

ManpowerGroup Employment Outlook Survey **Poland**

A ManpowerGroup Research Report

Q2 2020



ManpowerGroup™

Poland ManpowerGroup Employment Outlook Survey

The ManpowerGroup Employment Outlook Survey for the second quarter 2020 was conducted by interviewing a representative sample of 751 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 2020 as compared to the current quarter?”*.

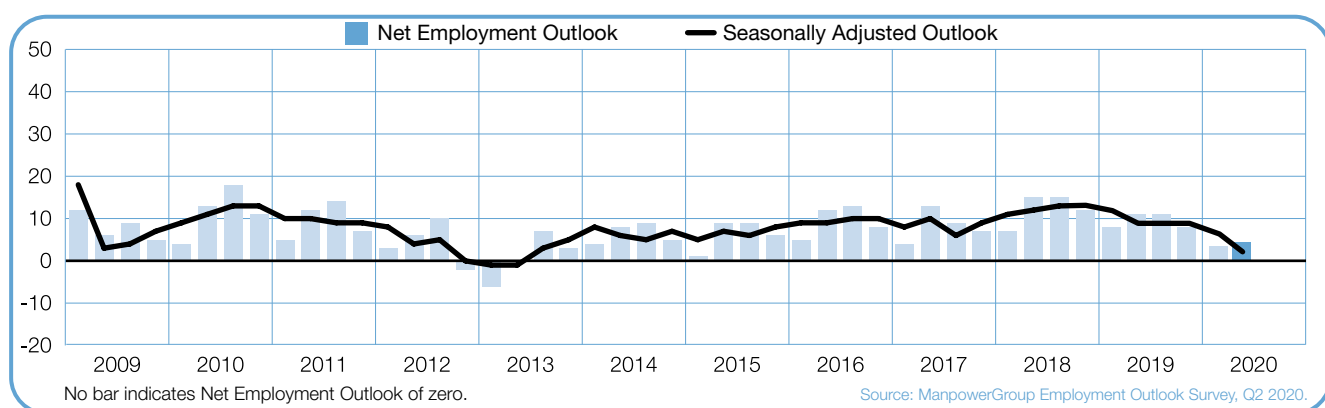
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Poland Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted Outlook
	%	%	%	%	%	%
Q2 2020	6	2	88	4	+4	+2
Q1 2020	6	3	86	5	+3	+6
Q4 2019	13	5	81	1	+8	+9
Q3 2019	14	3	81	2	+11	+9
Q2 2019	14	3	80	3	+11	+9

Source: ManpowerGroup Employment Outlook Survey, Q2 2020.



Polish employers report reserved hiring intentions for the April to June time frame. With 6% of employers expecting to increase payrolls, 2% anticipating a decrease and 88% forecasting no change, the resulting Net Employment Outlook is +4%.

Once the data is adjusted to allow for seasonal variation, the Outlook stands at +2% and is the weakest in seven years. Hiring plans decline by 4 percentage points when compared with the previous quarter and by 7 percentage points in comparison with the same period last year.

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.

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

Organization Size Comparisons

Participating employers are categorized into one of four organization sizes: Micro businesses have less than 10 employees; Small businesses have 10–49 employees; Medium businesses have 50–249 employees; and Large businesses have 250 or more employees.

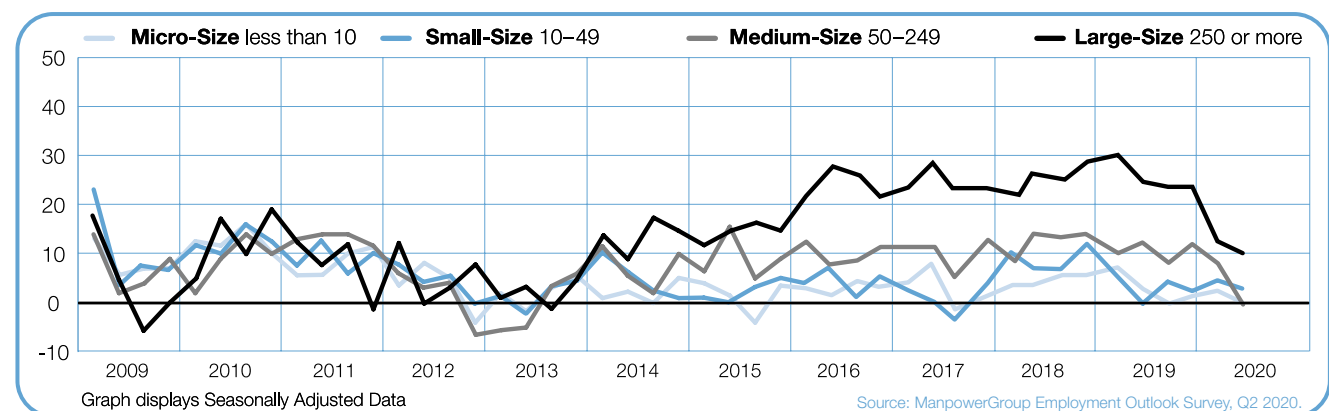
Payroll gains are anticipated in two of the four organization size categories during the April to June period. Large employers report fair hiring prospects with a Net Employment Outlook of +10% and slow-paced job growth is forecast in the Small size category, where the Outlook is +3%. Meanwhile, Micro- and Medium-size firms anticipate flat hiring activity, reporting Outlooks of 0%.

In a quarter-over-quarter comparison, Medium employers report a decrease of 8 percentage points, while Outlooks decline by 3 and 2 percentage points for Large- and Micro-size employers, respectively. However, hiring plans remain relatively stable in the Small employer category.

Large- and Medium-size employers report considerably weaker Outlooks when compared with this time one year ago, declining by 15 and 12 percentage points, respectively. Elsewhere, Micro employers report a slight decrease of 3 percentage points, but the Outlook for Small firms is 3 percentage points stronger.

Organization-Size	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted Outlook
	%	%	%	%	%	%
Micro-Size less than 10	2	2	93	3	0	0
Small-Size 10–49	4	1	93	2	+3	+3
Medium-Size 50–249	6	3	84	7	+3	0
Large-Size 250 or more	12	0	82	6	+12	+10

Source: ManpowerGroup Employment Outlook Survey, Q2 2020.

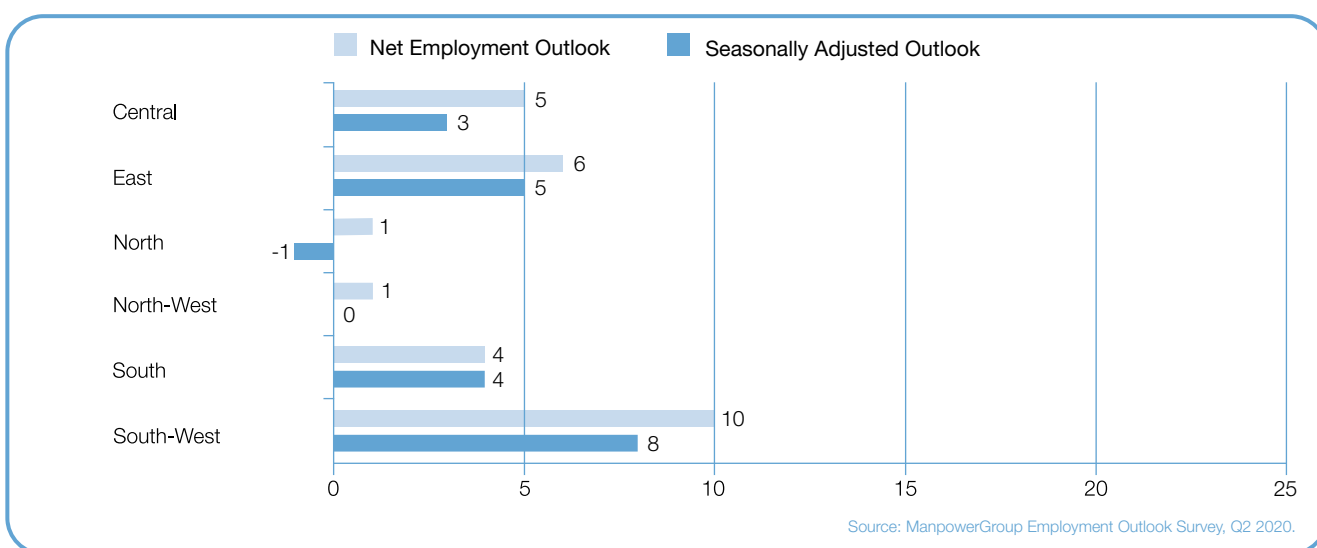


Regional Comparisons

Employers in four of the six regions expect to grow payrolls during the second quarter of 2020. South-West employers anticipate the strongest labor market, reporting a Net Employment Outlook of +8%. Employers in the East report modest hiring intentions with an Outlook of +5%, and Outlooks of +4% and +3% are reported for the South and Central regions, respectively. Meanwhile, hiring prospects are subdued in the North where the Outlook stands at -1%, and in the North-West with an Outlook of 0%.

Hiring prospects weaken in five of the six regions when compared with the previous quarter. The most noteworthy decline of 7 percentage points is reported in the North-West, while Outlooks are 6 percentage points weaker in two regions – the East and the North. However, South-West employers report a slight improvement of 3 percentage points.

In a year-over-year comparison, hiring intentions decline in all six regions. A considerable decrease of 10 percentage points is reported in the North-West, while the Outlook for Central Poland is 7 percentage points weaker. Hiring plans decline by 6 percentage points in both the North and the South, while employers in the East report a decrease of 5 percentage points.

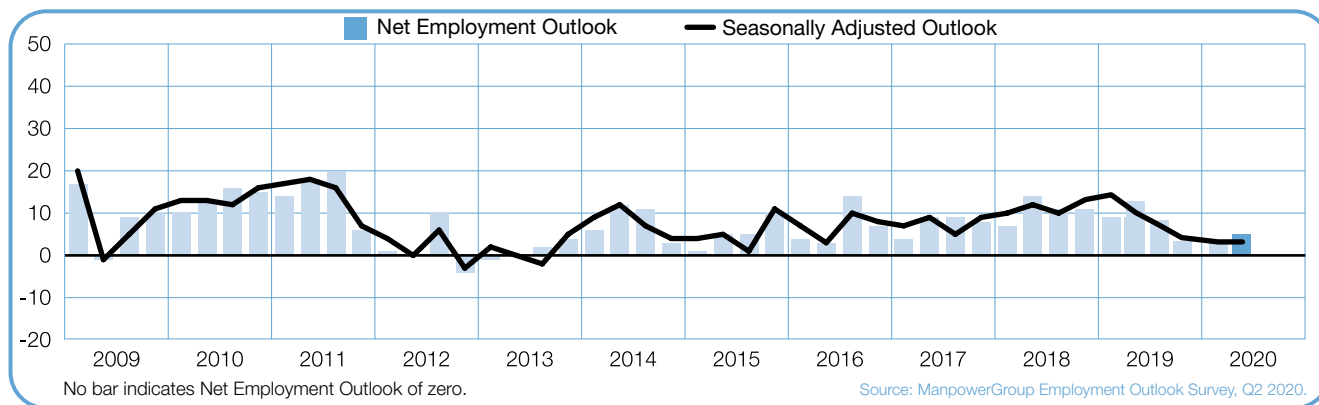


* Regions of Poland according to Eurostat: Central (łódzkie, mazowieckie), East (lubelskie, podkarpackie, świętokrzyskie, podlaskie), North (kujawsko-pomorskie, warmińsko-mazurskie, pomorskie), North-West (wielkopolskie, zachodniopomorskie, lubuskie), South (małopolskie, śląskie), South-West (dolnośląskie,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

+3%

Central

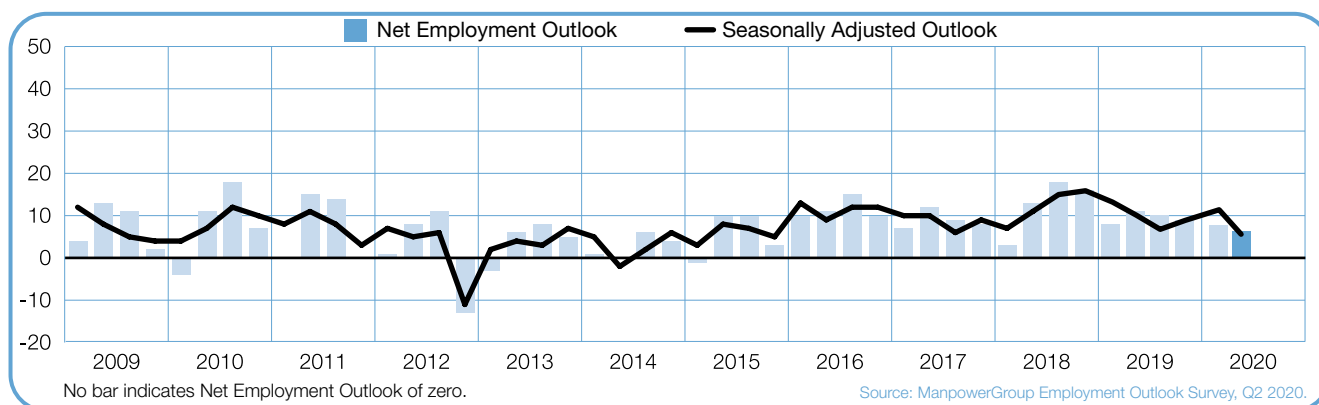
Reporting a Net Employment Outlook of +3%, employers anticipate the weakest labor market in four years during the coming quarter. Hiring prospects decline by 2 percentage points when compared with the previous quarter and are 7 percentage points weaker in comparison with the same period last year.



+5%

East

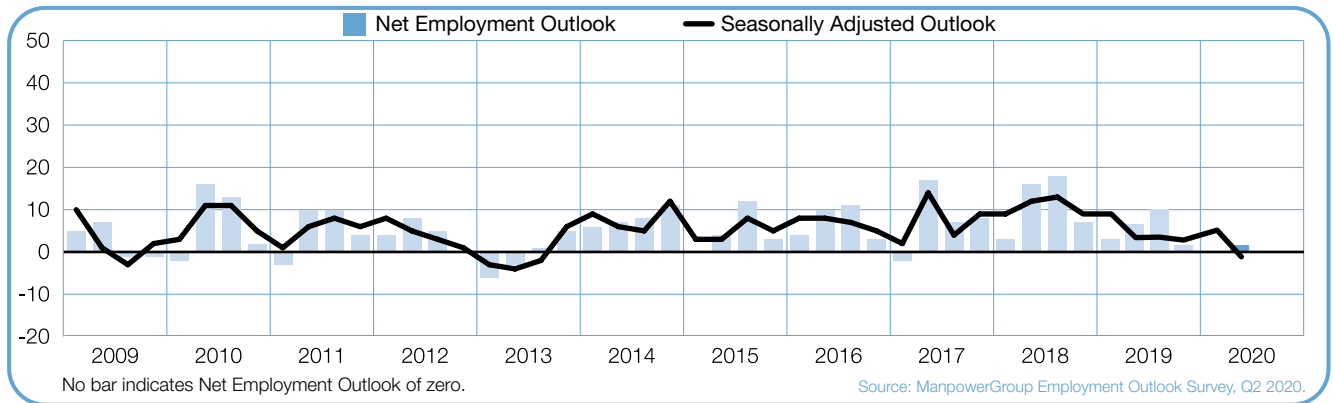
Job seekers can expect modest hiring opportunities in the second quarter of 2020, according to employers who report a Net Employment Outlook of +5%. The Outlook is the weakest in four years, declining by 6 and 5 percentage points quarter-over-quarter and year-over-year, respectively.



-1%

North

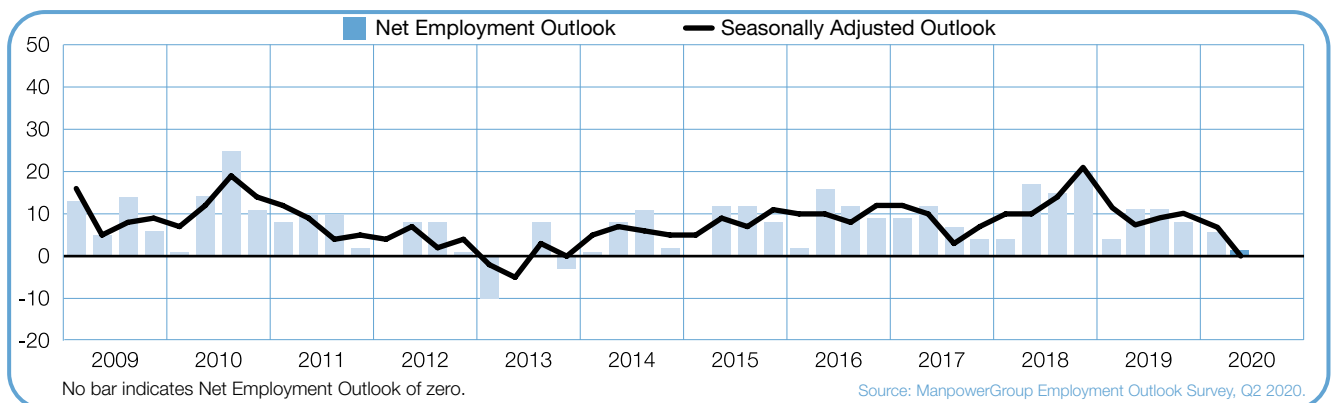
The weakest – and first negative – hiring climate in more than six years is anticipated during the next three months. Employers report a Net Employment Outlook of -1%, decreasing by 6 percentage points in comparison with both the prior quarter and the second quarter of 2019.



0%

North-West

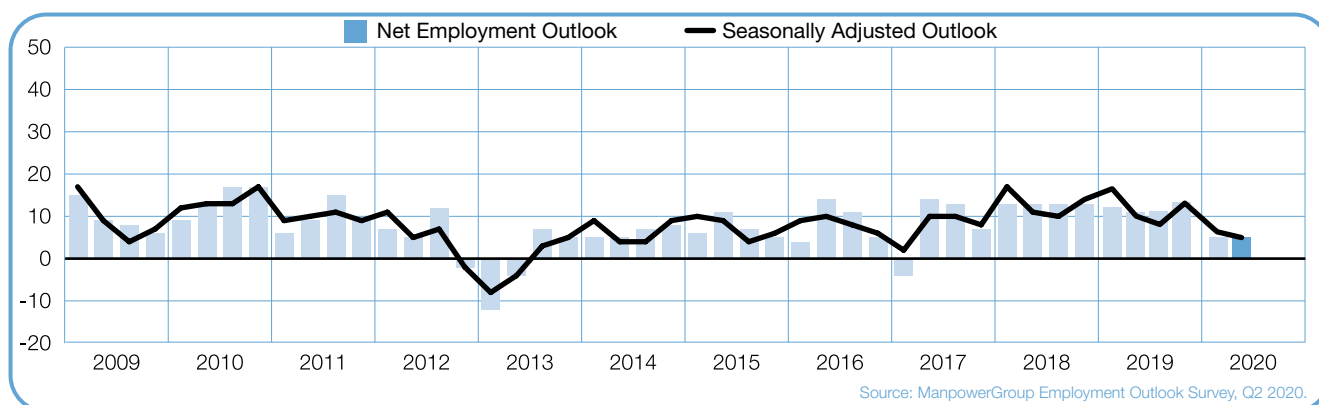
Employers forecast a flat labor market in the April to June period, reporting a Net Employment Outlook of 0%. Hiring prospects are the weakest reported in six years, declining by 7 percentage points when compared with the previous quarter and by a considerable margin of 10 percentage points in comparison with last year at this time.



+4%

South

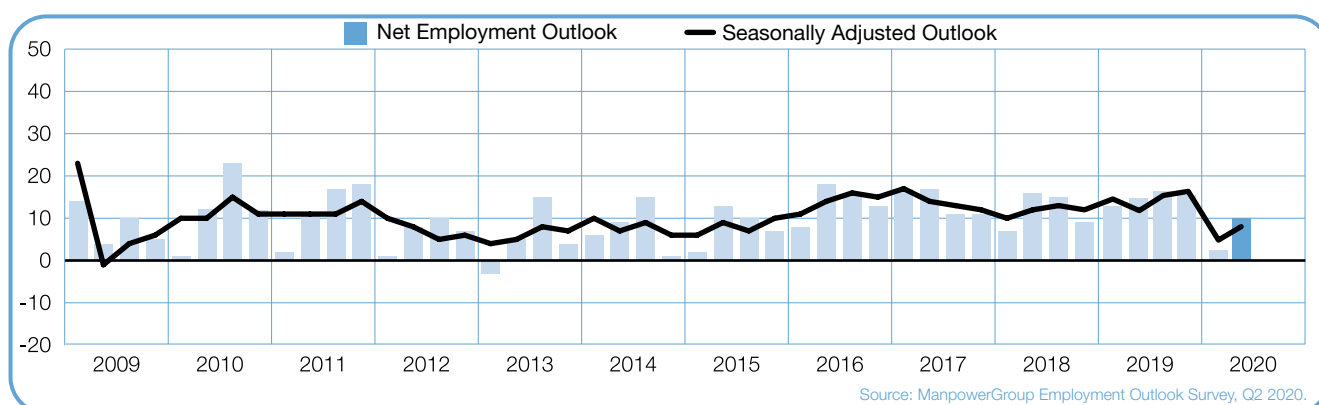
With a Net Employment Outlook for the coming quarter of +4%, employers expect the weakest hiring pace in three years. Hiring plans decrease by 2 percentage points quarter-over-quarter and are 6 percentage points weaker when compared with this time one year ago.



+8%

South-West

Employers report encouraging signs for job seekers in the second quarter of 2020 with a Net Employment Outlook of +8%. Hiring intentions improve by 3 percentage points when compared with the previous quarter, but are 4 percentage points weaker year-over-year.



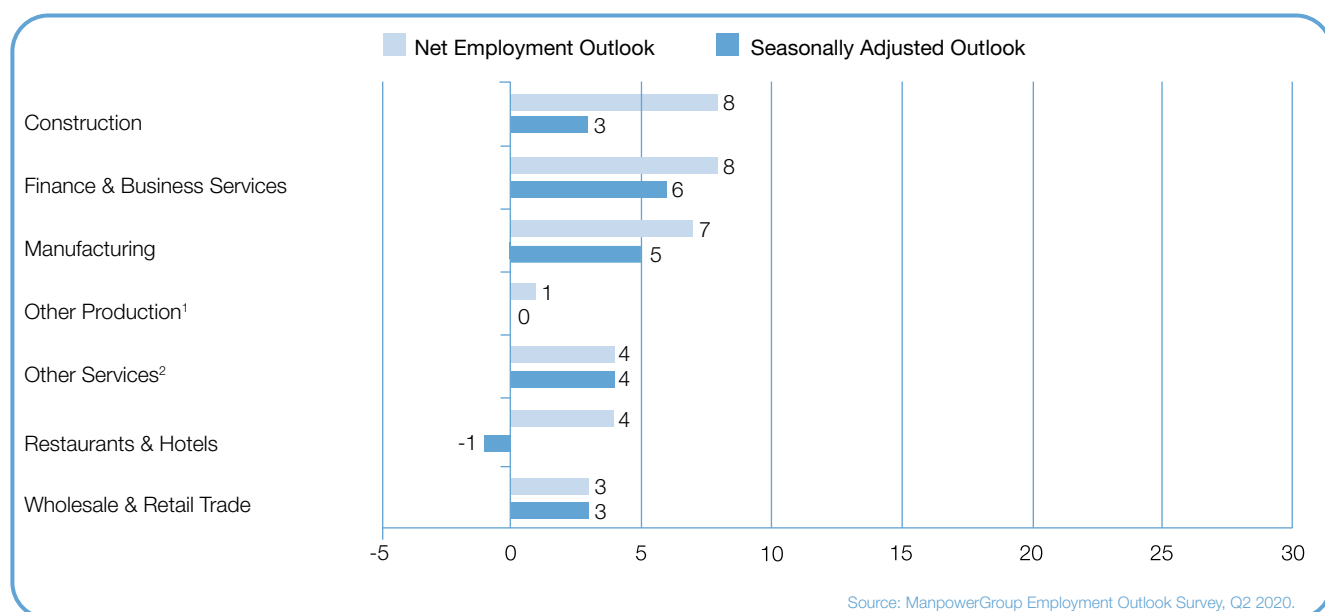
Sector Comparisons

Workforce gains are anticipated in five of the seven industry sectors during the next three months. The strongest hiring prospects are reported in the Finance & Business Services sector with a Net Employment Outlook of +6%, and in the Manufacturing sector where the Outlook stands at +5%. Elsewhere, Other Services² sector employers report modest hiring intentions with an Outlook of +4%, while Outlooks of +3% are reported in both the Construction sector and the Wholesale & Retail Trade sector. However, employers in two sectors anticipate subdued hiring activity, with Outlooks standing at -1% and 0% in the Restaurants & Hotels sector and the Other Production¹ sector, respectively.

Hiring plans weaken in six of the seven industry sectors when compared with the previous quarter. A considerable decline of 12 percentage points is reported by Construction sector employers, while Outlooks are 5 percentage points weaker in both the Manufacturing sector and the Other Production sector. Wholesale & Retail Trade sector employers

report a decrease of 3 percentage points and the Restaurants & Hotels sector Outlook declines by 2 percentage points. Meanwhile, hiring intentions are unchanged in the Finance & Business Services sector.

When compared with this time one year ago, Outlooks also decline in six of the seven industry sectors, most notably by 16 percentage points in the Manufacturing sector. Considerable decreases of 9 percentage points are reported in two sectors – the Other Services sector and the Wholesale & Retail Trade sector – and Construction sector employers report a decline of 8 percentage points. However, Finance & Business Services sector employers report a year-over-year improvement of 8 percentage points.



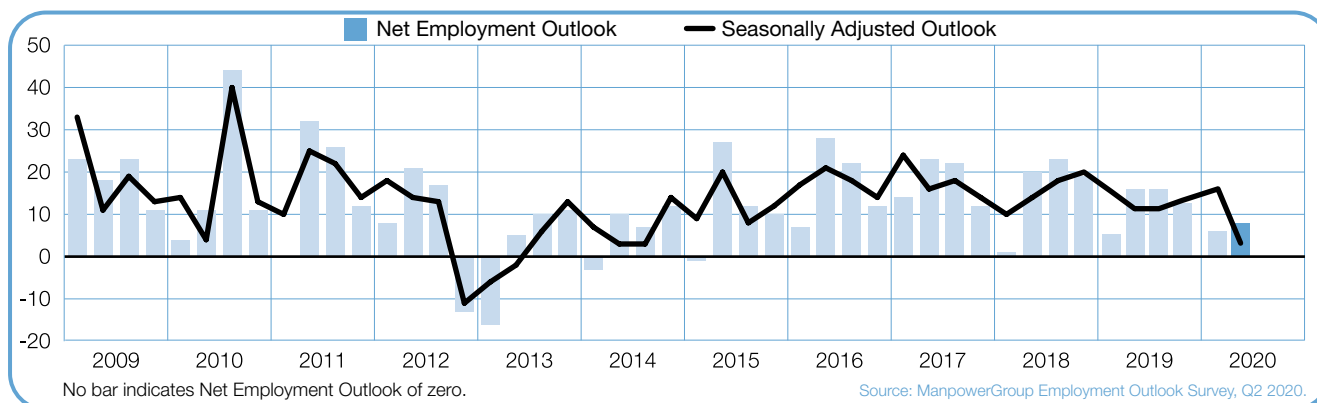
¹ Other Production – from the current edition of the report the name will present cumulative data on sectors: Mining & Quarrying, Electricity, Gas & Water Supply and Agriculture, Hunting, Forestry & Fishing. Data on these sectors have also been aggregated for archival data.

² Other Services – from the current edition of the report the name will present cumulative data on sectors: Social & Public and Transport, Storage & Communications. Data on these sectors have also been aggregated for archival data.

+3%

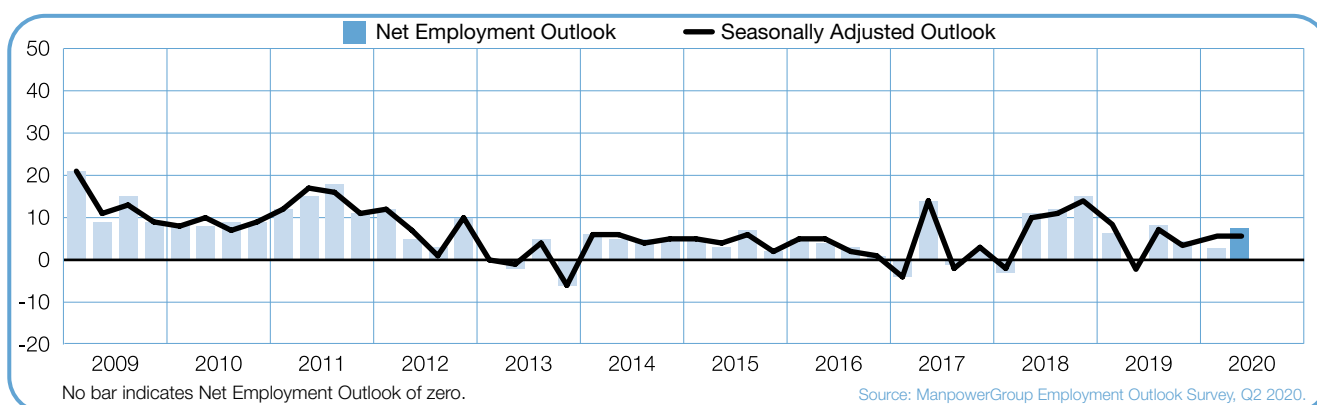
Construction

Employers anticipate the weakest hiring pace in more than five years, reporting a Net Employment Outlook of +3% for the second quarter of 2020. Hiring plans decline by a considerable margin of 12 percentage points quarter-over-quarter and are 8 percentage points weaker when compared with this time one year ago.

**+6%**

Finance & Business Services

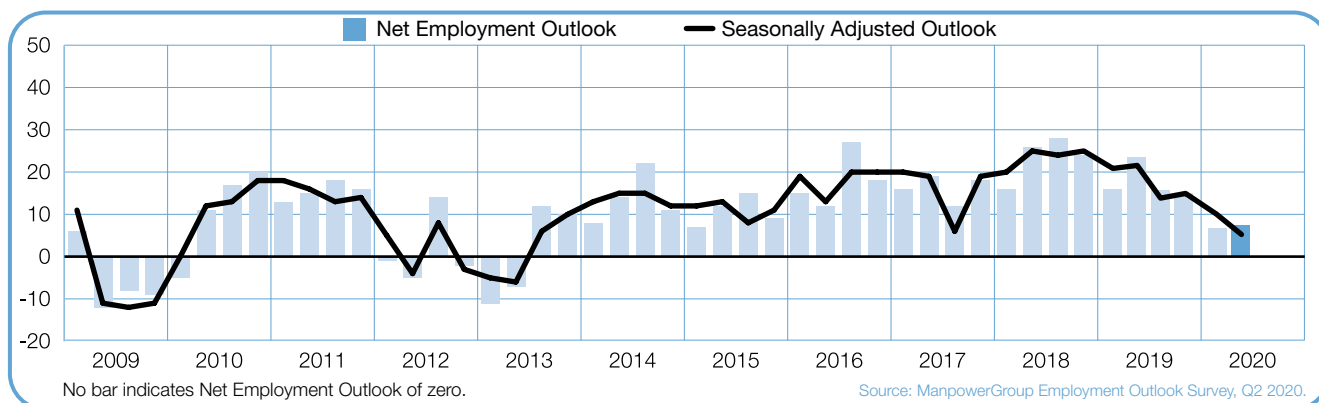
Job seekers can expect the fair hiring climate to continue in the upcoming quarter, according to employers who report a Net Employment Outlook of +6% for the second consecutive quarter. When compared with the same period last year, the Outlook improves by 8 percentage points.



+5%

Manufacturing

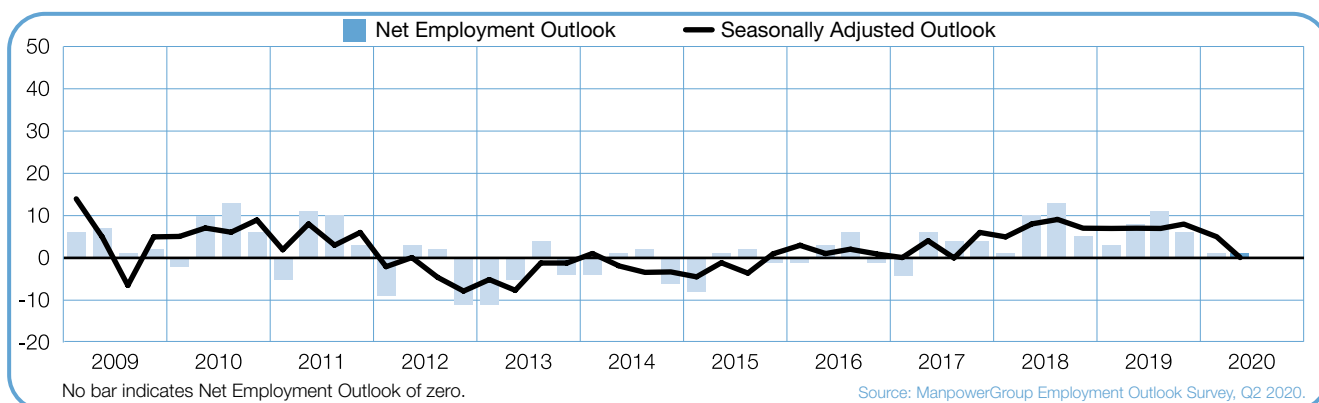
With a Net Employment Outlook of +5%, employers forecast modest payroll gains in the coming quarter. However, the Outlook is the weakest reported in seven years, declining by 5 percentage points when compared with the previous quarter and by 16 percentage points in comparison with last year at this time.



0%

Other Production

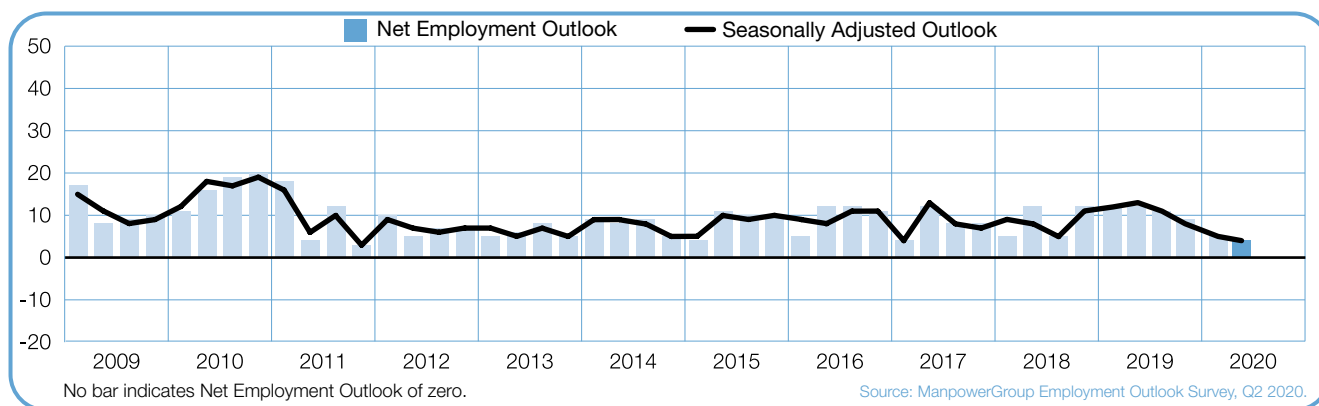
Job seekers can expect a flat labor market in the April to June time frame, according to employers who report a Net Employment Outlook of 0%. Hiring prospects are the weakest in more than two years, declining by 5 percentage points quarter-over-quarter and by 7 percentage points when compared with this time one year ago.



+4%

Other Services

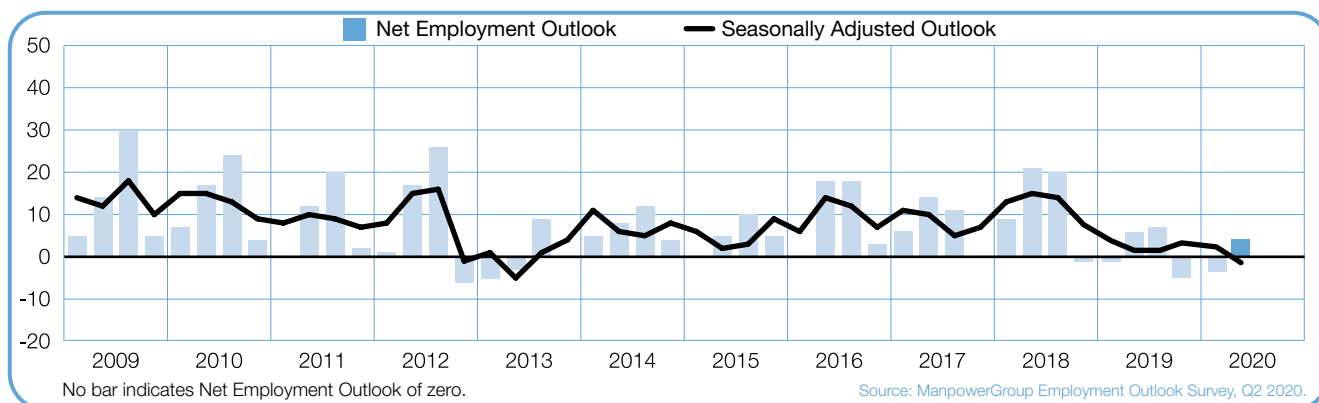
The weakest labor market in three years is forecast for the second quarter of 2020. Employers report a Net Employment Outlook of +4%, remaining relatively stable when compared with the previous quarter, but declining by 9 percentage points in comparison with the same period last year.



-1%

Restaurants & Hotels

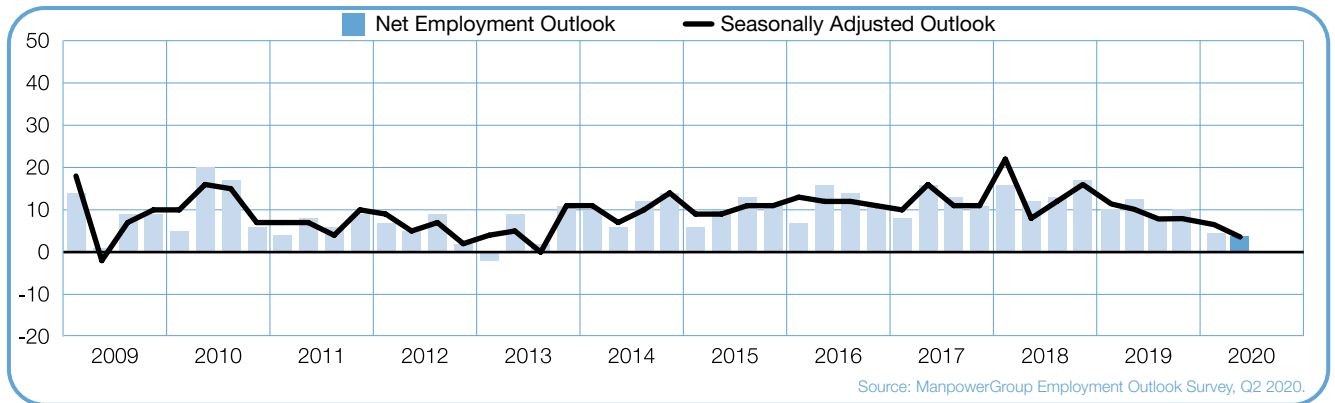
Reporting a Net Employment Outlook of -1%, employers anticipate the weakest hiring pace in seven years during the next three months. Hiring intentions are 2 percentage points weaker both quarter-over-quarter and year-over-year.



+3%

Wholesale & Retail Trade

Employers expect limited payroll gains in the forthcoming quarter, reporting a Net Employment Outlook of +3%. However, the Outlook is the weakest in more than six years, declining by 3 and 9 percentage points in comparison with the prior quarter and the second quarter of 2019, respectively.

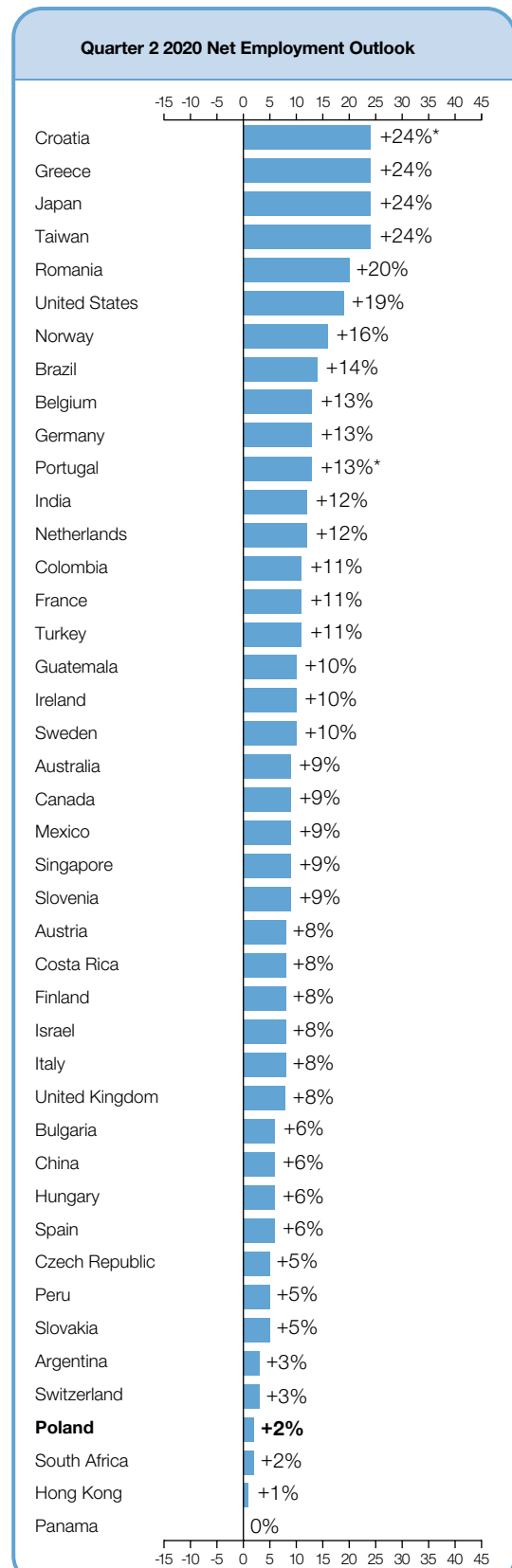


Global Employment Outlook

	Quarter 2 2020	Qtr on Qtr Change Q1 2020 to Q2 2020	Yr on Yr Change Q2 2019 to Q2 2020
	%		
Americas			
Argentina	4 (3) ¹	3 (2) ¹	3 (3) ¹
Brazil	17 (14) ¹	8 (4) ¹	7 (7) ¹
Canada	11 (9) ¹	5 (-1) ¹	-2 (-2) ¹
Colombia	11 (11) ¹	1 (0) ¹	4 (5) ¹
Costa Rica	9 (8) ¹	6 (6) ¹	3 (3) ¹
Guatemala	11 (10) ¹	4 (3) ¹	1 (1) ¹
Mexico	10 (9) ¹	2 (0) ¹	-3 (-3) ¹
Panama	-1 (0) ¹	-1 (1) ¹	-3 (-3) ¹
Peru	7 (5) ¹	3 (1) ¹	-4 (-3) ¹
United States	20 (19) ¹	3 (0) ¹	-1 (0) ¹

Asia-Pacific			
Australia	9 (9) ¹	-3 (-2) ¹	-1 (-1) ¹
China	6 (6) ¹	-1 (0) ¹	0 (0) ¹
Hong Kong	0 (1) ¹	-11 (-10) ¹	-19 (-18) ¹
India	12 (12) ¹	2 (2) ¹	-1 (-1) ¹
Japan	29 (24) ¹	5 (-1) ¹	-2 (-2) ¹
Singapore	9 (9) ¹	1 (0) ¹	-2 (-2) ¹
Taiwan	24 (24) ¹	3 (1) ¹	4 (4) ¹

EMEA**			
Austria	10 (8) ¹	6 (-1) ¹	-4 (-4) ¹
Belgium	13 (13) ¹	1 (1) ¹	1 (1) ¹
Bulgaria	10 (6) ¹	6 (-1) ¹	0 (1) ¹
Croatia	24	19	-10
Czech Republic	5 (5) ¹	2 (1) ¹	-4 (-4) ¹
Finland	13 (8) ¹	9 (-3) ¹	-2 (-1) ¹
France	12 (11) ¹	1 (-2) ¹	1 (0) ¹
Germany	15 (13) ¹	12 (4) ¹	-1 (-1) ¹
Greece	31 (24) ¹	12 (-1) ¹	4 (4) ¹
Hungary	8 (6) ¹	4 (0) ¹	5 (5) ¹
Ireland	13 (10) ¹	9 (2) ¹	-4 (-4) ¹
Israel	9 (8) ¹	3 (0) ¹	0 (0) ¹
Italy	12 (8) ¹	9 (2) ¹	0 (0) ¹
Netherlands	14 (12) ¹	7 (2) ¹	0 (0) ¹
Norway	17 (16) ¹	7 (4) ¹	8 (8) ¹
Poland	4 (2)¹	1 (-4)¹	-7 (-7)¹
Portugal	13	3	0
Romania	25 (20) ¹	14 (5) ¹	10 (10) ¹
Slovakia	7 (5) ¹	7 (3) ¹	-4 (-5) ¹
Slovenia	9 (9) ¹	3 (1) ¹	-4 (-2) ¹
South Africa	3 (2) ¹	1 (0) ¹	-3 (-3) ¹
Spain	8 (6) ¹	6 (1) ¹	1 (1) ¹
Sweden	13 (10) ¹	8 (1) ¹	-4 (-5) ¹
Switzerland	4 (3) ¹	0 (-2) ¹	-4 (-4) ¹
Turkey	15 (11) ¹	10 (0) ¹	10 (10) ¹
UK	9 (8) ¹	4 (1) ¹	-1 (-1) ¹



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.

* Indicates unadjusted data.

**EMEA – Europe, Middle East and Africa.

ManpowerGroup interviewed over 58,000 employers in 43 countries and territories to forecast labor market activity* in the second quarter of 2020. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of June 2020 as compared to the current quarter?”.

In the ManpowerGroup research for the second quarter of 2020, employers in 42 of 43 countries and territories surveyed expect to increase payrolls in the April to June period.

When compared with the first quarter of 2020, hiring intentions strengthen in 23 of the 43 countries and territories, while employers in 11 report weaker hiring plans, with no change reported in nine. In a comparison with this time one year ago, employers in 15 countries and territories report stronger hiring prospects, while hiring plans decline in 21, and are unchanged in seven. The strongest hiring activity is anticipated in Croatia, Greece, Japan and Taiwan, while the weakest labor markets are expected in Panama, Hong Kong, Poland and South Africa.

Workforce gains are expected in all 26 Europe, Middle East & Africa (EMEA) region countries surveyed during the second quarter of 2020. When compared with the prior quarter, hiring prospects strengthen in 15 countries, but weaken in seven. In a comparison with the second quarter of 2019, outlooks improve in nine countries, but decline in 12. Employers in Croatia and Greece expect the strongest labor markets during the forthcoming quarter, while the weakest hiring sentiment is reported in Poland and South Africa.

Employers in all seven Asia Pacific countries and territories expect to grow payrolls in the April to June period. In a comparison with the previous quarter, hiring prospects strengthen in two countries and territories, but weaken in three. When compared with this time one year ago, hiring intentions decline in five countries and territories, while improving in one. Employers expect the strongest hiring pace in Japan and Taiwan during the next three months, while the most cautious hiring plans reported in Hong Kong.

Payrolls are expected to grow in nine of the 10 Americas countries surveyed during the second quarter of 2020, while Panamanian employers continue to anticipate a subdued hiring climate. When compared with the prior quarter, hiring plans strengthen in six Americas countries, but decline in one. In a year-over-year comparison, employers in five countries report stronger hiring sentiment, but hiring prospects weaken in four. Americas employers expect the strongest hiring activity in the U.S. and Brazil during coming quarter, while the weakest labor market is anticipated in Panama.

Full survey results for each of the 43 countries and territories included in this quarter's survey, plus regional and global comparisons, can be found at www.manpowergroup.com/meos. The next ManpowerGroup Employment Outlook Survey will be released on 9th June 2020 and will detail expected labor market activity for the third quarter of 2020.

* Commentary is based on seasonally adjusted data where available. Data is not seasonally adjusted for Croatia or Portugal.

International Comparisons – Americas

Almost 23,000 employers in North, Central and South America were interviewed for the ManpowerGroup survey on hiring plans for the second quarter of 2020. In nine of the 10 Americas countries, employers anticipate job gains during the coming quarter.

For the tenth consecutive quarter, employers in the United States report the strongest hiring prospects in the region. U.S. hiring sentiment is unchanged both quarter-over-quarter and year-over-year, and payrolls are expected to increase in all 12 industry sectors during the April to June period. The strongest sector labor markets are anticipated in the Leisure & Hospitality sector, the Transportation & Utilities sector and the Wholesale & Retail Trade sector.

While Canadian employers expect some hiring opportunities in the next three months, they report their weakest Outlook in two years. Job gains are expected in all 10 industry sectors, but hiring prospects dip in six sectors when compared with the first quarter of 2020 and this time last year. In Western Canada, employers anticipate the weakest hiring pace in four years.

In Mexico, employers expect the moderate hiring pace to continue in the second quarter of 2020, although hiring sentiment remains weaker in comparison with last year at this time. With job gains forecast in all seven industry sectors, the strongest hiring pace is anticipated by Commerce sector employers. However, Mining & Extraction sector employers report the weakest hiring plans in three years.

Employers in two of the three Central American countries surveyed report an improved hiring climate in comparison with the first quarter of 2020. In Costa Rica, employers report a recovery from the weak forecast reported three months ago, with quarter-over-quarter and year-over-year improvements driven by stronger hiring plans in the Services and Manufacture sectors. The Guatemalan outlook also strengthens when compared with the first quarter of 2020, buoyed by improved hiring prospects in the Manufacturing sector.

Meanwhile, employers continue to report subdued hiring plans in Panama. Employers expect to trim payrolls in four of the country's six industry sectors during the next three months – including the Construction and Manufacturing sectors – although Services sector employers report an uptick in hiring activity.

In South America, Brazilian employers report the strongest forecast since the end of 2013, fueled by an upbeat hiring pace in the Manufacturing and Services sectors, where hiring plans are the strongest in five years. Noteworthy improvements are reported in the São Paulo City and Great São Paulo labor markets both quarter-over-quarter and year-over-year.

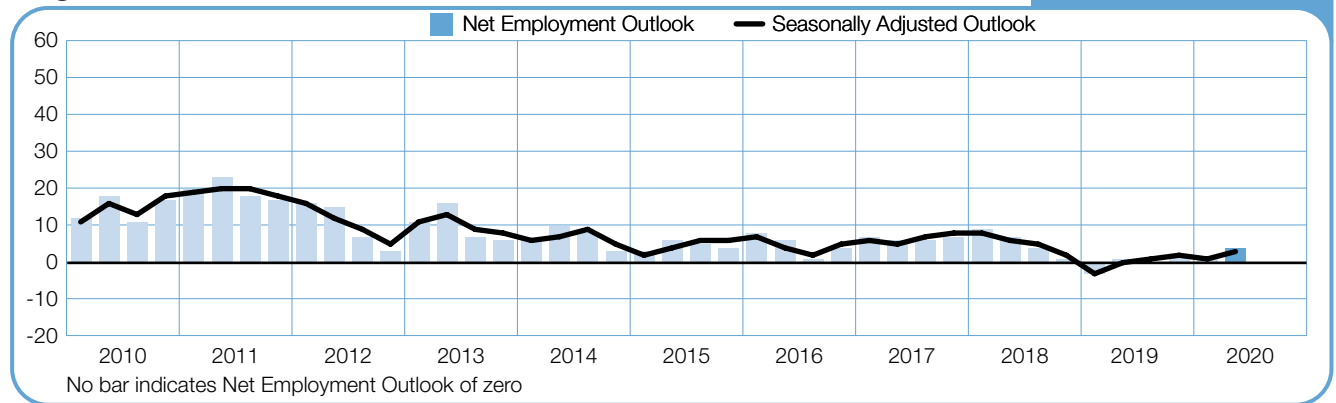
Argentine employers report a slight improvement in hiring plans, anticipating slow-paced workforce gains during the coming quarter. Outlooks improve in eight of nine industry sectors when compared with the prior quarter, including the Construction sector where employers report their strongest forecast in two years.

The favorable hiring climate is expected to continue in Colombia during the April to June period. Payroll gains are anticipated in all nine industry sectors and all five regions in the upcoming quarter.

In Peru, employers continue to expect modest job gains. The labor market is likely buoyed by the strongest Construction sector outlook in three years and a moderate strengthening of hiring plans in the Mining sector after the dip last quarter.

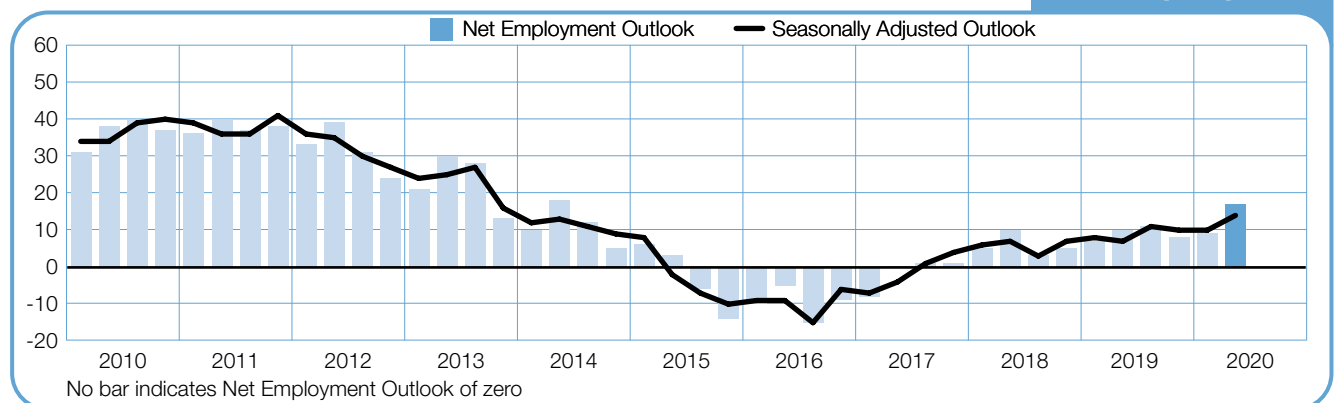
Argentina

+4 (+3)%



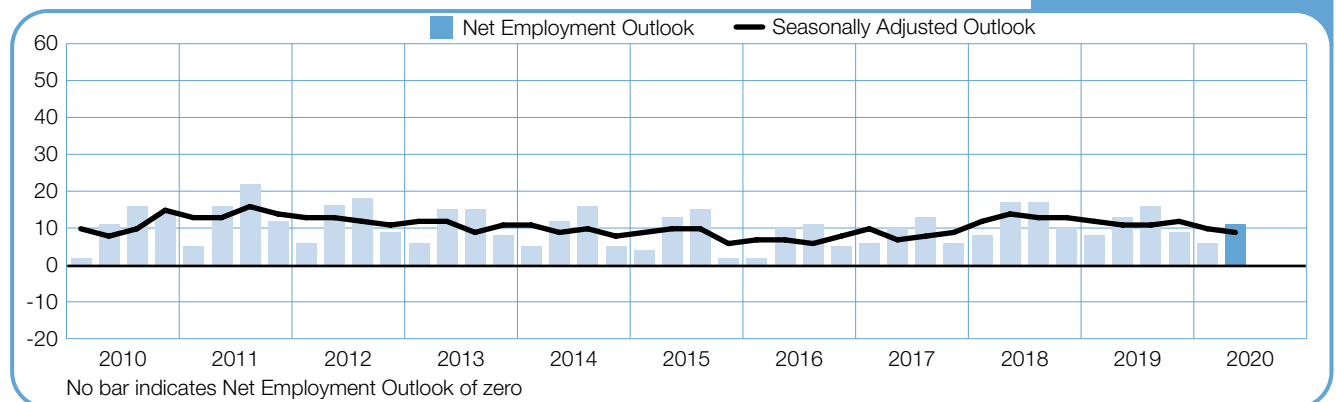
Brazil

+17 (+14)%



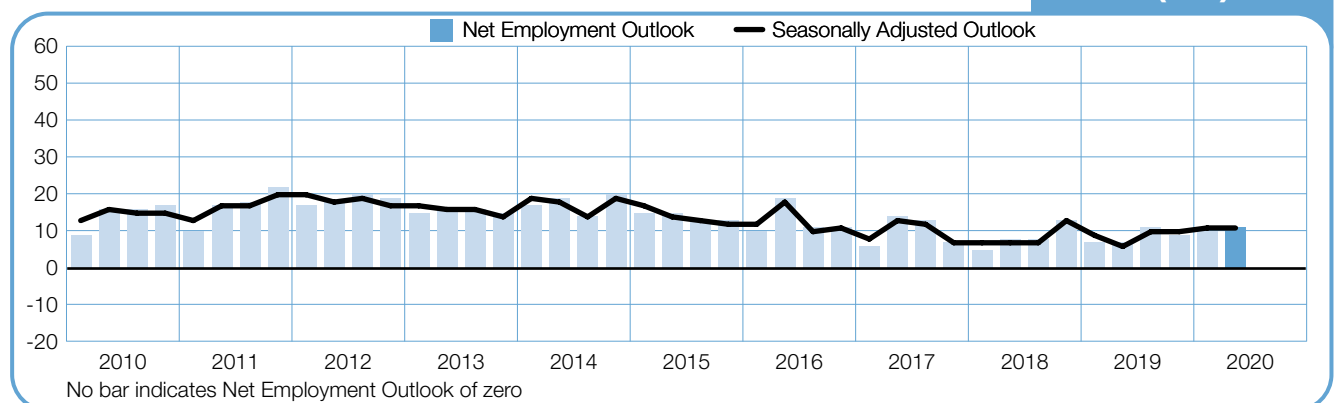
Canada

+11 (+9)%



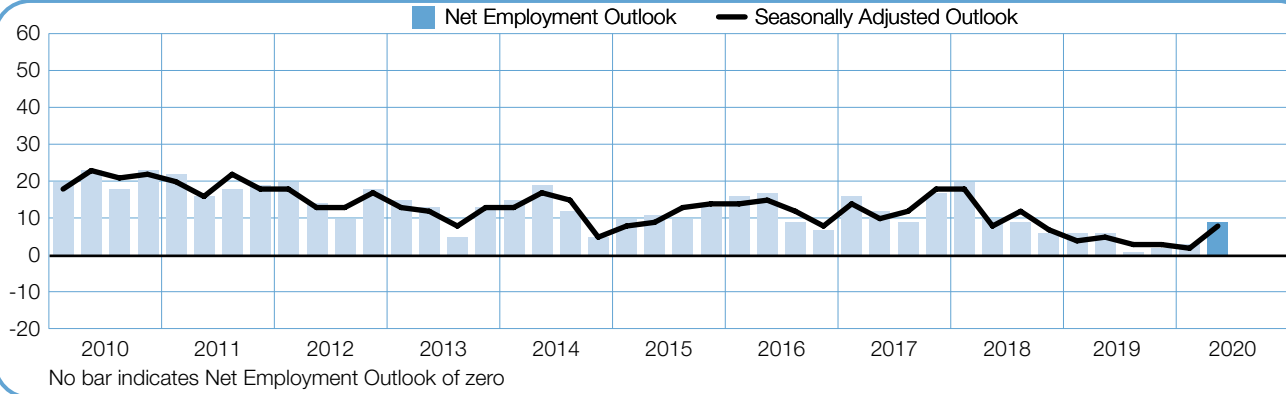
Colombia

+11 (+11)%



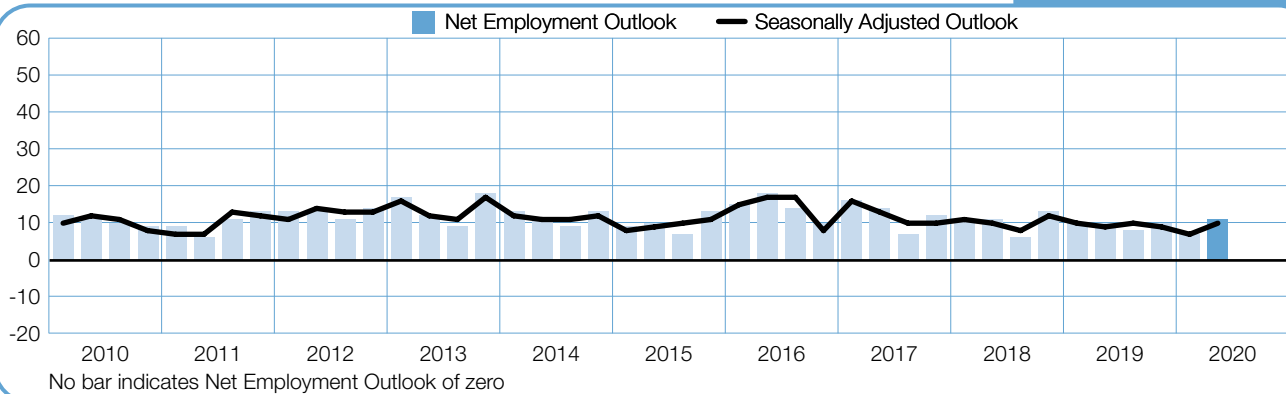
Costa Rica

+9 (+8)%



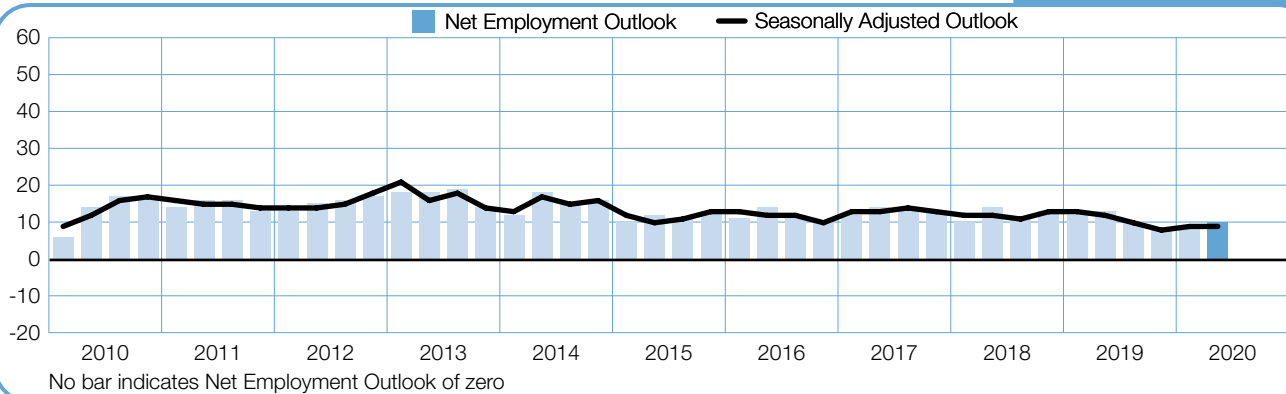
Guatemala

+11 (+10)%



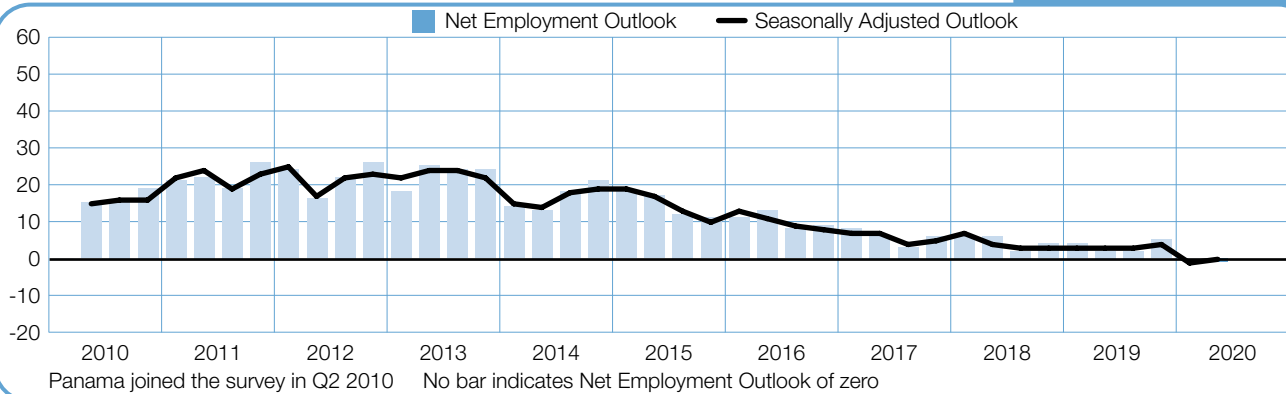
Mexico

+10 (+9)%



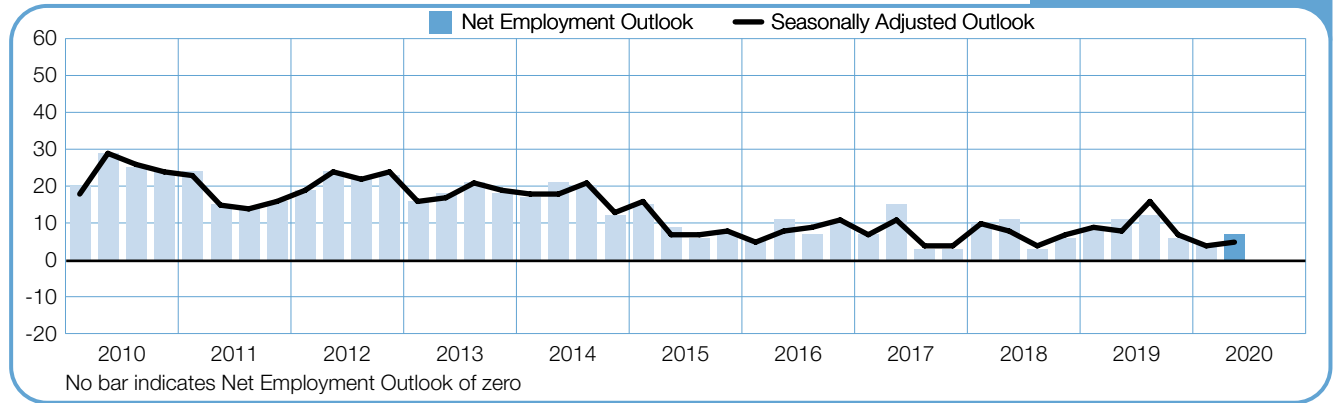
Panama

-1 (0)%



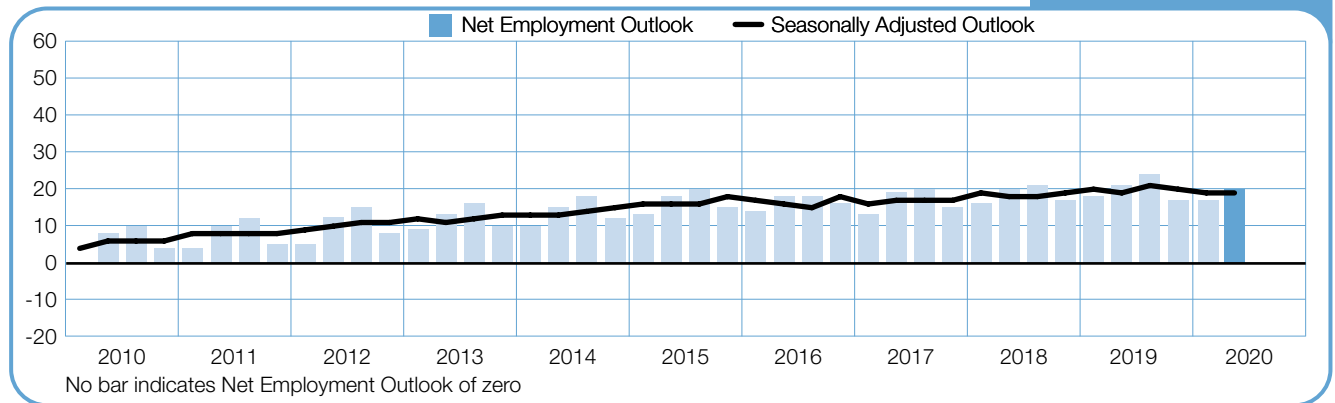
Peru

+7 (+5)%



United States of America

+20 (+19)%



International Comparisons

– Asia–Pacific

More than 14,000 employers in seven Asia–Pacific countries and territories were interviewed for ManpowerGroup’s survey of employer hiring intentions in 2Q 2020. In all seven countries and territories, employers expect to add to payrolls during the next three months.

In Japan, employers continue to anticipate healthy hiring activity, reporting a relatively stable forecast when compared with the first quarter of 2020. Mining & Construction sector employers report the strongest sector outlook for the fifth consecutive quarter, and the brisk hiring pace anticipated by Transportation & Utilities sector employers reflects a quarter-over-quarter uptick in hiring plans. However, hiring sentiment weakens slightly when compared with this time one year ago, decreasing in all seven industry sectors.

Taiwanese employers anticipate an active labor market in the second quarter of 2020, matching the outlook reported in Japan. Employers in the Construction sector in part fuel the strong hiring prospects, reporting the strongest forecast in four years, and solid job gains are also anticipated in the Services sector.

In the region’s largest labor market, Chinese employers expect the mild hiring pace to continue in the coming quarter, reporting an unchanged outlook both quarter-over-quarter and year-over-year. Hiring plans improve in four of China’s six industry sectors when compared with the first quarter of 2020, with the strongest hiring prospects reported in the Services sector.

Hong Kong employers report uncertain hiring prospects for the next three months, with their weakest forecast in 10 years. Hiring sentiment weakens in all six of Hong Kong’s industry sectors when compared with both the prior quarter and last year at this time, including the Manufacturing sector where employers expect to trim payrolls during 2Q 2020.

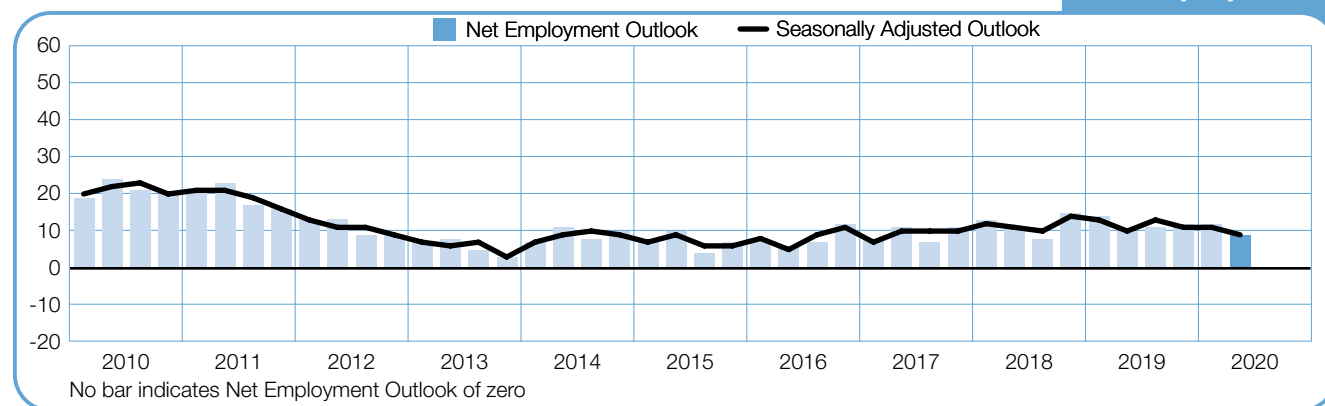
Australian employers expect a moderate hiring pace in the coming quarter, driven in part by positive hiring activity in the Services sectors. However, the country’s outlook dips to its weakest point in three years, reflecting limited hiring plans in the Transportation & Utilities sector, which sink to a level last reported in 2009.

In Singapore, employers report unchanged hiring intentions when compared with the prior quarter, expecting the fair hiring pace to continue in 2Q 2020. Services sector employers report improved hiring plans quarter-over-quarter, forecasting the strongest of the seven sector labor markets.

India’s outlook for the coming quarter reflects hopeful hiring intentions in all four regions, and employers in all seven Indian industry sectors anticipate stronger hiring activity than the previous quarter. The favorable forecast is buoyed by positive hiring sentiment in the Mining & Construction, Services and Wholesale & Retail Trade sectors.

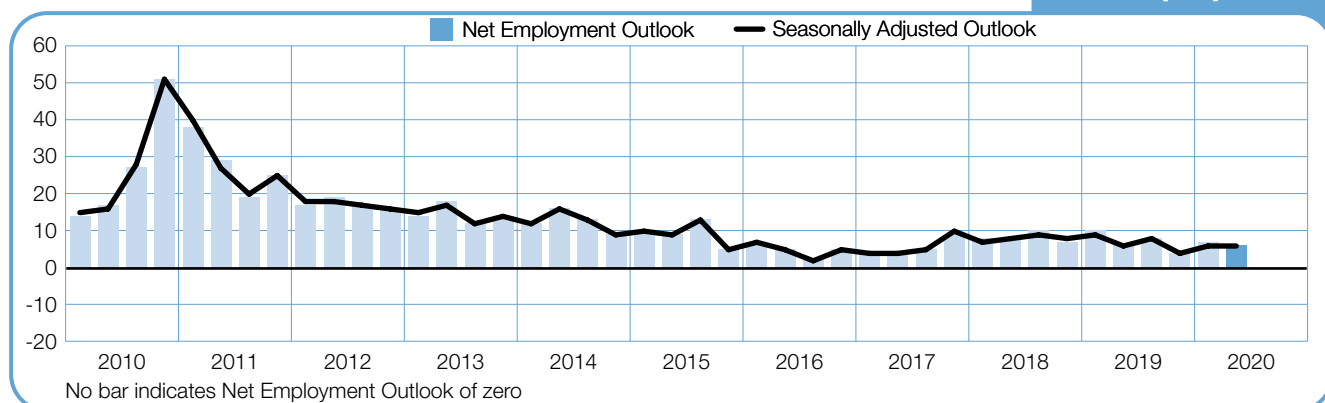
Australia

+9 (+9)%



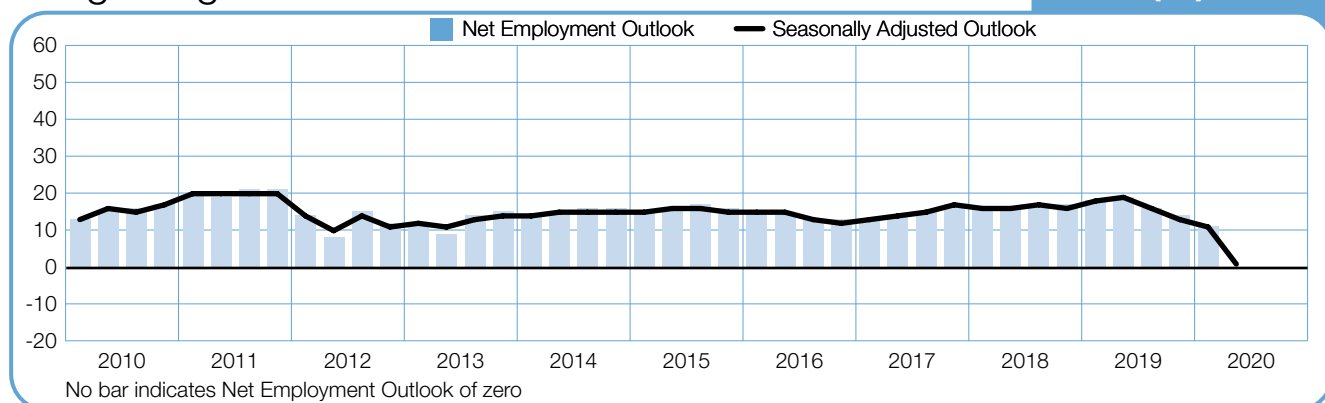
China

+6 (+6)%



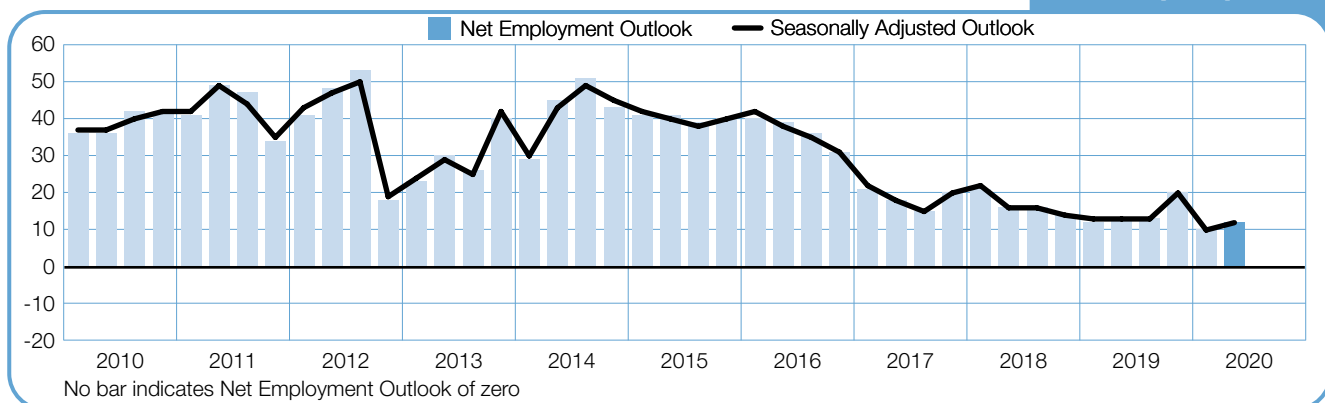
Hong Kong

0 (+1)%



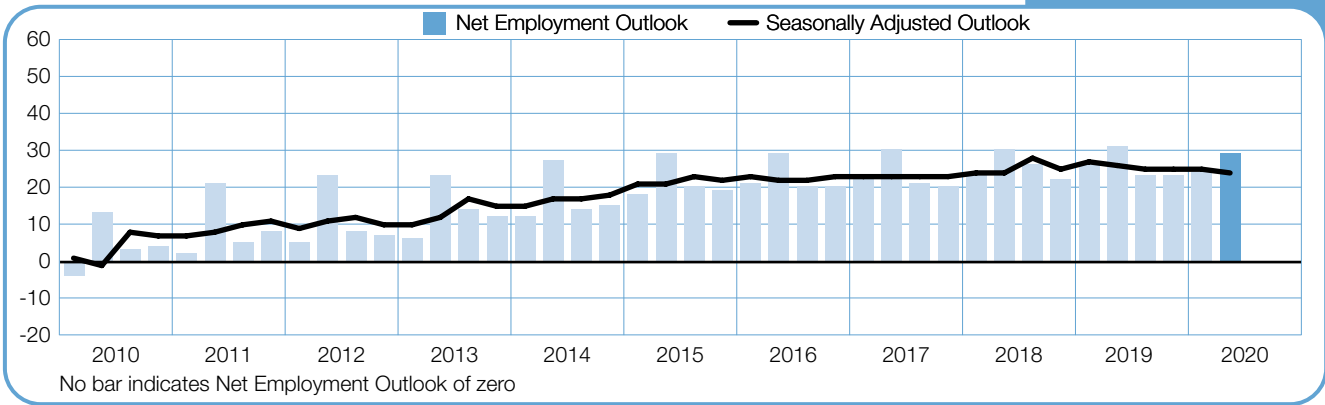
India

+12 (+12)%



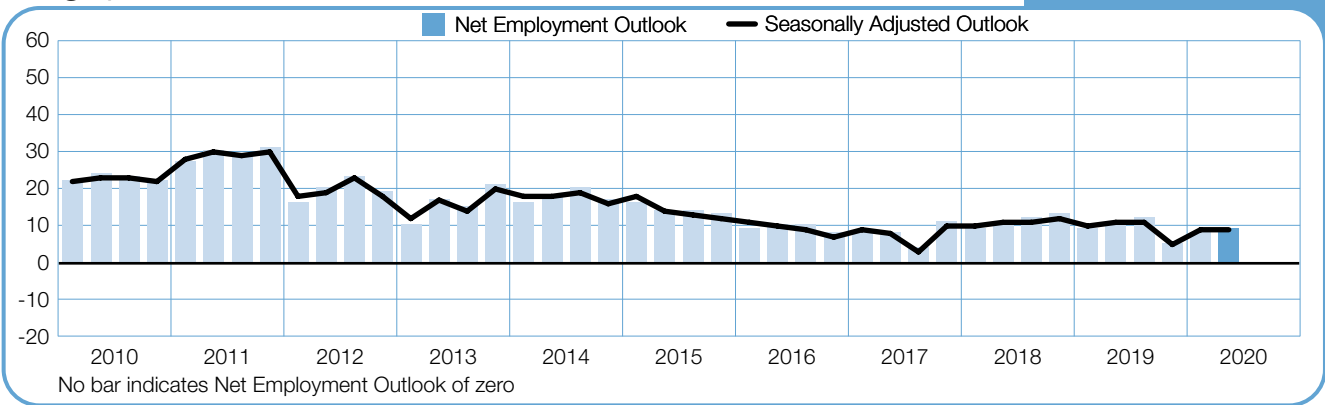
Japan

+29 (+24)%



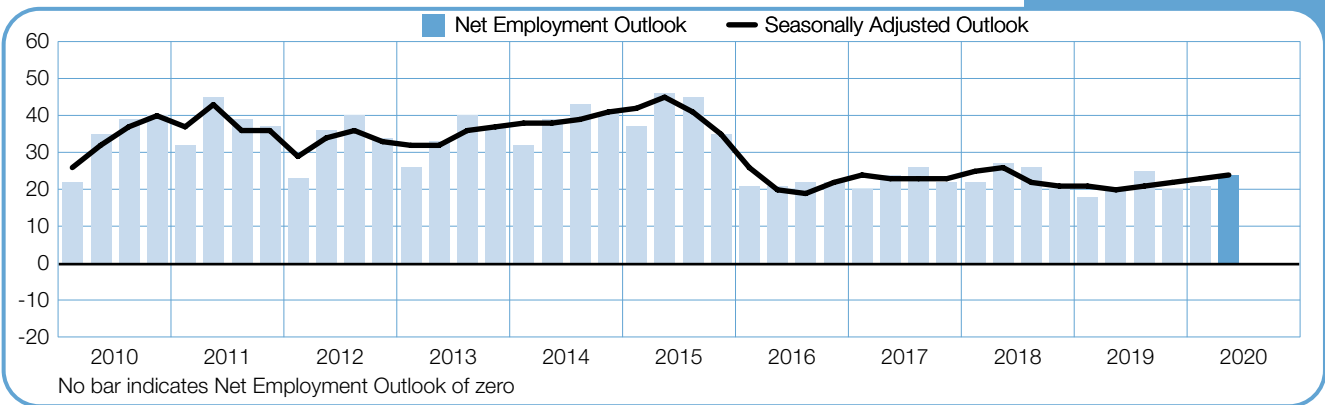
Singapore

+9 (+9)%



Taiwan

+24 (+24)%



International Comparisons – EMEA (Europe, Middle East, Africa)

For the second quarter of 2020, more than 21,000 employers in Europe, Middle East and Africa (EMEA) region were surveyed by ManpowerGroup. In all 26 EMEA countries, employers expect to increase payrolls between April and June 2020.

Employers in all four of Europe's largest economies report positive hiring expectations for the upcoming quarter. The strongest of the four outlooks is reported in Germany where employers anticipate a steady hiring pace, with hiring plans strengthening in five of the seven German industry sectors in comparison with the prior quarter. The strongest labor markets are forecast by employers in the Finance & Business Services and Construction sectors.

In France, employers continue to anticipate respectable job gains, driven in part by upbeat hiring plans for the Construction sector. Employers in the UK report some encouraging signs for job seekers in the coming quarter, including a cautiously optimistic forecast in the Finance & Business Services sector.

Italian employers match their strongest hiring intentions since the survey began 17 years ago, anticipating a fair hiring pace in the next three months. Job gains are anticipated in all seven of Italy's industry sectors, with the strongest hiring plans reported in the Wholesale & Retail Trade sector.

Elsewhere in Western Europe, Dutch employers expect the favorable hiring climate to continue during the second quarter of 2020, reporting respectable hiring plans in the Finance & Business Services, Manufacturing and Wholesale & Retail Trade sectors. Hiring sentiment also remains relatively stable in Belgium, in part buoyed by a hopeful Manufacturing sector where employers report their strongest outlook in 11 years. Positive hiring plans are also reported for the Construction sector.

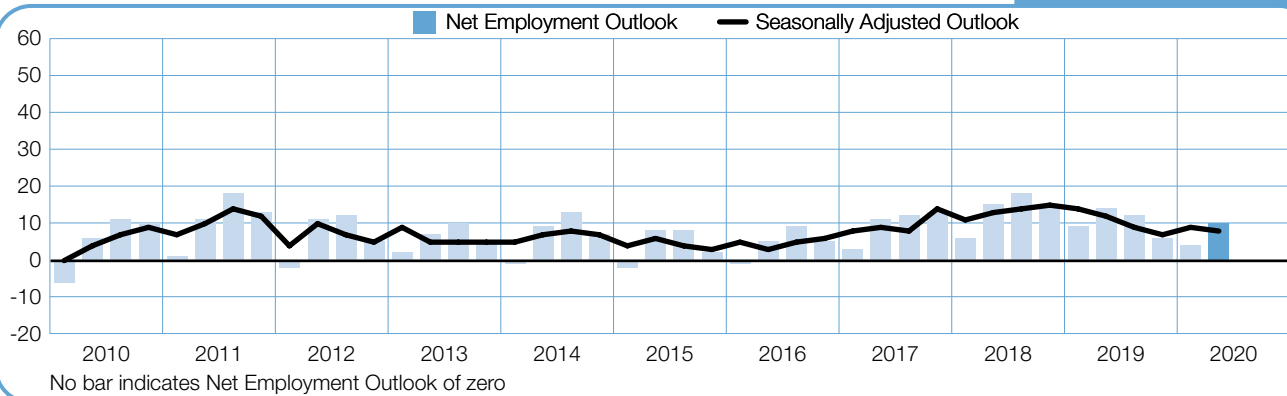
In the Nordic region, Norwegian employers report the strongest hiring prospects in eight years, anticipating payroll gains in all seven industry sectors and all five regions. Employers in the Construction sector anticipate a booming labor market, and the Outlook for the Finance & Business Services sector is the strongest in four years. In Sweden, employers report cautiously optimistic hiring sentiment for the coming quarter. Hiring prospects strengthen both quarter-over-quarter and year-over-year in the Finance & Business Services and Restaurants & Hotels sectors.

The weakest hiring pace in seven years is anticipated in Poland during the second quarter of 2020, with employers in six of the seven sectors expecting weaker forecasts than this time last year. Elsewhere in Eastern Europe, Romanian employers report a strengthening labor market, with outlooks improving in six of seven industry sectors in comparison with the prior quarter. Hiring intentions are strongest in the Construction and Finance & Business Services sectors, while the Restaurants & Hotels sector outlook is the strongest in 11 years.

The outlook for Croatia is one of the four strongest globally in the ManpowerGroup survey for 2Q 2020, matching Japan, Taiwan and Greece. The optimistic Croatian outlook is partially fuelled by brisk hiring pace for the Restaurants & Hotels sector. In Greece, employers continue to forecast active hiring intentions, driven in part by robust hiring plans in the Finance & Business Services sector.

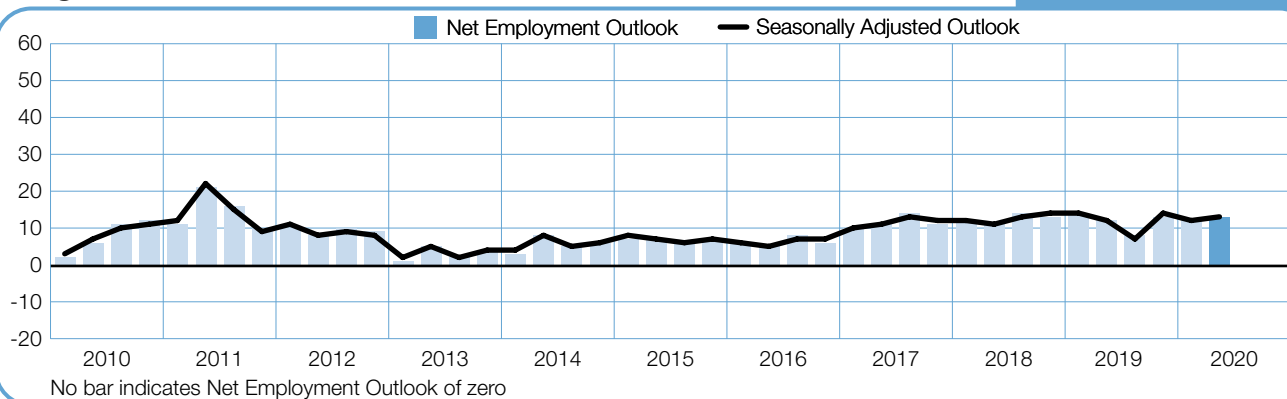
Austria

+10 (+8)%



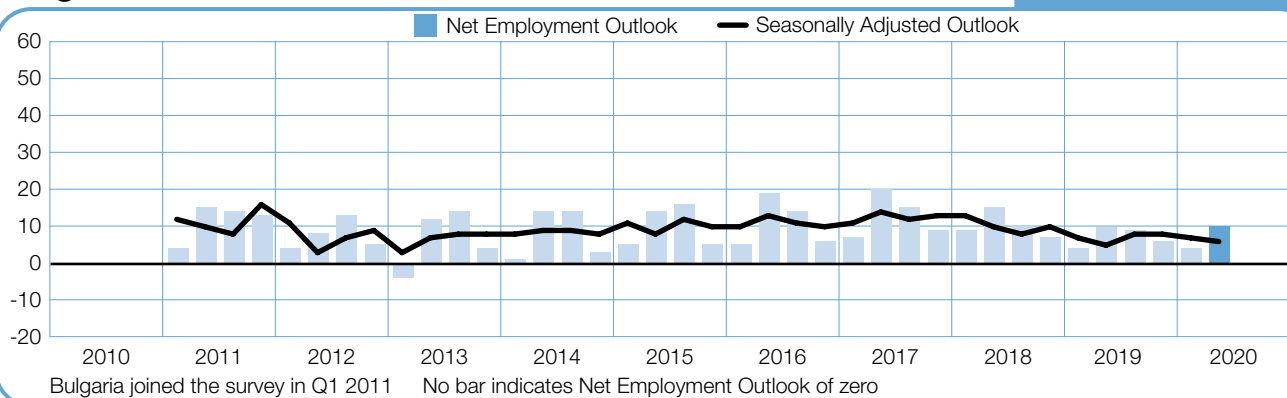
Belgium

+13 (+13)%



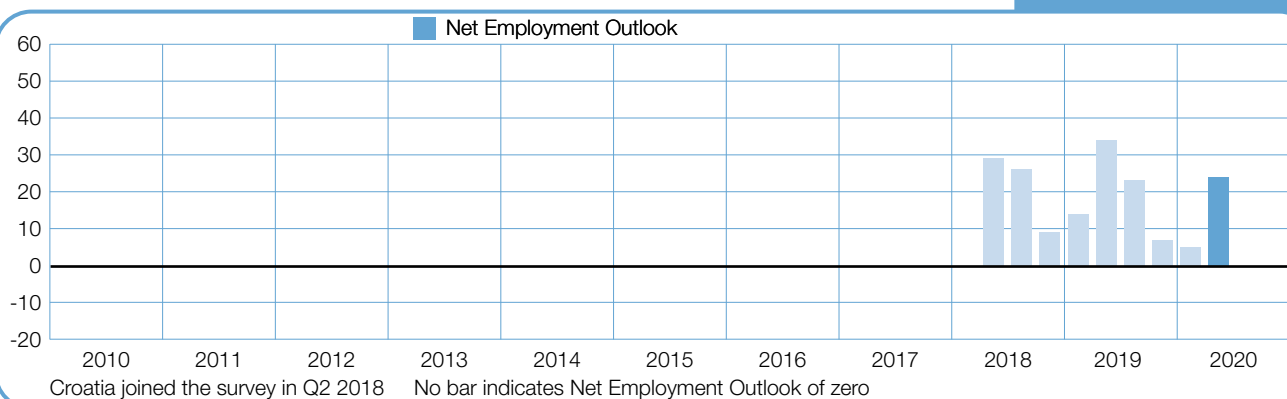
Bulgaria

+10 (+6)%



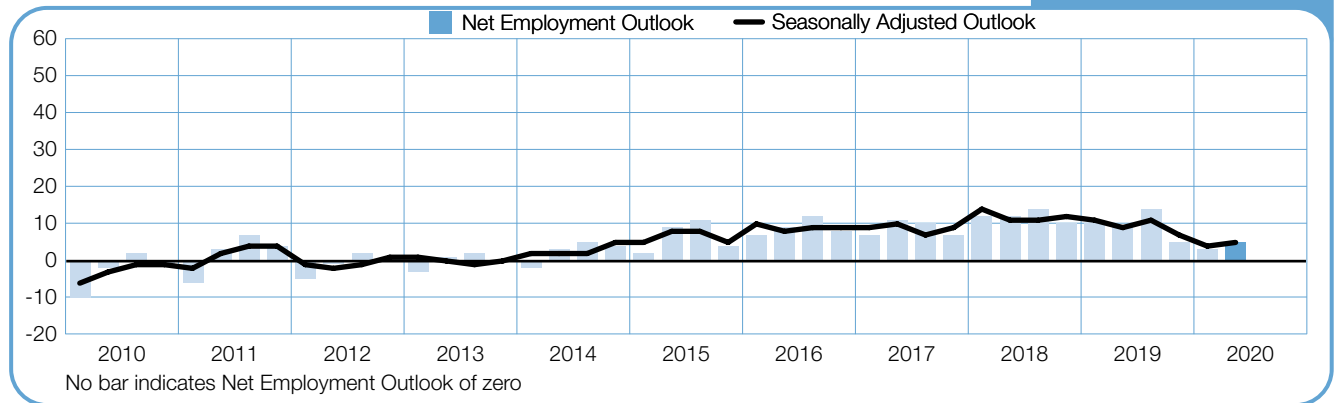
Croatia

+24%



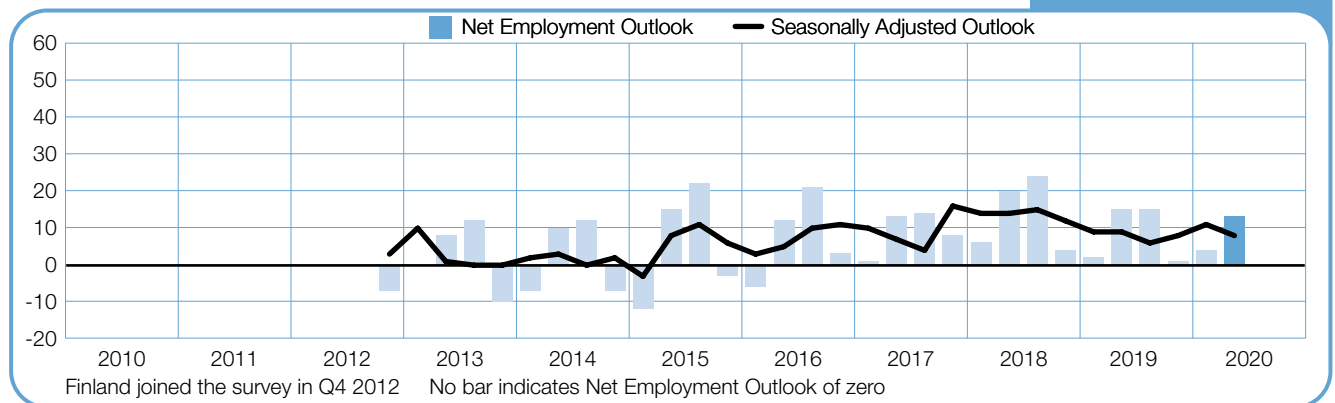
Czech Republic

+5 (+5)%



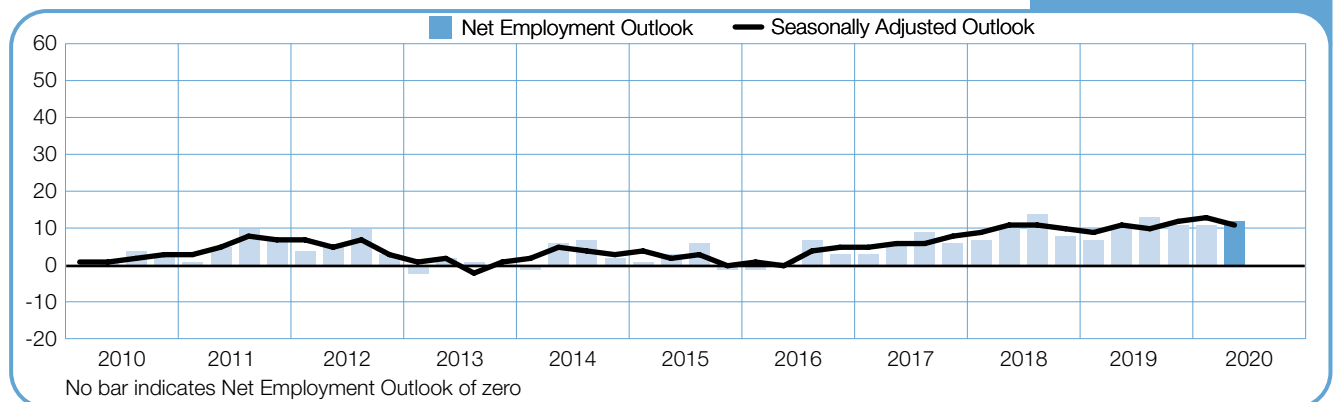
Finland

+13 (+8)%



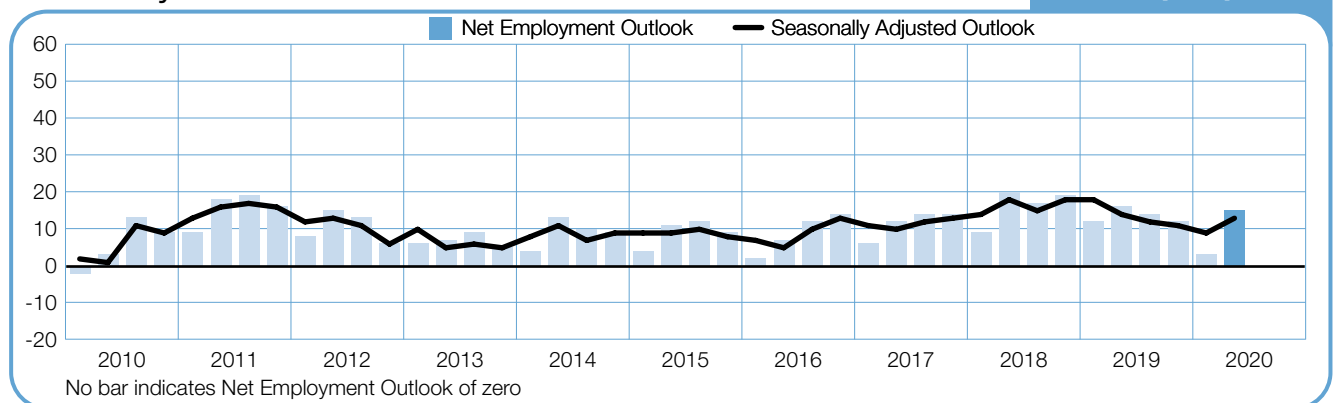
France

+12 (+11)%



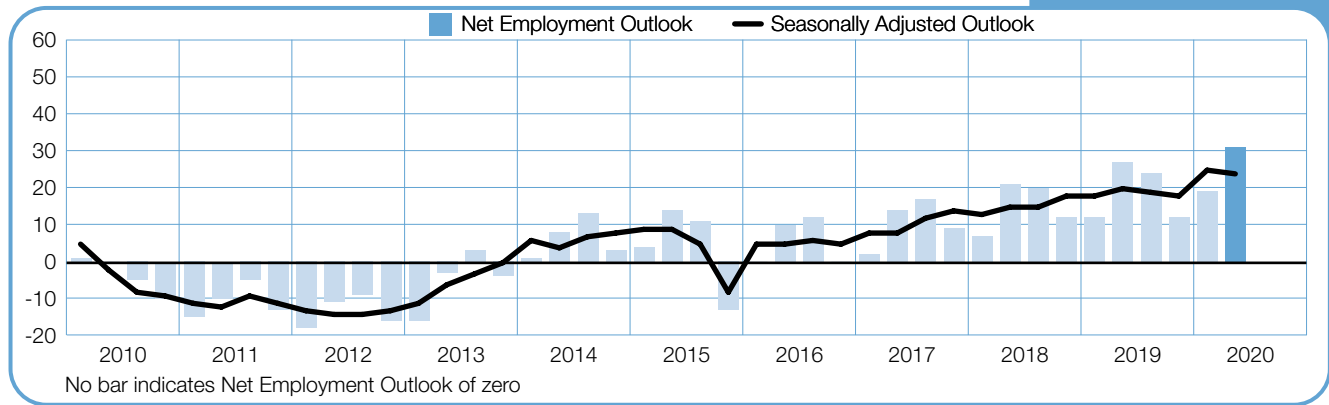
Germany

+15 (+13)%



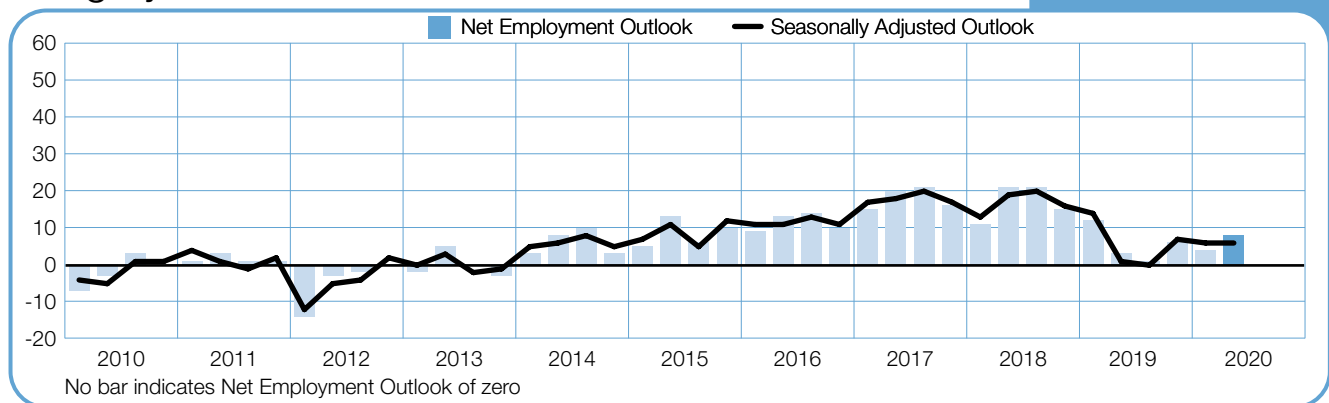
Greece

+31 (+24)%



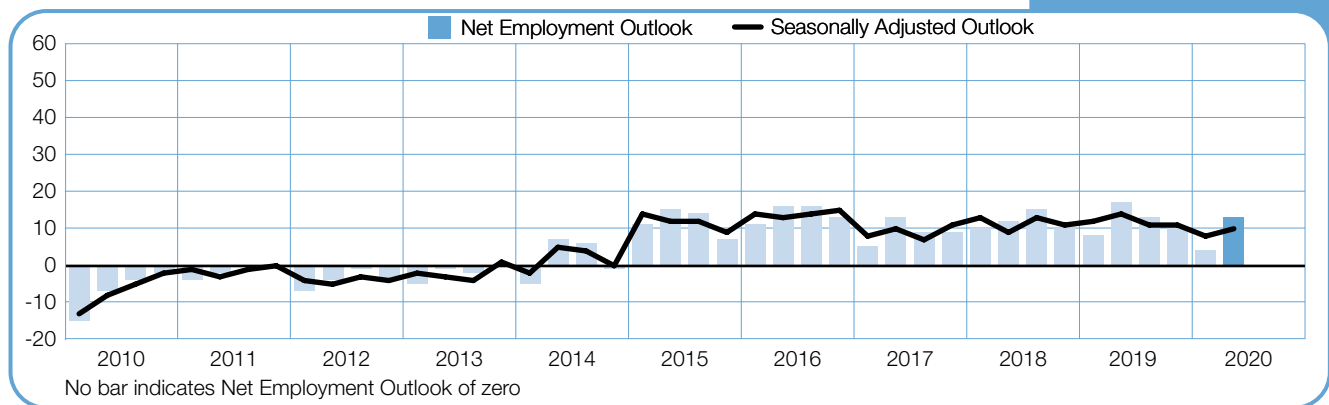
Hungary

+8 (+6)%



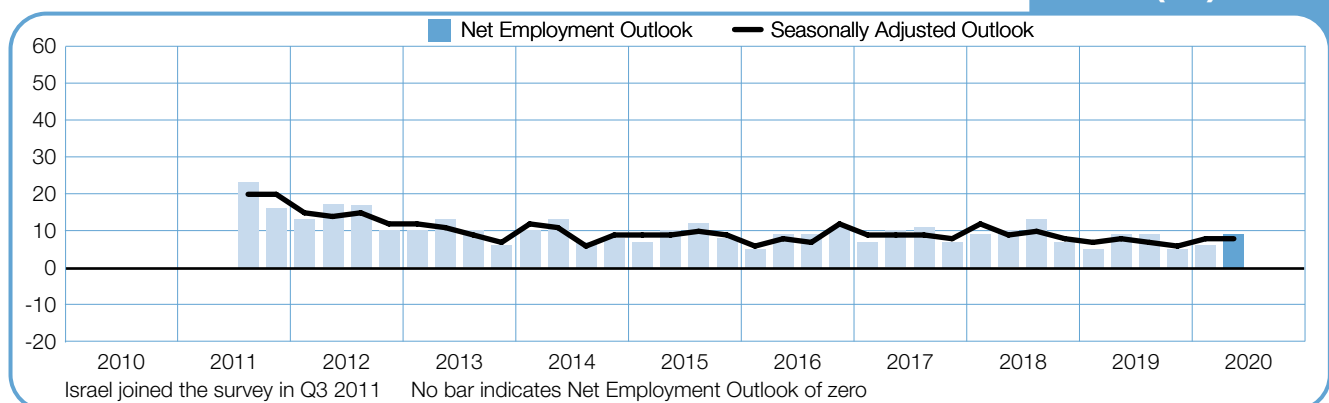
Ireland

+13 (+10)%



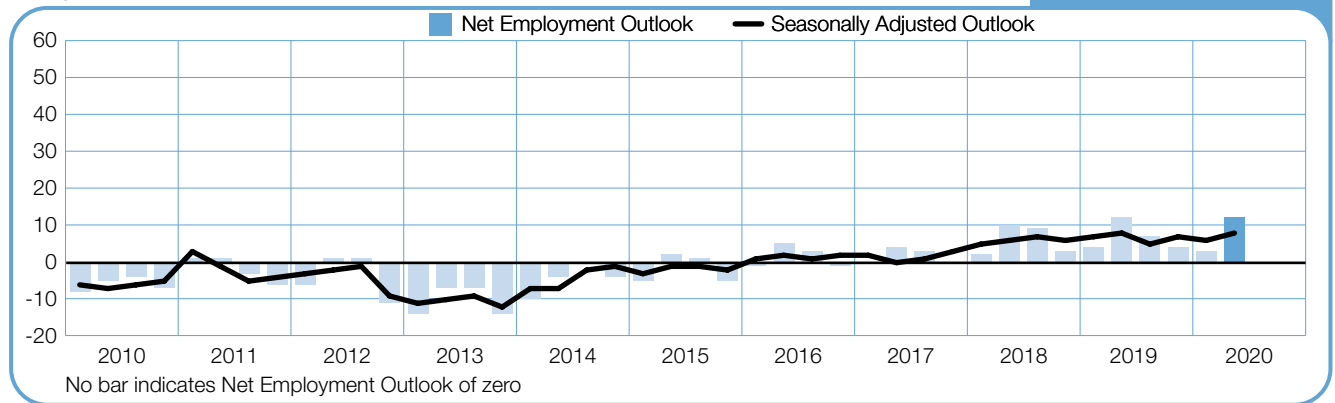
Israel

+9 (+8)%



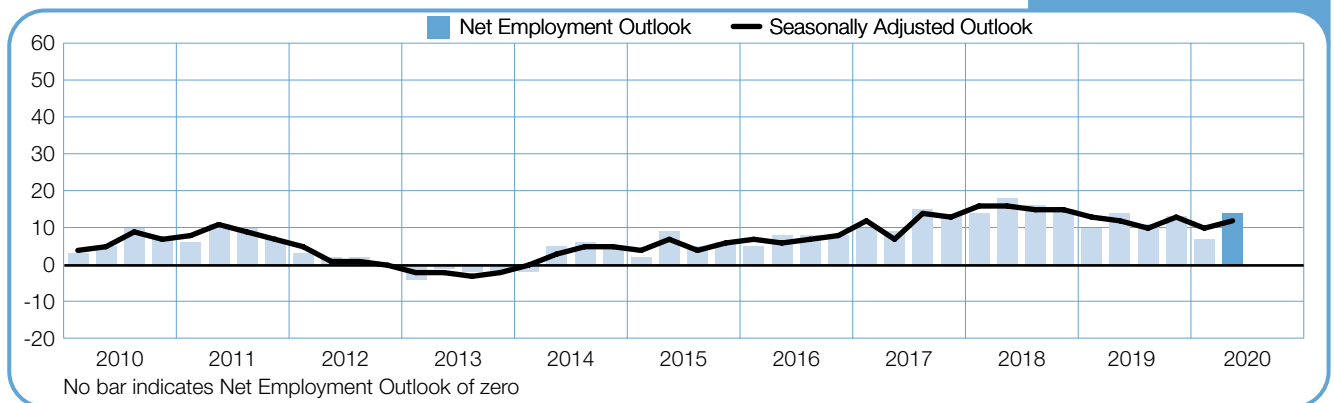
Italy

+12 (+8)%



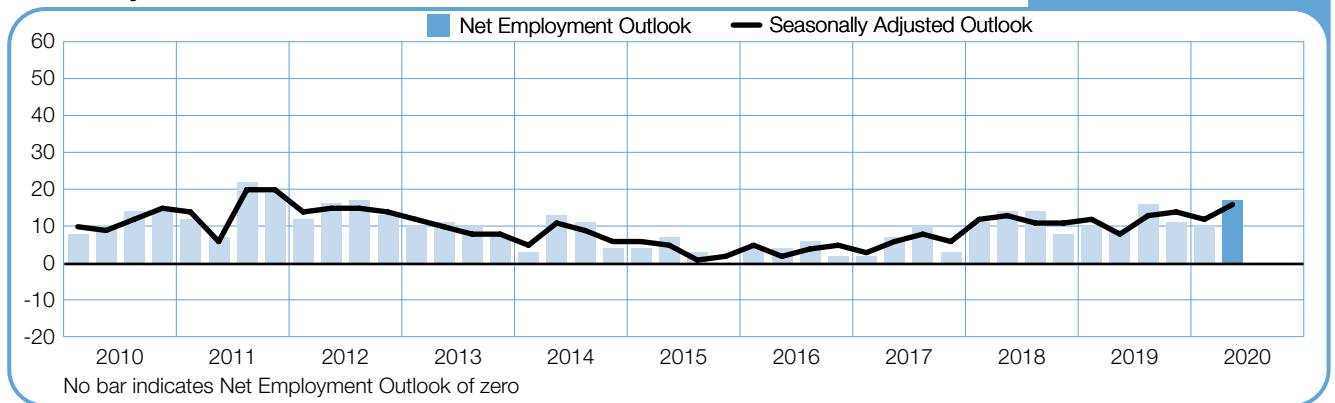
Netherlands

+14 (+12)%



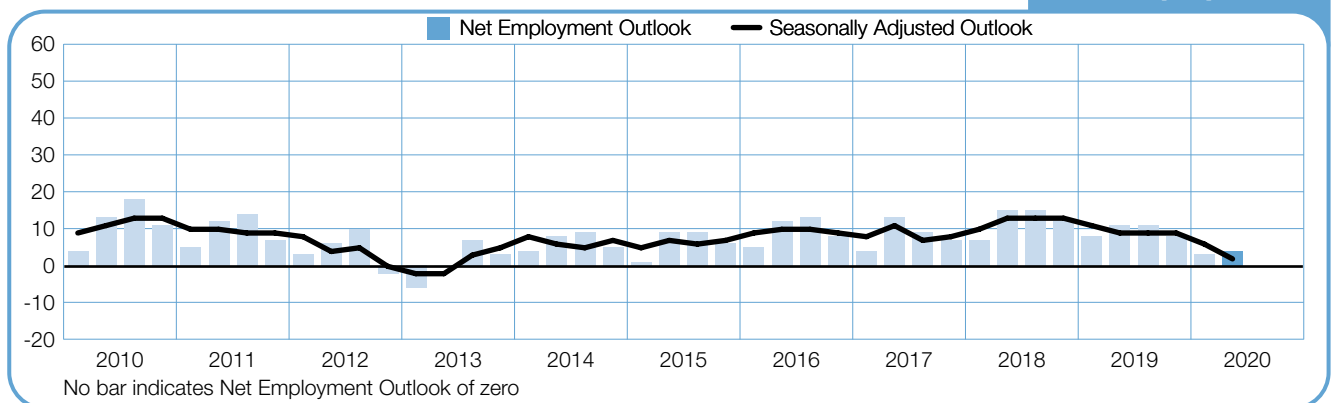
Norway

+17 (+16)%



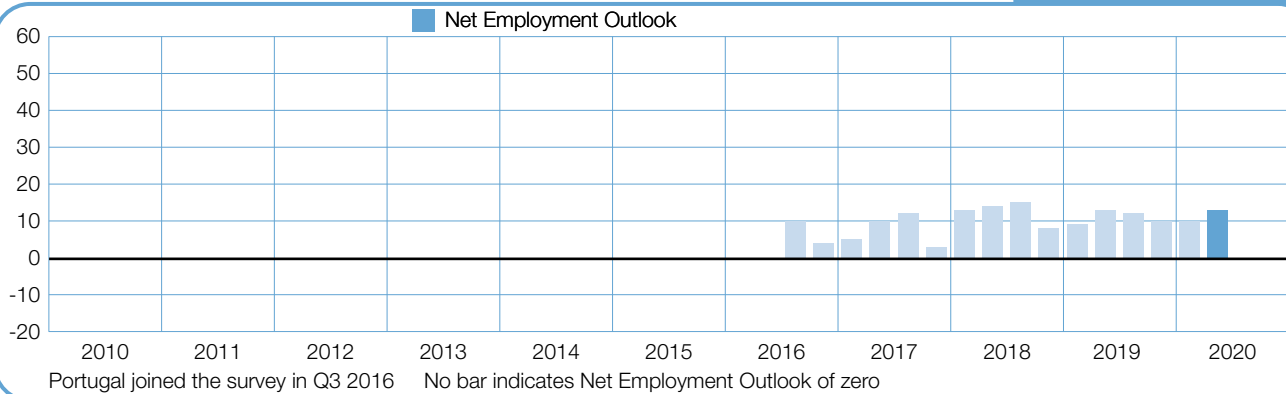
Poland

+4 (+2)%



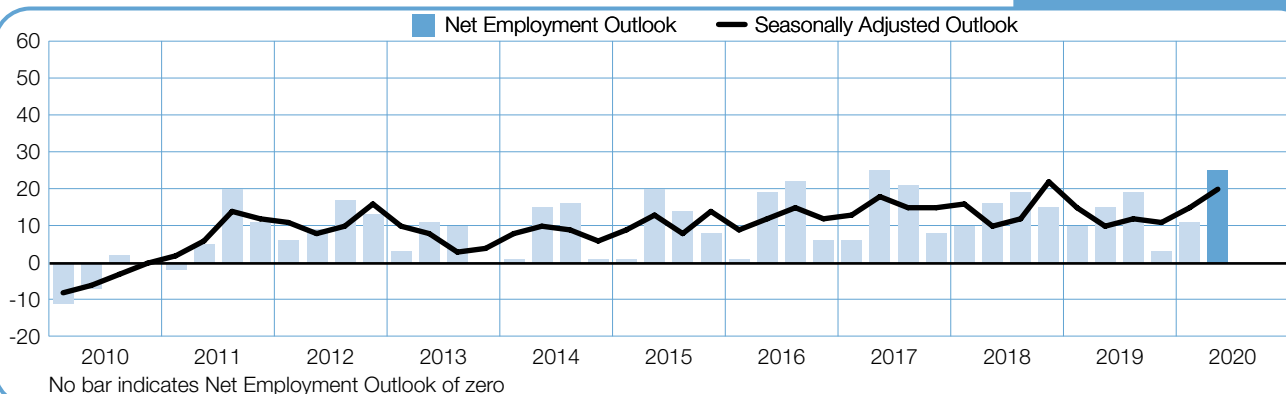
Portugal

+13%



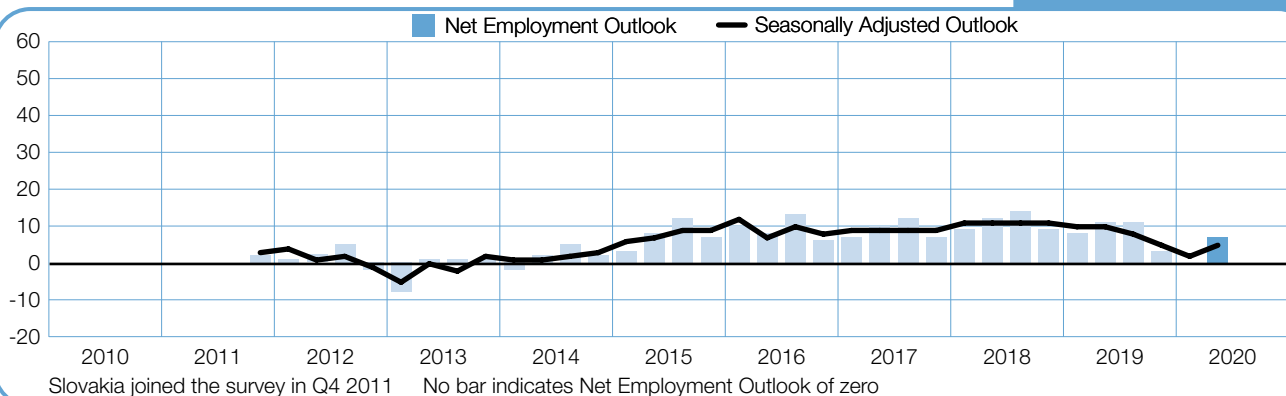
Romania

+25 (+20)%



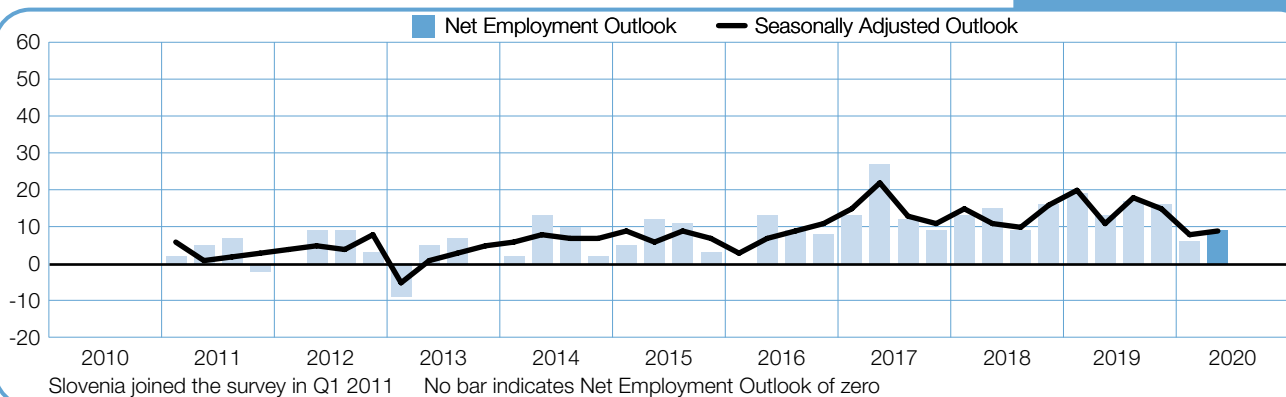
Slovakia

+7 (+5)%



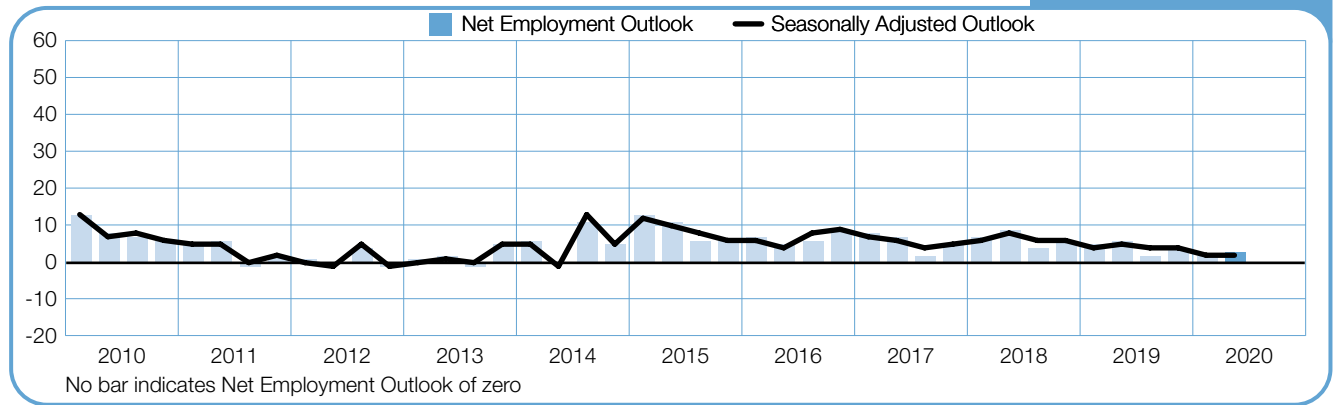
Slovenia

+9 (+9)%



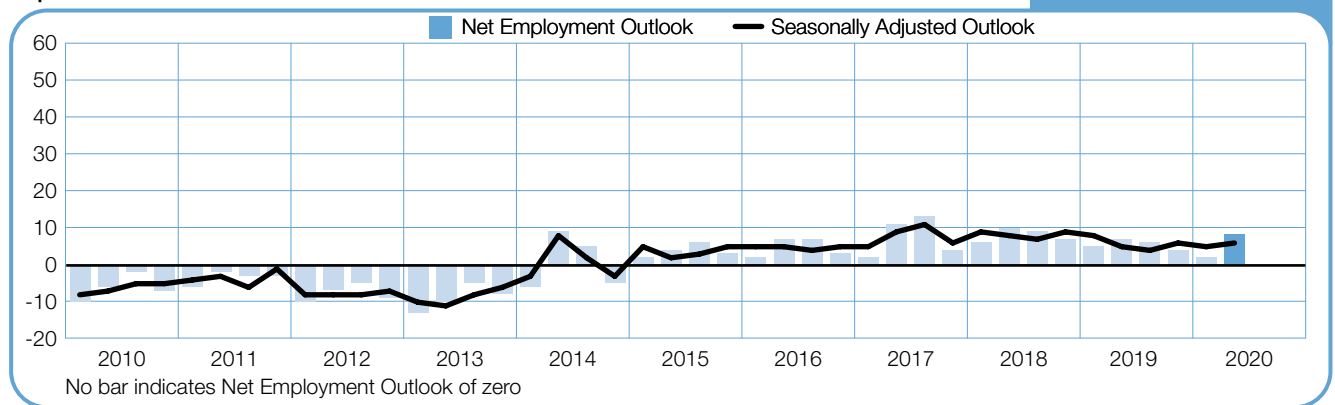
South Africa

+3 (+2)%



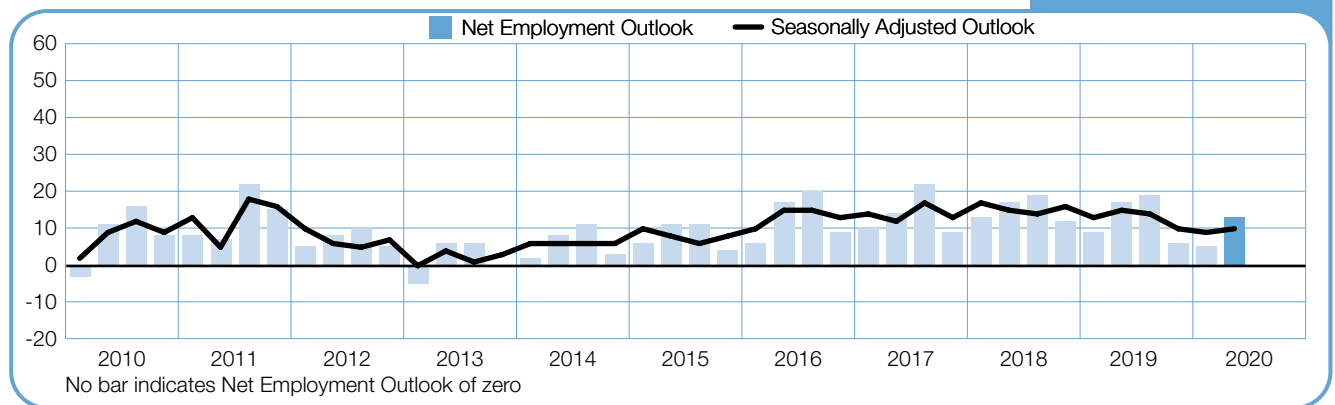
Spain

+8 (+6)%



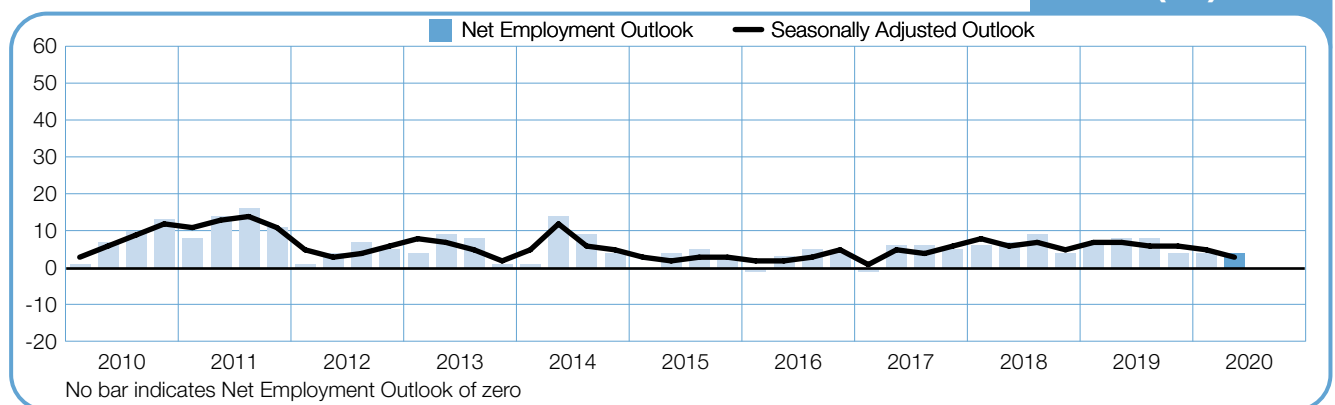
Sweden

+13 (+10)%



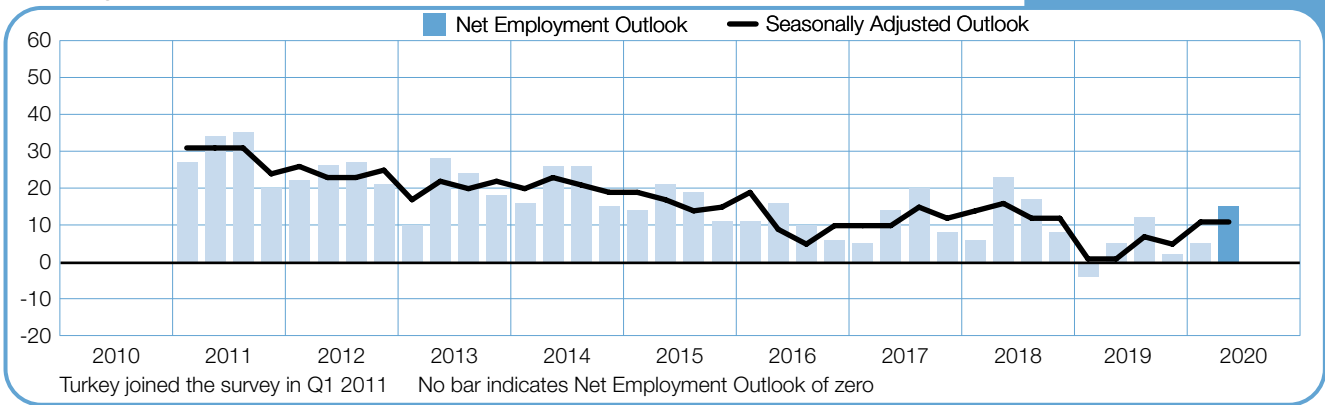
Switzerland

+4 (+3)%



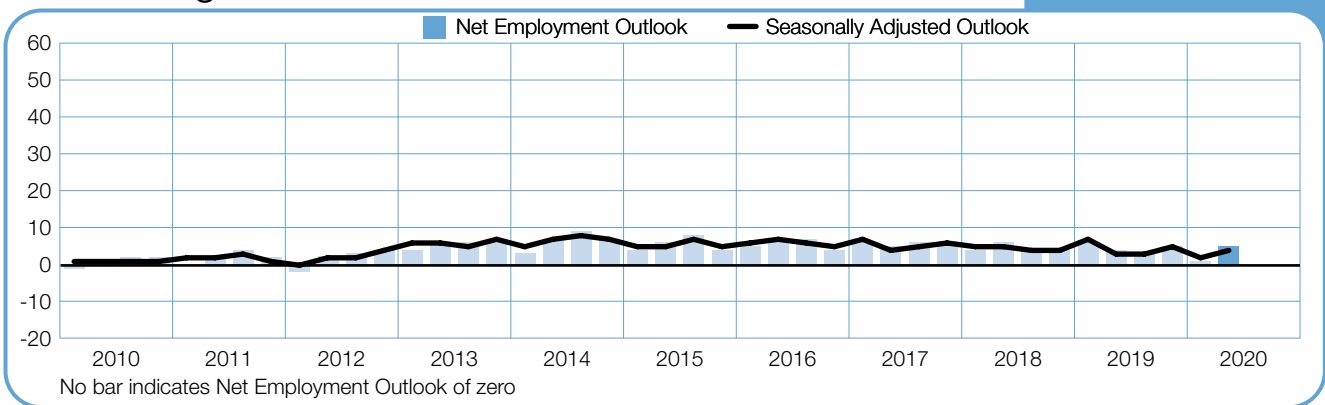
Turkey

+15 (+11)%



United Kingdom

+5 (+4)%



About the ManpowerGroup Employment Outlook Survey

The ManpowerGroup 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. ManpowerGroup's comprehensive forecast of employer hiring plans has been running for more than 55 years and is one of the most trusted surveys of employment activity in the world. Various factors underpin the success of the ManpowerGroup Employment Outlook Survey:

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

Projective: The ManpowerGroup 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 and territories in which it is conducted. The survey participants are not derived from ManpowerGroup's customer base.

Robust: The survey is based on interviews with over 58,000 public and private employers across 43 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 the 2Q 2020 research, 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 2020 as compared to the current quarter?"

Methodology

The ManpowerGroup Employment Outlook Survey is conducted using a validated methodology, in accordance with the highest standards in market research. The survey has been structured to be representative of each national economy. The margin of error for almost all national, regional and global data is not greater than +/- 4.0%.

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. Net Employment Outlooks for countries and territories that have accumulated at least 17 quarters of data are reported in a seasonally adjusted format unless otherwise stated.

Seasonal Adjustment

Seasonal adjustments have been applied to the data for all participating countries except Croatia and Portugal. 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 fourth quarter. ManpowerGroup 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 fourth 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 third 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 in the fourth quarter for 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.
- 2013** ManpowerGroup Hungary operation begins reporting seasonally adjusted data in the third quarter and the Brazil operation begins reporting seasonally adjusted data in the fourth quarter.
- 2014** Survey data for Bulgaria, Panama, Slovenia and Turkey are seasonally adjusted for the first time.
- 2018** ManpowerGroup operations in Croatia launch the ManpowerGroup Employment Outlook Survey.

About ManpowerGroup

ManpowerGroup® (NYSE: MAN), the leading global workforce solutions company, helps organizations transform in a fast-changing world of work by sourcing, assessing, developing and managing the talent that enables them to win. We develop innovative solutions for hundreds of thousands of organizations every year, providing them with skilled talent while finding meaningful, sustainable employment for millions of people across a wide range of industries and skills. Our expert family of brands – Manpower, Experis and Talent Solutions – creates substantially more value for candidates and clients across 80 countries and territories and has done so for over 70 years. In 2019, ManpowerGroup was named one of Fortune's Most Admired Companies for the seventeenth year and – in 2020 – one of the World's Most Ethical Companies for the eleventh year, confirming our position as the most trusted brand in the industry.

See how ManpowerGroup is powering the future of work: www.manpowergroup.com

ManpowerGroup™ in Poland

ManpowerGroup, the world leader in innovative workforce solutions, has been helping clients and candidates win in Poland since March 2001. With nearly 70 branches in 44 cities across the nation, ManpowerGroup in Poland provides unique value to clients and candidates through ManpowerGroup™ Solutions, Manpower® and Experis™. ManpowerGroup's portfolio in Poland covers temporary work, permanent and contract recruitment; employee assessment and selection; outsourcing and workforce consulting; career management and outplacement.

More information is available at www.manpowergroup.pl.

ManpowerGroup, ul. Prosta 68, 00-838 Warszawa
Tel.: (+48) 22 50 40 715, manpowergroup@pl.manpowergroup.com
www.manpowergroup.pl

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