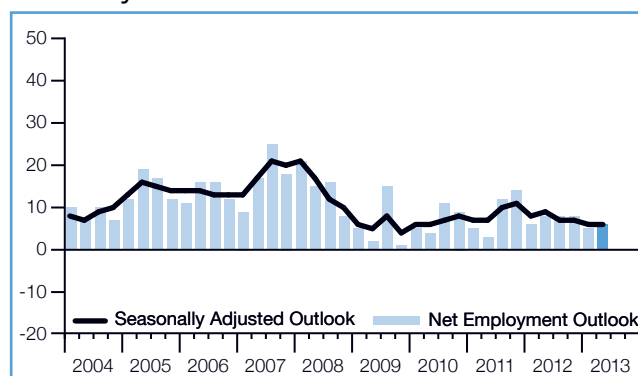
## Italy



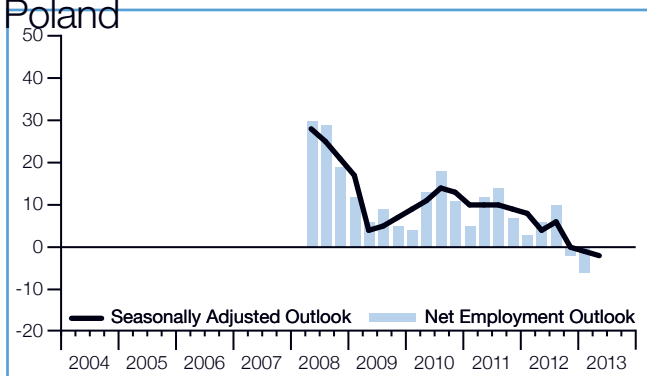
## Netherlands



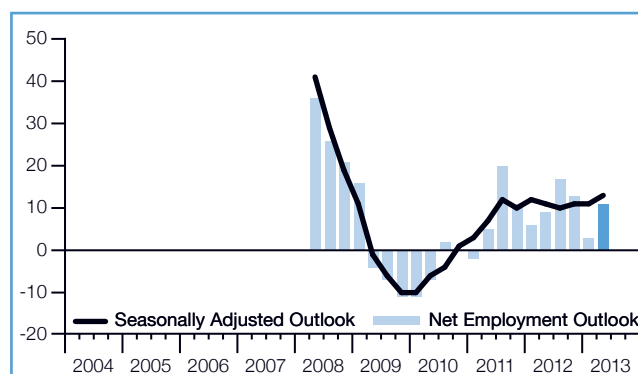
## Norway



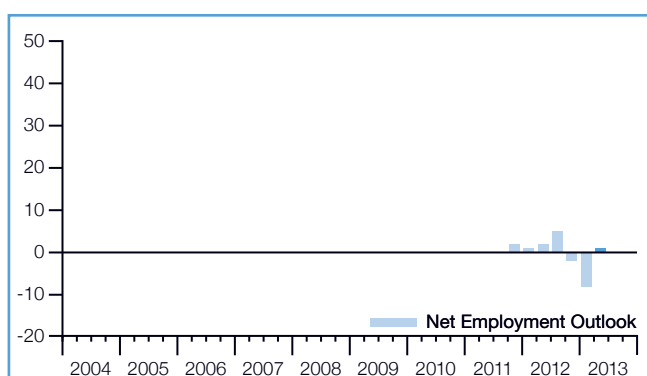
## Poland



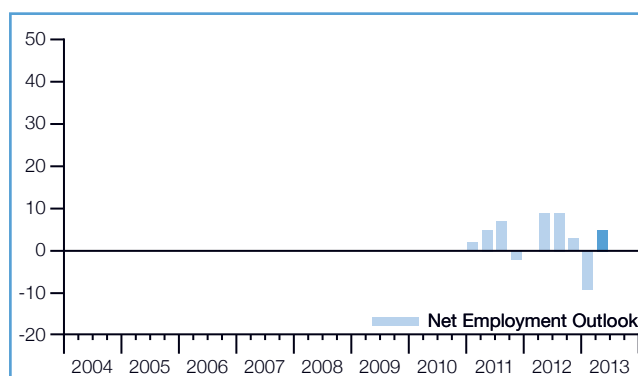
## Romania



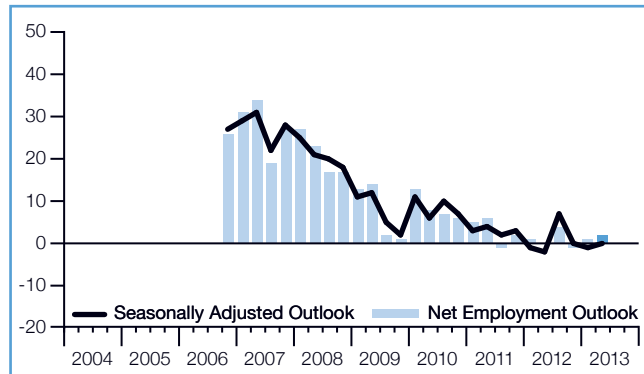
## Slovakia



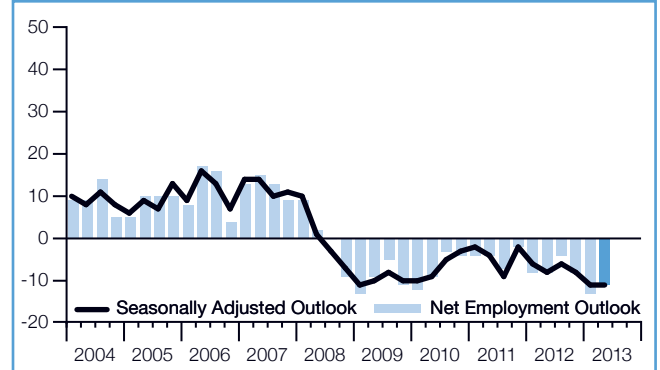
## Slovenia



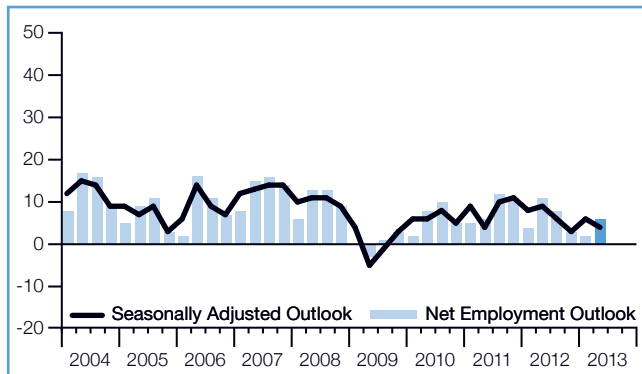
## South Africa



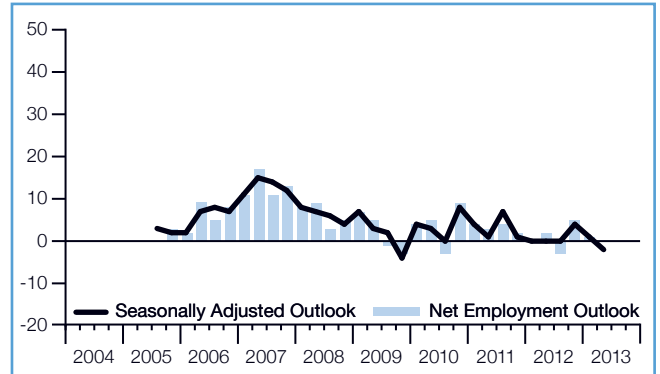
## Spain



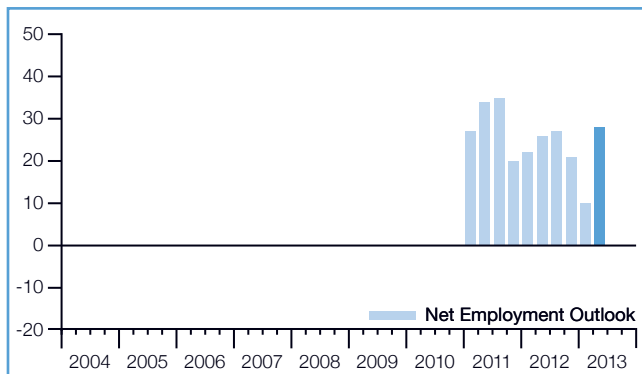
## Sweden



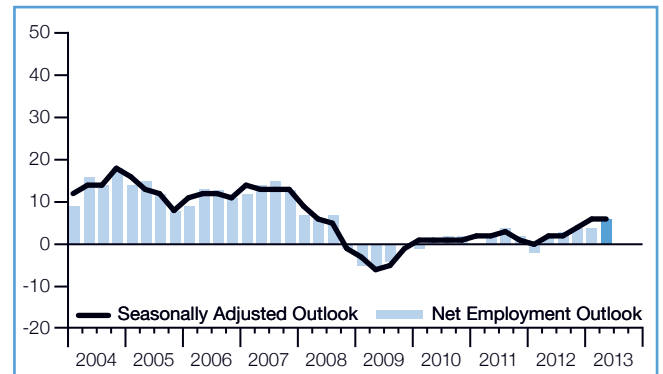
## Switzerland



## Turkey



## UK



## 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 50 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 over 66,000 public and private employers across 42 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 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 June 2013 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 42 countries and territories where the survey is currently conducted includes ManpowerGroup'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 42 countries was conducted between 17th and 29th January 2013.

The Manpower Employment Outlook Survey for Poland is based on interviews with a representative sample of 750 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 Argentina, Australia, Austria, Belgium, Canada, Colombia, Costa Rica, China, the Czech Republic, France, Germany, Greece, Guatemala, Hong Kong, India, Ireland, Italy, Japan, Mexico, Netherlands, New Zealand, Norway, Peru, Poland, Romania, Singapore, South Africa, 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. ManpowerGroup 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, ManpowerGroup 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** ManpowerGroup'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 the Manpower 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** ManpowerGroup United Kingdom's Quarterly Survey of Employment Prospects is updated to adopt an enhanced research methodology. ManpowerGroup'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 and territories 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** ManpowerGroup operations in New Zealand launch the Manpower Employment Outlook Survey.
- 2005** ManpowerGroup operations in China, India, Switzerland, and Taiwan launch the Manpower Employment Outlook Survey.
- 2006** ManpowerGroup 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** ManpowerGroup operations in Argentina join the Manpower Employment Outlook Survey. The survey in New Zealand adds seasonally adjusted data in the first quarter.
- 2008** ManpowerGroup 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** ManpowerGroup operations in Hungary and Brazil launch the Manpower Employment Outlook Survey.
- 2010** ManpowerGroup's Panama operation launches the Manpower Employment Outlook Survey in the second quarter. Peru adds seasonally adjusted data in the second quarter. Costa Rica adds seasonally adjusted data in the first quarter.
- 2011** Beginning in the first quarter, operations in Bulgaria, Slovenia and Turkey join the Manpower Employment Outlook Survey. Additionally, seasonally adjusted data is added in the first quarter for Argentina and South Africa. Israel and Slovakia launch the Manpower Employment Outlook Survey in the fourth quarter.
- 2012** Beginning in the second quarter, ManpowerGroup operations in the Czech Republic, Greece, Guatemala, Poland and Romania initiate reporting of seasonally adjusted data. In the fourth quarter seasonal variations are also removed from Colombian data for the first time. ManpowerGroup's operation in Finland joins the survey in the fourth quarter, expanding the program to 42 countries and territories worldwide.

## About ManpowerGroup™ in Poland

ManpowerGroup, the world leader in innovative workforce solutions, has been helping clients and candidates win in Poland since march 2001. With 40 branches in 25 cities across the nation, ManpowerGroup Poland provides unique value to clients and candidates through ManpowerGroup™ Solutions, Manpower® and Experis™. ManpowerGroup Poland portfolio covers permanent, temporary and contract recruitment; employee assessment and selection; outsourcing, workforce consulting and outplacement. More information on [www.manpowergroup.pl](http://www.manpowergroup.pl).

## About ManpowerGroup™

ManpowerGroup™ (NYSE: MAN), the world leader in innovative workforce solutions, creates and delivers high-impact solutions that enable our clients to achieve their business goals and enhance their competitiveness. With over 60 years of experience, our \$21 billion company creates unique time to value through a comprehensive suite of innovative solutions that help clients win in the Human Age. These solutions cover an entire range of talent-driven needs from recruitment and assessment, training and development, and career management, to outsourcing and workforce consulting. ManpowerGroup maintains the world's largest and industry-leading network of nearly 3,500 offices in 80 countries and territories, generating a dynamic mix of an unmatched global footprint with valuable insight and local expertise to meet the needs of its 400,000 clients per year, across all industry sectors, small and medium-sized enterprises, local, multinational and global companies. By connecting our deep understanding of human potential to the ambitions of clients, ManpowerGroup helps the organizations and individuals we serve achieve more than they imagined — because their success leads to our success. And by creating these powerful connections, we create power that drives organizations forward, accelerates personal success and builds more sustainable communities. We help power the world of work. The ManpowerGroup suite of solutions is offered through ManpowerGroup™ Solutions, Manpower®, Experis™ and Right Management®. Learn more about how ManpowerGroup can help you win in the Human Age at [www.manpowergroup.com](http://www.manpowergroup.com).

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