

ManpowerGroup Employment Outlook Survey Poland

A ManpowerGroup Research Report

Q3 2021



ManpowerGroup™

Poland ManpowerGroup Employment Outlook Survey

The ManpowerGroup Employment Outlook Survey for the third quarter 2021 was conducted by interviewing a representative sample of 607 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 September 2021 as compared to the current quarter?”*

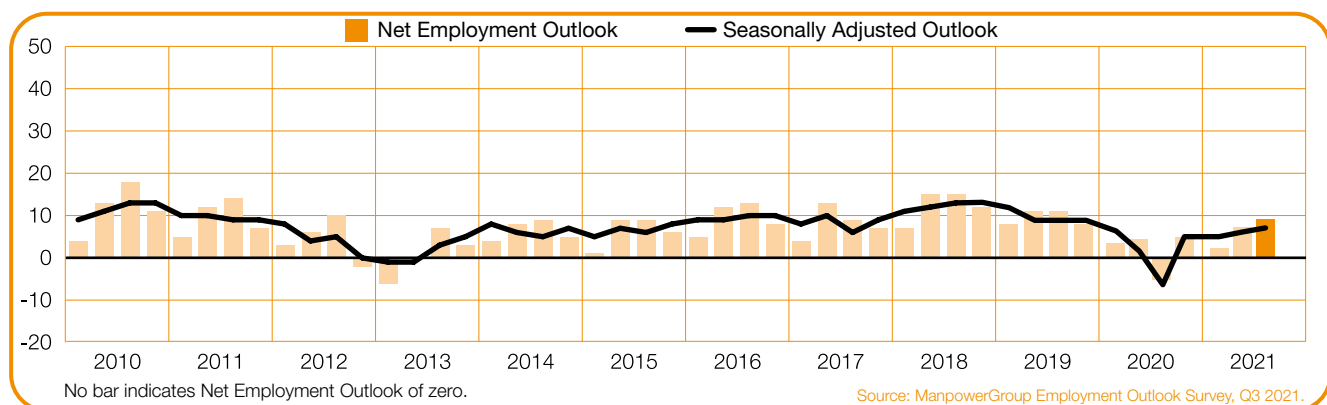
Contents

Poland Employment Outlook	1
Organization-Size Comparisons	
Regional Comparisons	
Sector Comparisons	
<hr/>	
Global Employment Outlook	12
International Comparisons – Americas	
International Comparisons – Asia-Pacific	
International Comparisons – EMEA	
<hr/>	
About the Survey	29
<hr/>	
About ManpowerGroup™	32
<hr/>	

Poland Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted Outlook
	%	%	%	%	%	%
Q3 2021	11	2	84	3	+9	+7
Q2 2021	10	3	83	4	+7	+6
Q1 2021	6	4	86	4	+2	+5
Q4 2020	9	4	83	4	+5	+5
Q3 2020	6	11	72	11	-5	-7

Source: ManpowerGroup Employment Outlook Survey, Q3 2021.



Interviewing was carried out during the exceptional circumstances of the COVID-19 outbreak. The survey findings for the third quarter of 2021 are likely to reflect the impact of the global health emergency, and may be notably different to previous quarters.

Polish employers report cautiously optimistic hiring plans for the July to September period. With 11% of employers expecting to increase payrolls, 2% forecasting a decrease and 84% anticipating no change, the resulting Net Employment Outlook is +9%.

Once the data is adjusted to allow for seasonal variation, the Outlook stands at +7%. Hiring intentions remain relatively stable in comparison with the prior quarter, and improve by 14 percentage points when compared with the third quarter of 2020, when the COVID-19 pandemic first had an impact on hiring sentiment.

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.

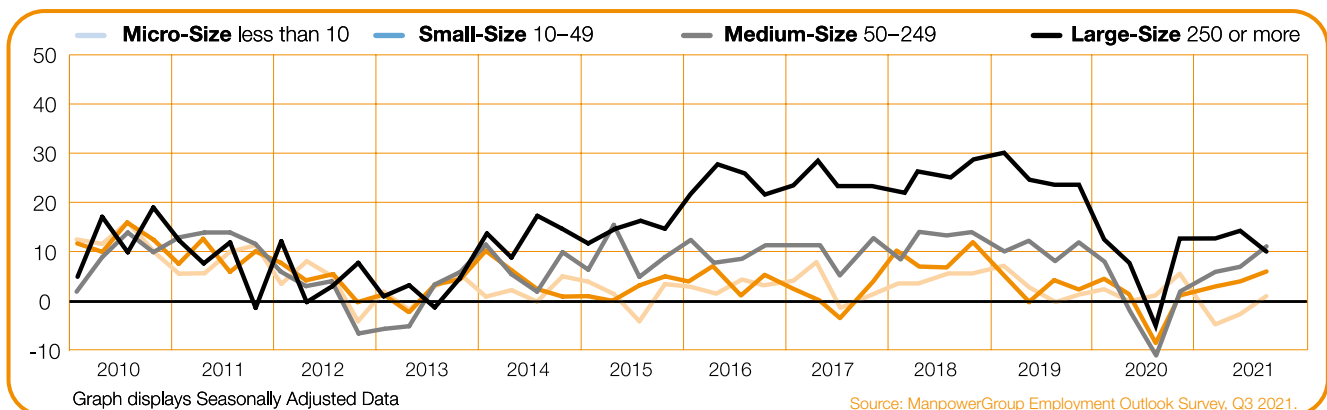
Workforce gains are forecast for all four organization size categories during the upcoming quarter. Medium employers report the strongest hiring sentiment with a Net Employment Outlook of +11%, while the Outlook for Large employers is +10%. Elsewhere, Outlooks stand at +6% and +1% in the Small- and Micro-size categories, respectively.

Medium employers report a slight improvement of 4 percentage points when compared with the previous quarter, and Outlooks increase by 3 and 2 percentage points for Micro- and Small-size employers, respectively. However, the Outlook for Large employers declines by 3 percentage points.

In a comparison with the third quarter of 2020 – when COVID-19 first had an impact on hiring prospects – Medium employers report a sharp improvement of 23 percentage points, while Outlooks are 14 percentage points stronger for Small- and Large-size employers. Meanwhile, hiring plans remain relatively stable in the Micro employer category.

Organization-Size	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted Outlook
	%	%	%	%	%	%
Micro-Size less than 10	5	2	92	1	+3	+1
Small-Size 10–49	10	3	83	4	+7	+6
Medium-Size 50–249	13	3	80	4	+10	+11
Large-Size 250 or more	14	2	80	4	+12	+10

Source: ManpowerGroup Employment Outlook Survey, Q3 2021.

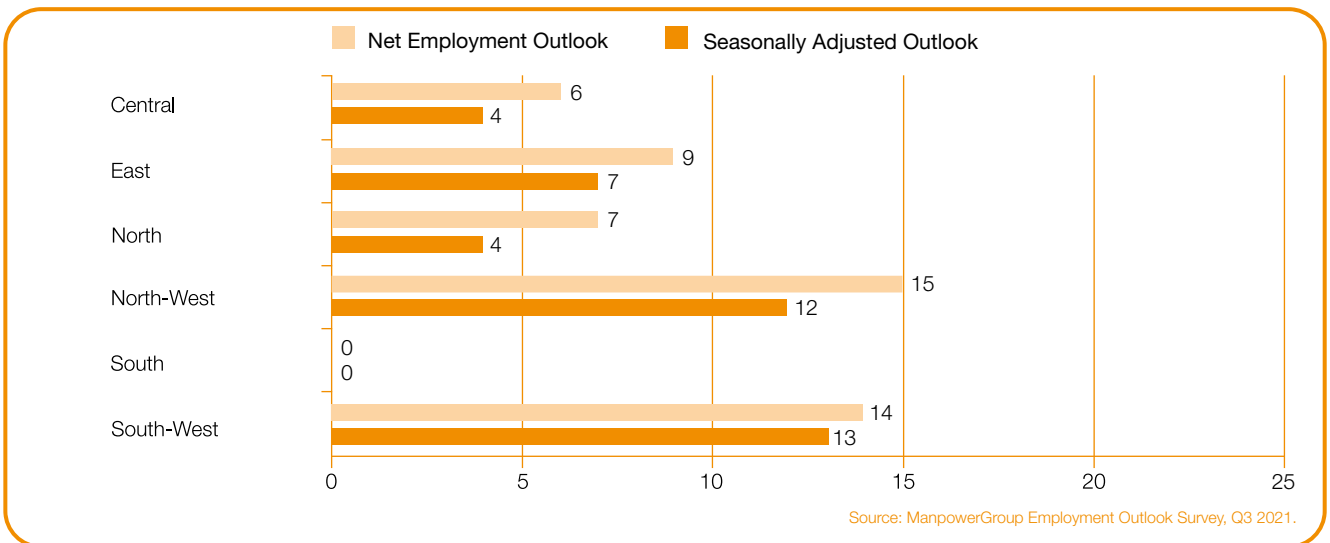


Regional Comparisons

Payroll gains are forecast for five of the six regions during the forthcoming quarter, with the strongest hiring climate anticipated in the South-West, where the Net Employment Outlook is +13%. Employers in the North-West also expect a steady hiring pace, reporting an Outlook of +12%, while the Outlook for the East is +7%. In both Central Poland and the North, employers anticipate limited job gains with Outlooks of +4%. However, a flat labor market is forecast in the South where the Outlook stands at 0%.

Hiring prospects strengthen in three of the six regions when compared with the previous quarter. North-West employers report an increase of 4 percentage points, while Outlooks are 3 and 2 percentage points stronger in the South-West and the Central region, respectively. Elsewhere, hiring intentions remain relatively stable.

When compared with this time one year ago – the quarter in which COVID-19 first had an impact on hiring plans – Outlooks strengthen in all six regions. A sharp increase of 23 percentage points is reported in the North-West, while Outlooks are 17 and 14 percentage points stronger in Central Poland and the North, respectively. Employers in the South report an improvement of 12 percentage points, and the South-West Outlook is 8 percentage points stronger.

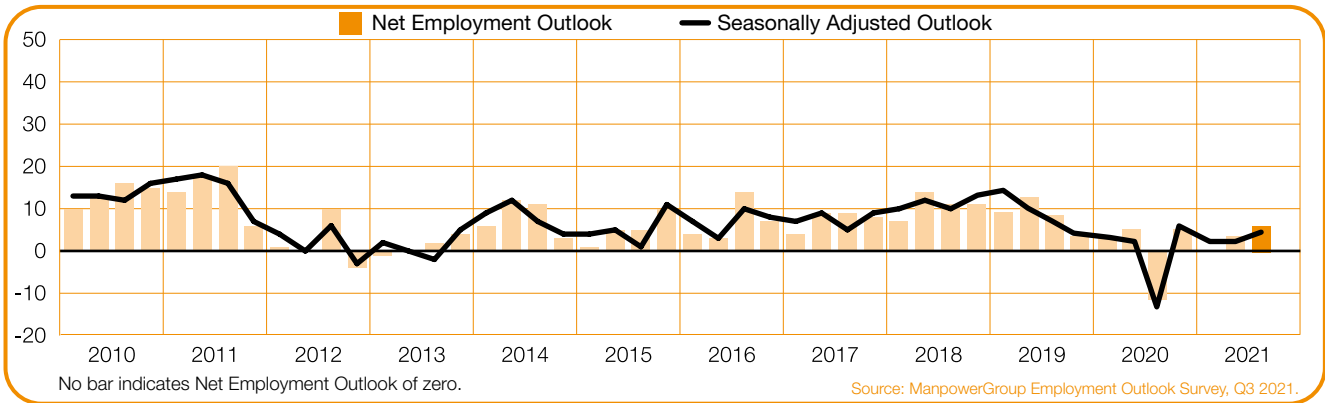


* Regions of Poland according to Eurostat: Central (łódzkie, mazowieckie), East (lubelskie, podkarpackie, świętokrzyskie, podlaskie), North (kujawsko-pomorskie, warmińsko-mazurskie, pomorskie), North-West (wielkopolskie, zachodniopomorskie, lubuskie), South (małopolskie, śląskie), South-West (dolnośląskie,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

+4%

Central

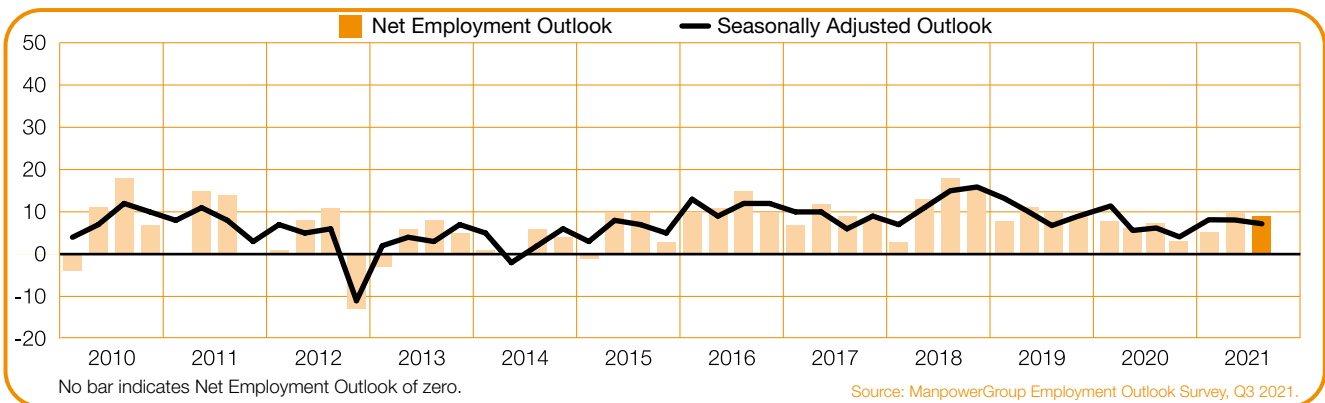
Employers expect slow-paced workforce gains during the next three months, reporting a Net Employment Outlook of +4%. Hiring plans improve by 2 percentage points in comparison with the prior quarter and are 17 percentage points stronger when compared with this time one year ago.



+7%

East

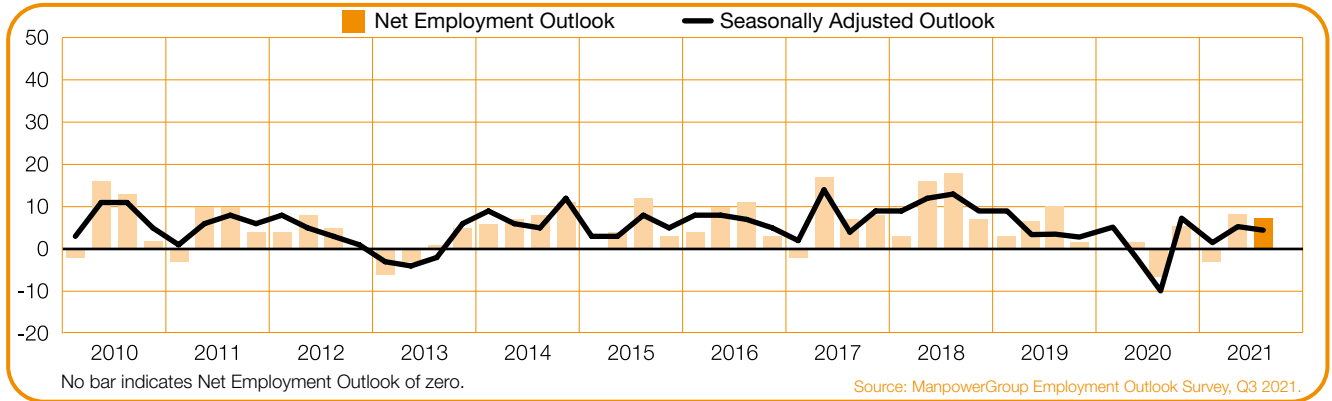
With a Net Employment Outlook of +7%, employers expect the fair hiring climate to continue during the upcoming quarter. Hiring prospects remain relatively stable in comparison with both the prior quarter and last year at this time.



+4%

North

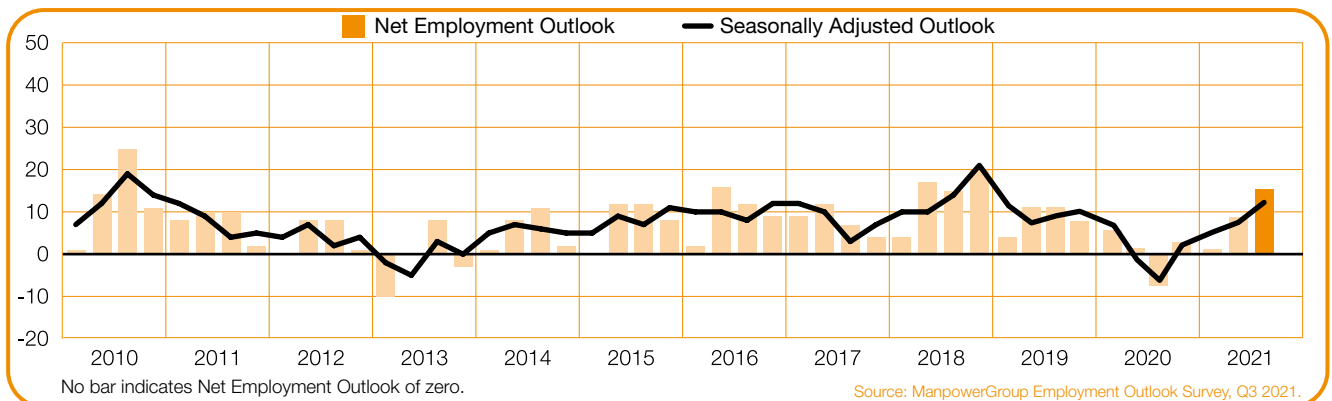
Job seekers can expect a quiet labor market in the third quarter of 2021, according to employers who report a Net Employment Outlook of +4%. The Outlook remains relatively stable quarter-over-quarter, but improves by a considerable margin of 14 percentage points when compared with this time one year ago.



+12%

North-West

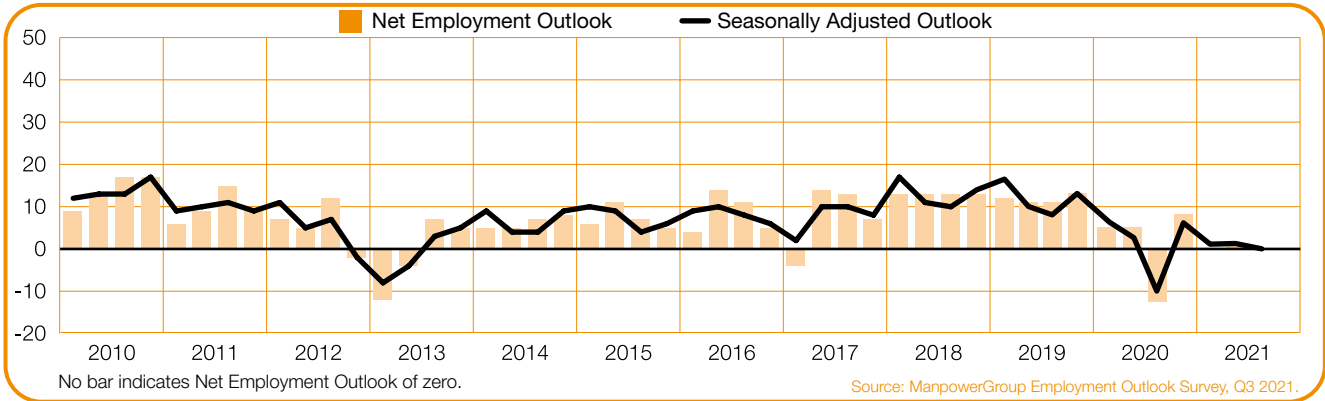
The strongest hiring pace in more than two years is anticipated in the July to September period, with employers reporting a Net Employment Outlook of +12%. Hiring intentions are 4 percentage points stronger in comparison with the prior quarter and improve by 23 percentage points year-over-year.



0%

South

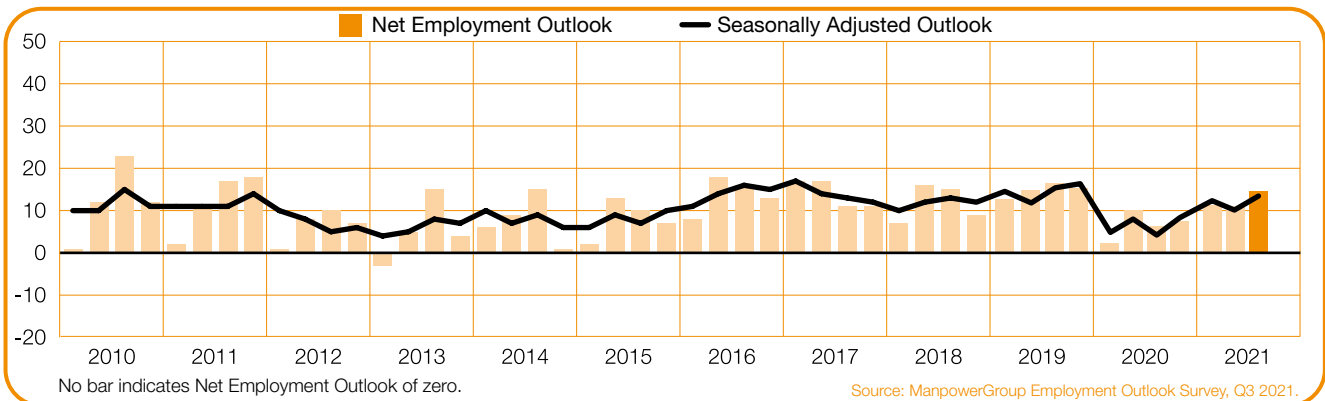
With a flat Net Employment Outlook of 0%, employers report subdued hiring plans for the coming quarter. The Outlook remains relatively stable when compared with the previous quarter and is 12 percentage points stronger when compared with 3Q 2020.



+13%

South-West

Employers forecast respectable payroll gains in the third quarter of 2021, reporting a Net Employment Outlook of +13%. Hiring plans are 3 percentage points stronger quarter-over-quarter and improve by 8 percentage points in comparison with last year at this time.



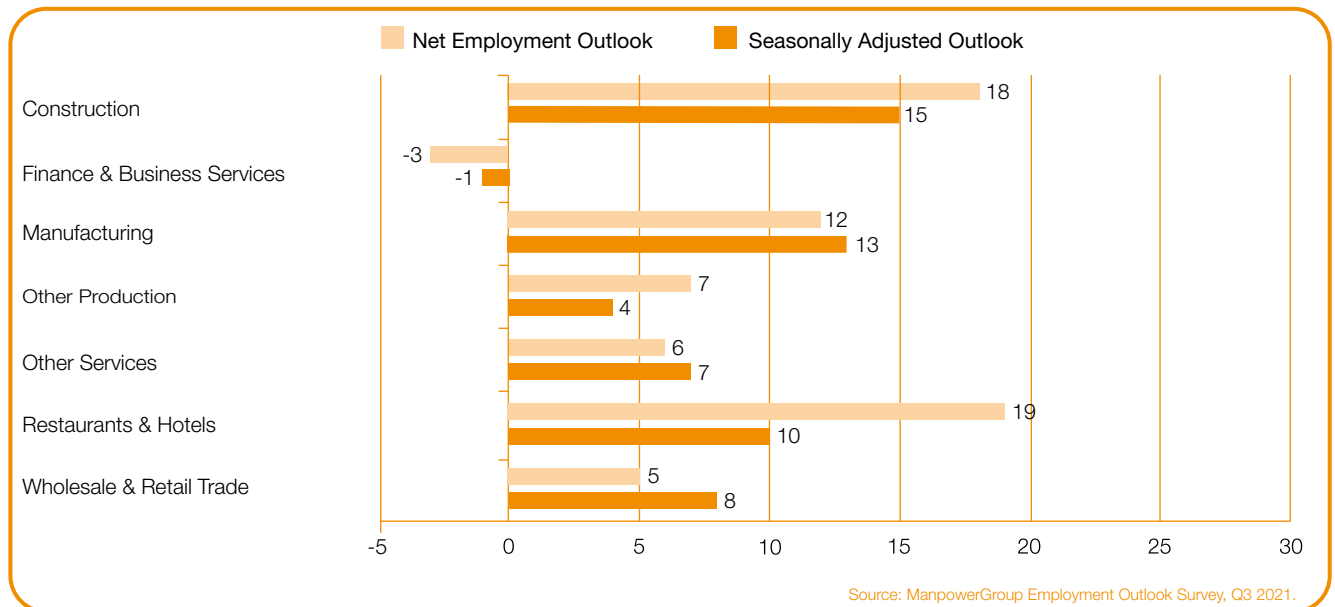
Sector Comparisons

Employers in six of the seven industry sectors expect to increase payrolls during the forthcoming quarter. The strongest hiring prospects are reported by employers in the Construction sector and the Manufacturing sector, with Net Employment Outlooks standing at +15% and +13%, respectively. Restaurants & Hotels sector employers report cautiously optimistic hiring plans with an Outlook of +10%, while the Wholesale & Retail Trade sector Outlook is +8%. A conservative hiring pace is forecast for the Other Services sector, where the Outlook is +7%, and the Other Production sector Outlook is +4%. However, Finance & Business Services sector employers report uncertain hiring plans with an Outlook of -1%.

Hiring intentions strengthen in five of the seven industry sectors when compared with the previous quarter. The most notable improvement of 11 percentage points is reported in the Restaurants & Hotels sector, while Other Services sector

employers report an increase of 5 percentage points. Elsewhere, Outlooks are 2 percentage points stronger in both the Construction sector and the Manufacturing sector. Meanwhile, hiring sentiment declines by 4 percentage points in the Finance & Business Services sector.

In a comparison with this time one year ago – when COVID-19 first had an impact on hiring intentions – hiring prospects improve in six of the seven industry sectors. A sharp increase of 41 percentage points is reported in the Restaurants & Hotels sector, while Outlooks are 20 percentage points stronger in both the Construction sector and the Manufacturing sector. Wholesale & Retail Trade sector employers report an improvement of 12 percentage points, and the Outlook for the Other Services sector strengthens by 9 percentage points. Elsewhere, hiring plans remain relatively stable in the Finance & Business Services sector.



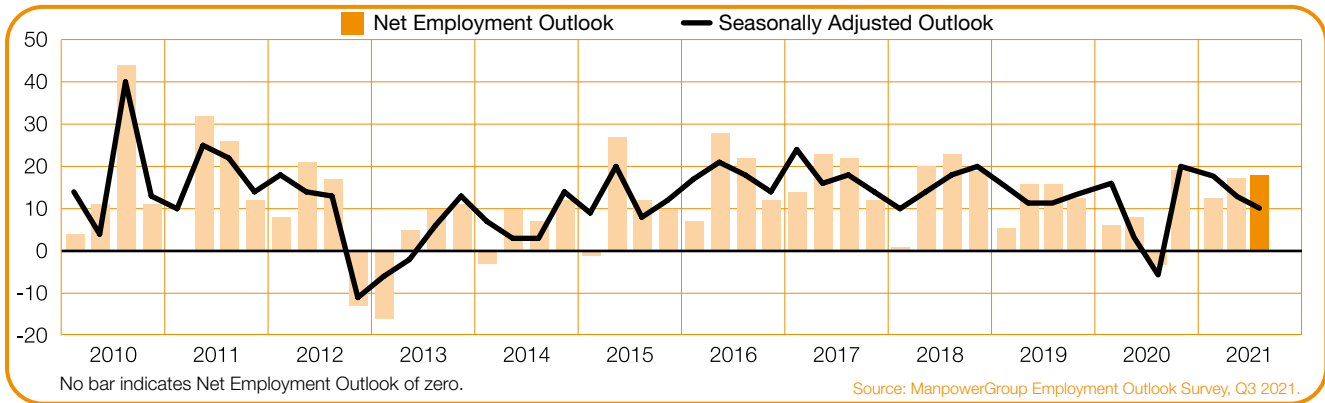
¹ Other Services – from the second quarter of 2020 in the report the name will present cumulative data on sectors: Social & Public and Transport, Storage & Communications. Data on these sectors have also been aggregated for archival data.

² Other Production – from the second quarter of 2020 in 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.

+15%

Construction

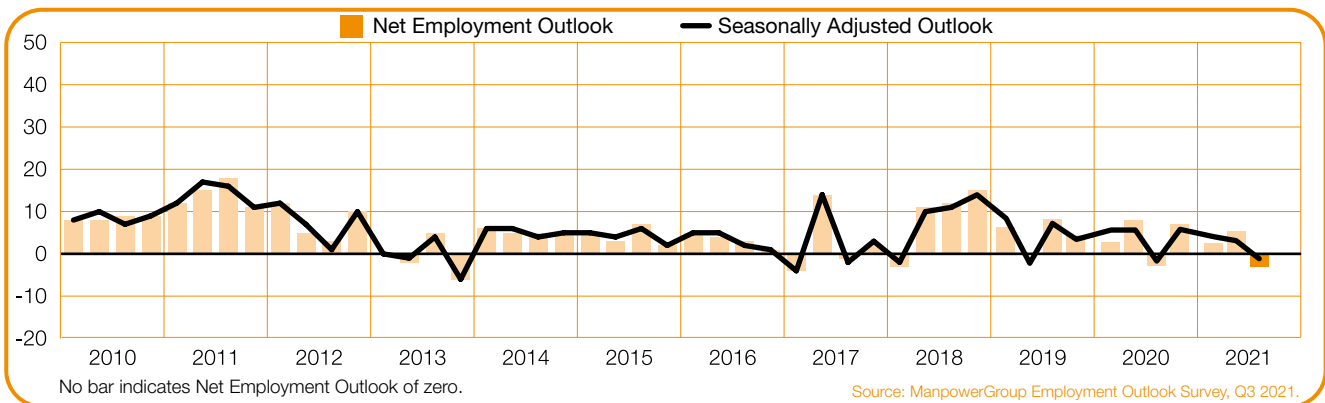
Reporting a Net Employment Outlook of +15%, employers anticipate positive payroll gains during the upcoming quarter. Hiring plans improve by 2 percentage points when compared with the previous quarter and are 20 percentage points stronger in comparison with last year at this time.



-1%

Finance & Business Services

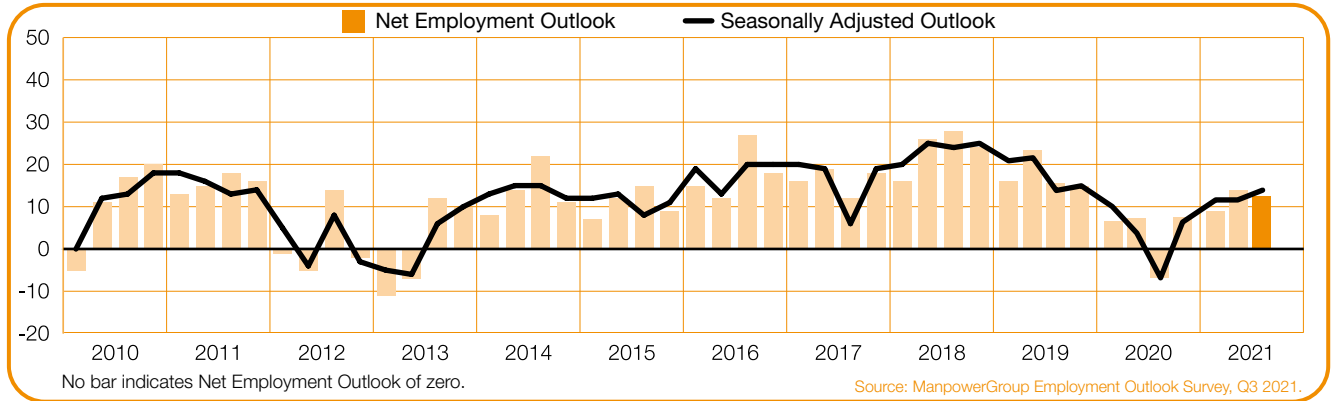
The weakest labor market in two years is anticipated during the July to September period, with employers reporting an uncertain Net Employment Outlook of -1%. The Outlook declines by 4 percentage points when compared with the previous quarter, while remaining relatively stable in comparison with last year at this time.



+13%

Manufacturing

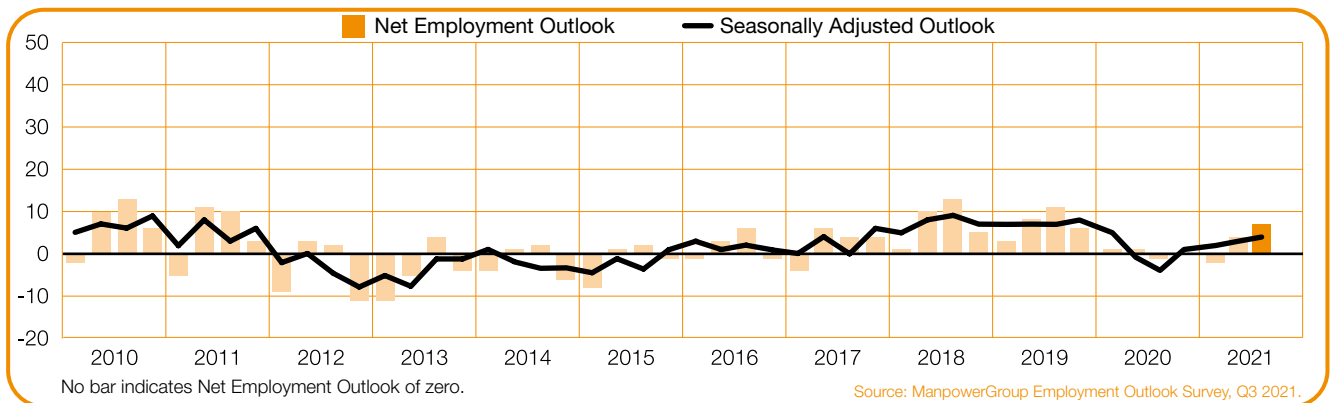
Job seekers can expect a steady hiring pace in the third quarter of 2021, according to employers who report a Net Employment Outlook of +13%. The Outlook improves by 2 percentage points quarter-over-quarter and increases by a considerable margin of 20 percentage points when compared with this time one year ago.



+4%

Other Production

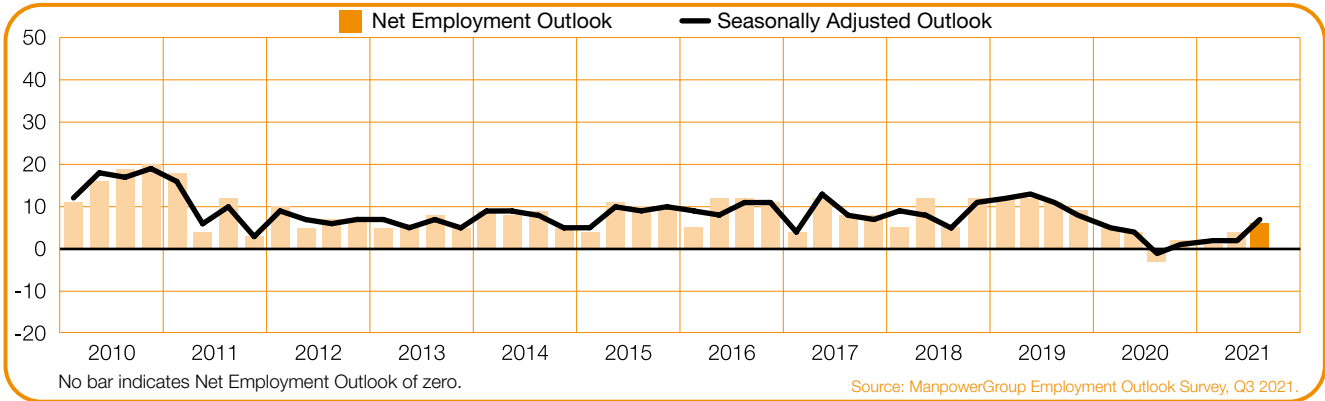
Employers expect the soft labor market to continue in the next three months, reporting a Net Employment Outlook of +4%. Hiring sentiment remains relatively stable in comparison with the prior quarter, while improving by 8 percentage points when compared with the third quarter of 2020.



+7%

Other Services

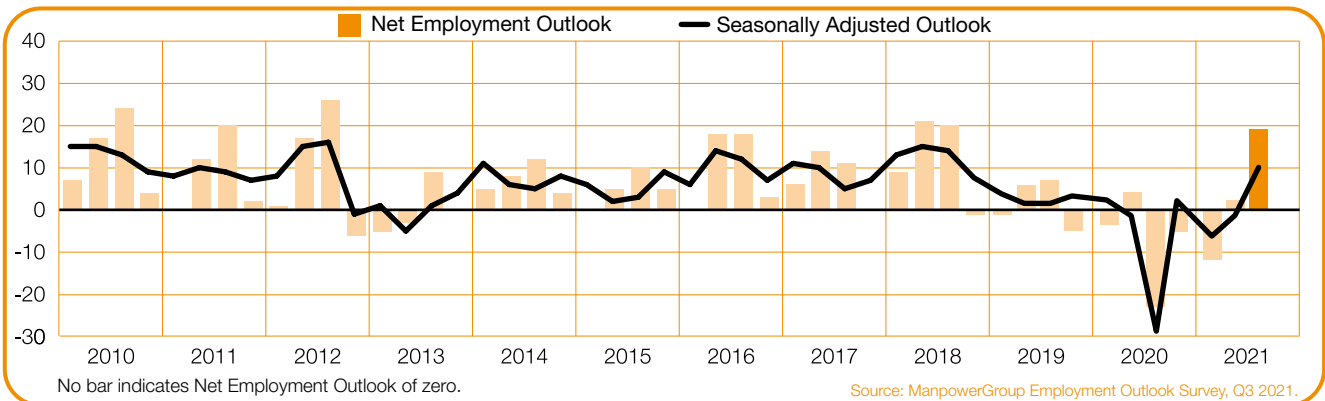
Employers expect some hiring opportunities in the third quarter of 2021, reporting a Net Employment Outlook of +7%. Hiring prospects improve by 5 percentage points in comparison with the prior quarter and by 9 percentage points year-over-year.



+10%

Restaurants & Hotels

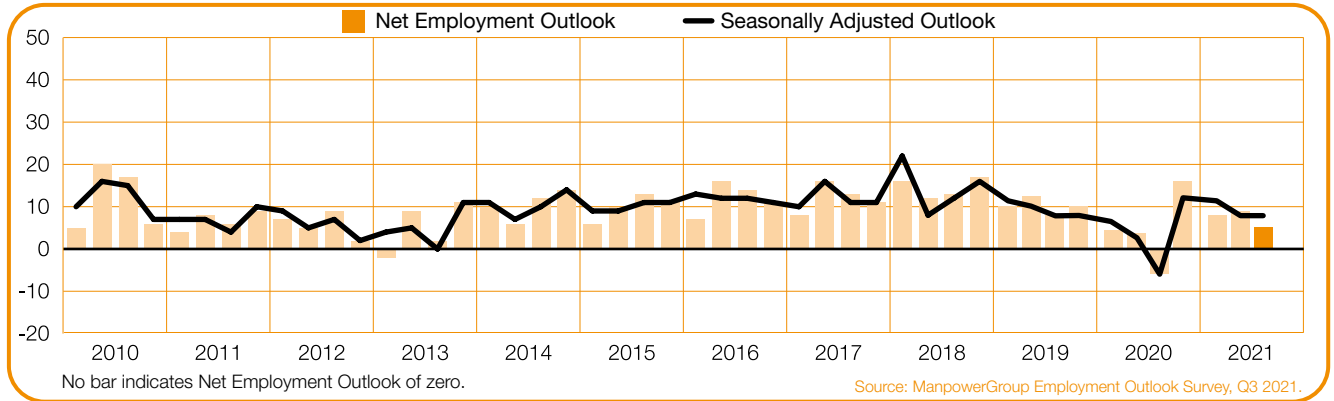
Job seekers can expect to benefit from the strongest hiring pace in three years during the coming quarter, according to employers who report a Net Employment Outlook of +10%. Hiring prospects are 11 percentage points stronger quarter-over-quarter and improve by 41 percentage points when compared with this time one year ago.



+8%

Wholesale & Retail Trade

The fair hiring climate is forecast to continue in the next three months, with employers reporting a Net Employment Outlook of +8% for the second consecutive quarter. When compared with last year at this time, hiring intentions improve by 12 percentage points.



Global Employment Outlook

	Quarter 3 2021	Qtr on Qtr Change Q2 2021 to Q3 2021	Yr on Yr Change Q3 2020 to Q3 2021
	%		
Americas			
Argentina	-1 (1) ¹	-5 (-1) ¹	8 (8) ¹
Brazil	7 (7) ¹	-6 (-2) ¹	21 (21) ¹
Canada	13 (8) ¹	2 (0) ¹	18 (18) ¹
Colombia	6 (5) ¹	0 (-1) ¹	24 (24) ¹
Costa Rica	8 (9) ¹	2 (5) ¹	31 (31) ¹
Guatemala	9 (9) ¹	2 (2) ¹	22 (21) ¹
Mexico	10 (9) ¹	2 (2) ¹	19 (19) ¹
Panama	0 (1) ¹	7 (9) ¹	12 (12) ¹
Peru	2 (2) ¹	2 (3) ¹	21 (20) ¹
United States	29 (25) ¹	10 (7) ¹	23 (22) ¹

Asia Pacific			
Australia	16 (17) ¹	0 (0) ¹	30 (30) ¹
China	16 (13) ¹	11 (7) ¹	13 (10) ¹
Hong Kong	1 (0) ¹	3 (1) ¹	1 (0) ¹
India	5 (7) ¹	-5 (-2) ¹	2 (2) ¹
Japan	11 (10) ¹	4 (5) ¹	2 (1) ¹
Singapore	16 (15) ¹	-1 (-1) ¹	43 (43) ¹
Taiwan	27 (24) ¹	2 (-1) ¹	20 (20) ¹

EMEA**			
Austria	14 (10) ¹	7 (6) ¹	14 (14) ¹
Belgium	14 (13) ¹	5 (4) ¹	19 (19) ¹
Bulgaria	18 (13) ¹	15 (11) ¹	24 (23) ¹
Croatia	14	2	12
Czech Republic	7 (4) ¹	-1 (-3) ¹	11 (11) ¹
Finland	13 (6) ¹	7 (4) ¹	13 (13) ¹
France	12 (9) ¹	4 (2) ¹	20 (20) ¹
Germany	12 (11) ¹	7 (8) ¹	10 (10) ¹
Greece	22 (15) ¹	7 (6) ¹	24 (23) ¹
Hungary	8 (8) ¹	3 (6) ¹	13 (14) ¹
Ireland	18 (15) ¹	15 (15) ¹	27 (27) ¹
Israel	15 (11) ¹	6 (3) ¹	22 (22) ¹
Italy	9 (7) ¹	6 (8) ¹	12 (11) ¹
Netherlands	10 (9) ¹	5 (6) ¹	13 (13) ¹
Norway	15 (11) ¹	9 (5) ¹	19 (19) ¹
Poland	9 (7)¹	2 (1)¹	14 (14)¹
Portugal	8 (5) ¹	9 (6) ¹	17 (17) ¹
Romania	19 (12) ¹	1 (0) ¹	26 (26) ¹
Slovakia	11 (7) ¹	5 (2) ¹	23 (23) ¹
Slovenia	13 (9) ¹	3 (0) ¹	20 (19) ¹
South Africa	0 (1) ¹	4 (6) ¹	19 (19) ¹
Spain	7 (4) ¹	6 (4) ¹	17 (16) ¹
Sweden	17 (11) ¹	6 (3) ¹	23 (23) ¹
Switzerland	10 (8) ¹	5 (5) ¹	17 (17) ¹
Turkey	11 (7) ¹	-5 (-4) ¹	9 (9) ¹
UK	8 (8) ¹	13 (13) ¹	20 (20) 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 45,000 employers in 43 countries and territories on hiring prospects* in the third quarter of 2021. All participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of September 2021 as compared to the current quarter?” Interviewing was carried out during the exceptional circumstances of the COVID-19 outbreak. The survey findings for the third quarter of 2021 reflect the impact of the global health emergency, and the ongoing economic restrictions in many countries.

Employers anticipate payroll gains in 42 of the 43 countries and territories surveyed by ManpowerGroup for the July to September period, while flat hiring activity is expected in one.

In a comparison with the second quarter of 2021, employers report stronger hiring plans in 31 of the 43 countries and territories, while Outlooks weaken in eight, with no change reported in four. When compared with this time one year ago – when COVID-19 first had an impact on hiring sentiment – employers in 42 of the 43 countries and territories report improved hiring prospects, with no change in one. In the coming quarter, the strongest labor markets are forecast in the U.S., Taiwan, Australia, Greece, Ireland and Singapore, while the weakest hiring intentions are reported in Hong Kong, Argentina, Panama and South Africa.

Employers in all 26 Europe, Middle East & Africa (EMEA) region countries expect to add to payrolls during the upcoming quarter. When compared with the prior quarter, Outlooks strengthen in 22 EMEA countries, while weakening in two. In a comparison with the same period last year, hiring plans strengthen in all 26 EMEA countries. The strongest hiring activity is expected in Greece, Ireland, and Croatia, while employers in South Africa, the Czech Republic and Spain forecast the weakest hiring pace.

Workforce gains are anticipated in six of the seven Asia Pacific countries and territories during the July to September period, while flat hiring prospects are reported in the seventh – Hong Kong. In a comparison with the previous quarter, Outlooks improve in three countries and territories, but also weaken in three. Hiring sentiment strengthens in six Asia Pacific countries and territories when compared with this time one year ago, while remaining unchanged in one. The strongest hiring plans for the next three months are reported in Taiwan and Australia, while the weakest labor market is expected in Hong Kong.

In the Americas region, employers in all 10 countries surveyed expect to grow payrolls during the third quarter of 2021. Hiring intentions strengthen in six Americas countries when compared with the previous quarter, but weaken in three. In a comparison with last year at this time, employers report stronger hiring prospects in all 10 countries. The strongest hiring pace is anticipated in the U.S., while cautiously optimistic hiring plans are reported in Costa Rica, Guatemala and Mexico. The weakest labor markets are anticipated in Argentina and 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 14 September 2021 and will detail expected labor market activity for the fourth quarter of 2021.

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

International Comparisons – Americas

ManpowerGroup interviewed more than 17,000 employers in 10 countries across North, Central and South America about hiring prospects for the third quarter of 2021. In all 10 countries, employers expect workforce gains during the upcoming quarter.

The labor market in the U.S. is expected to be the strongest of all 43 countries in the ManpowerGroup Employment Outlook Survey over the next three months. U.S. employers report their strongest hiring intentions in 21 years, with solid workforce growth anticipated in all four regions. Workforce gains are expected in all 12 industry sectors, most notably in the Leisure & Hospitality and Education & Health Services sectors, with their strongest Outlooks since they were first analyzed in 2009, and in the Wholesale & Retail Trade sector, where the Outlook matches the strongest since the survey started in 1982.

Canada's employers expect the fair hiring climate to continue in the third quarter of 2021, reporting no change over the previous quarter. With payrolls expected to grow in all 10 industry sectors, the strongest third quarter hiring activity is forecast for the Public Administration and Durable Goods Manufacturing sectors.

Employers report encouraging signs for job seekers in Mexico during the July to September period, with a slight uptick in hiring prospects when compared with the prior quarter. Employers in all seven Mexican industry sectors expect to grow payrolls, including the Manufacturing sector where the Outlook is the strongest reported in two years.

In Central America, hiring sentiment among Costa Rican employers has recovered following the pandemic, and now stands at a three-year high, driven in part by strengthening labor markets in the Transport & Communication and Manufacturing sectors. Panamanian employers report their first positive hiring intentions since the final quarter of 2019, in part fueled by the strongest Services sector Outlook in three years. Employers in Guatemala report cautiously optimistic hiring plans for the July to September period, with the strongest Outlook in more than three years forecast for the Manufacturing sector.

The strongest labor market in South America is anticipated in Brazil, although hiring plans for the country remain modest. Reflecting the impact of the ongoing COVID-19 pandemic, employers in the Manufacturing, Construction, Services and Wholesale & Retail sectors all report weaker hiring prospects when compared with the prior quarter.

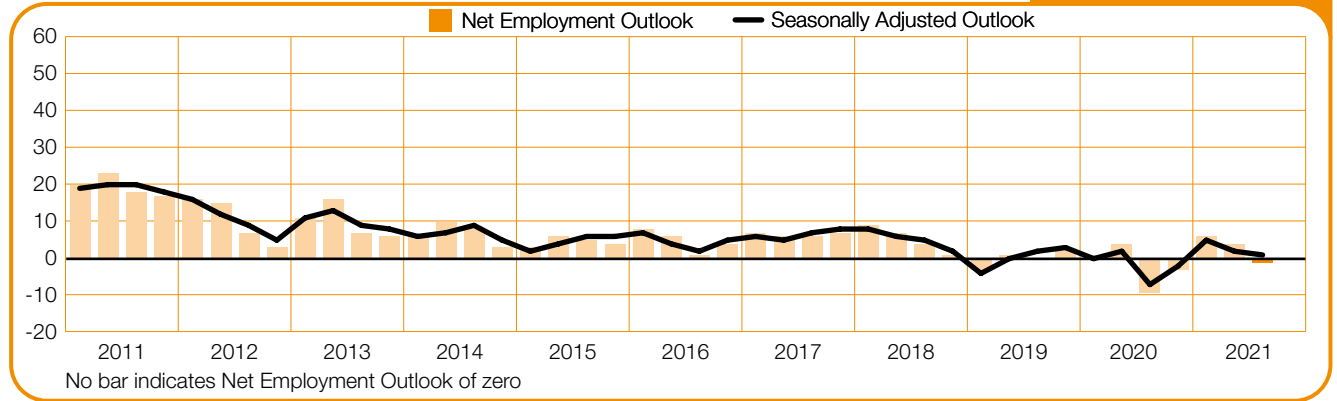
Hiring sentiment in Argentina remains cautious for the third quarter of 2021, with employers anticipating limited job gains. Employers in the Services and Finance, Insurance & Real Estate sectors expect to trim payrolls, but hiring plans are more positive for the Agriculture & Fishing sector, where the Outlook is the strongest in four years.

Colombian employers expect the mild hiring pace to continue in the forthcoming quarter, reporting a relatively stable Outlook. While hiring in the Manufacturing sector continues to be soft, Mining sector employers report their strongest hiring plans in two years and forecasts strengthen for the Agriculture & Fishing and Wholesale & Retail Trade sectors.

In Peru, employers report limited hiring activity for the next three months, with the Construction sector Outlook remaining weak for a second consecutive quarter. However, employers in the Mining sector report considerably improved hiring prospects.

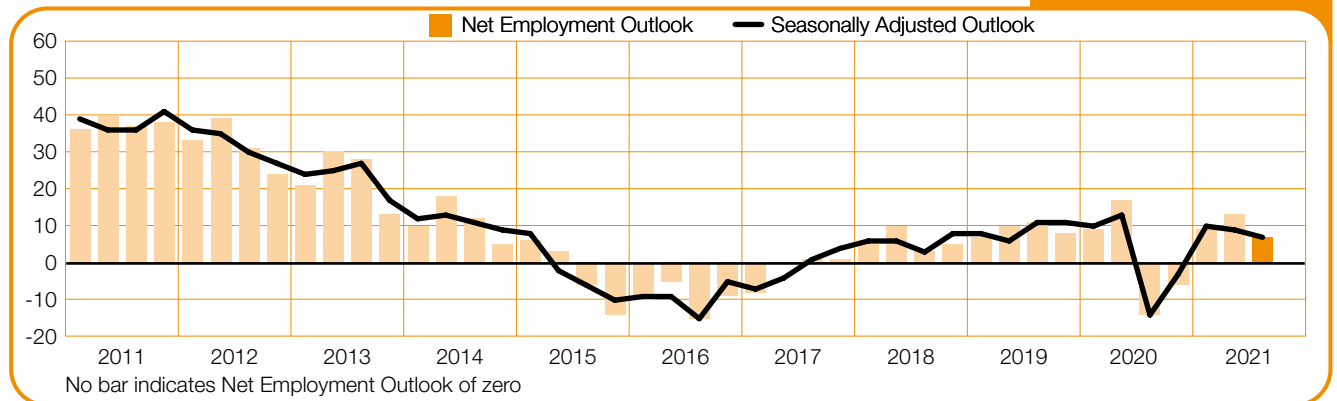
Argentina

-1 (+1)%



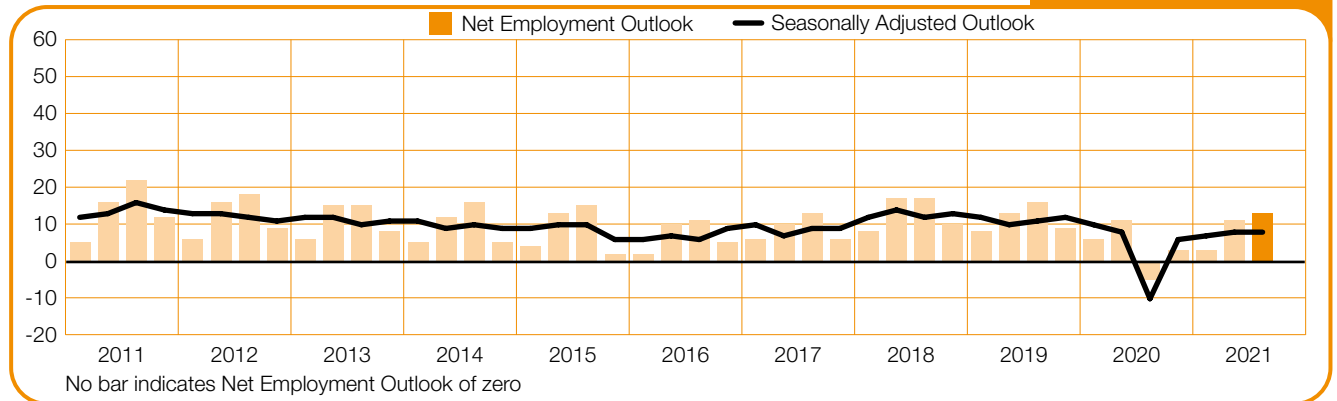
Brazil

+7 (+7)%



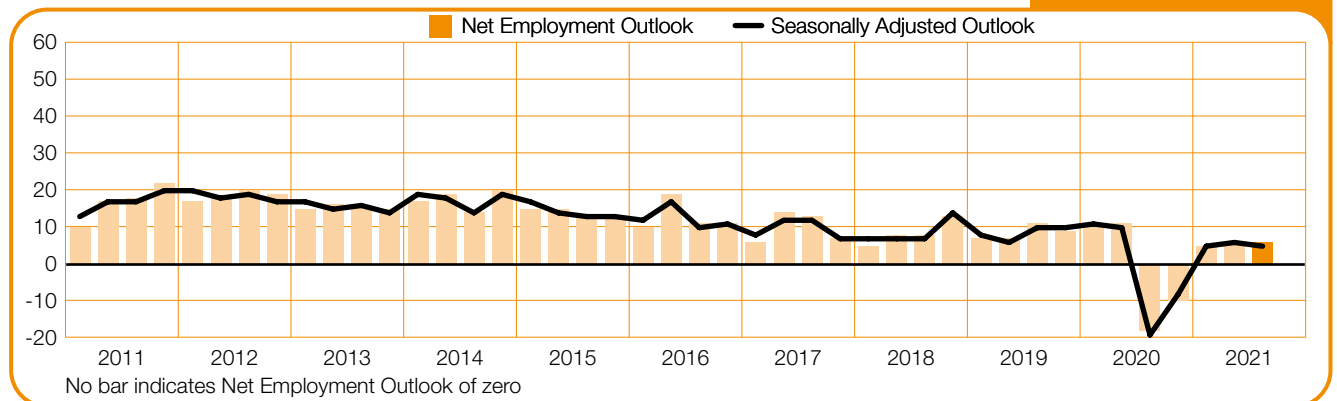
Canada

+13 (+8)%



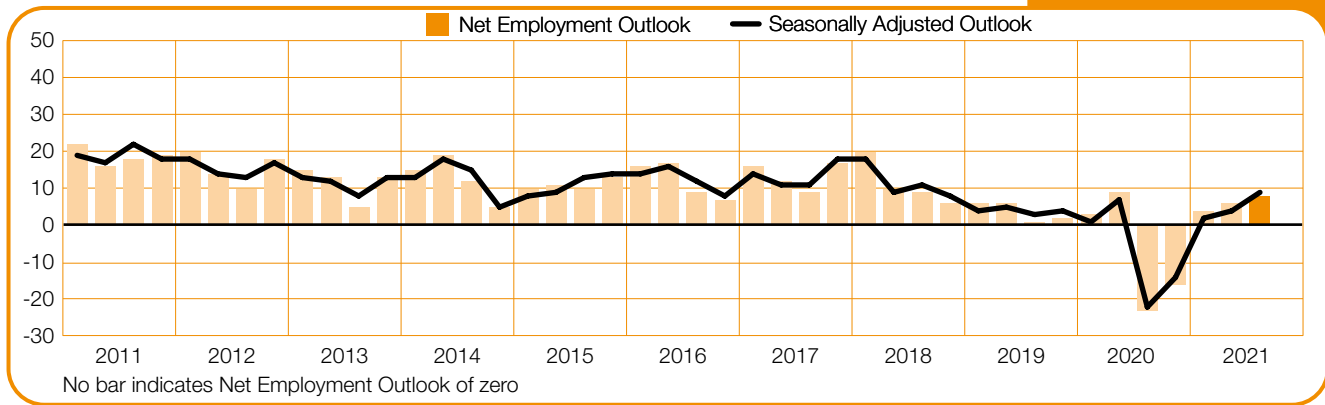
Colombia

+6 (+5)%



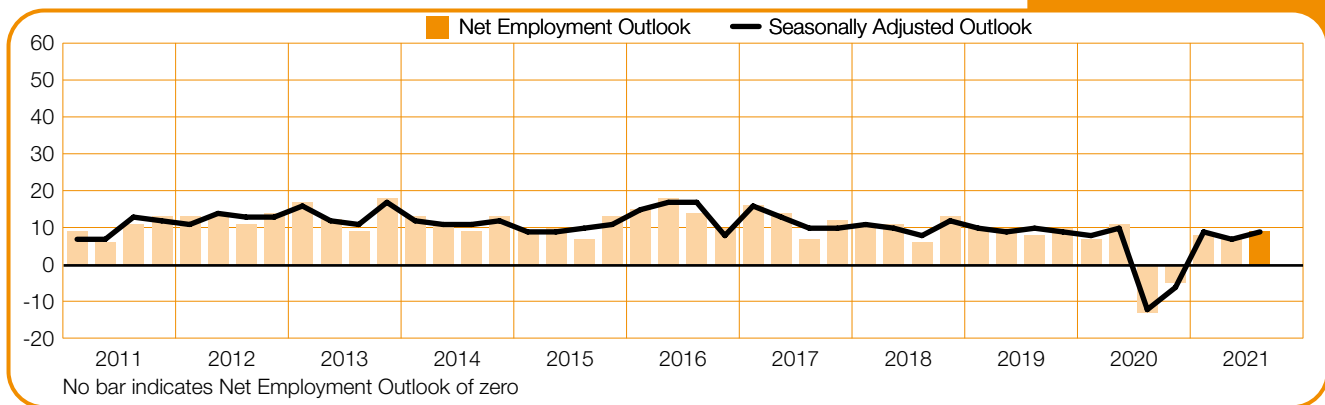
Costa Rica

+8 (+9)%



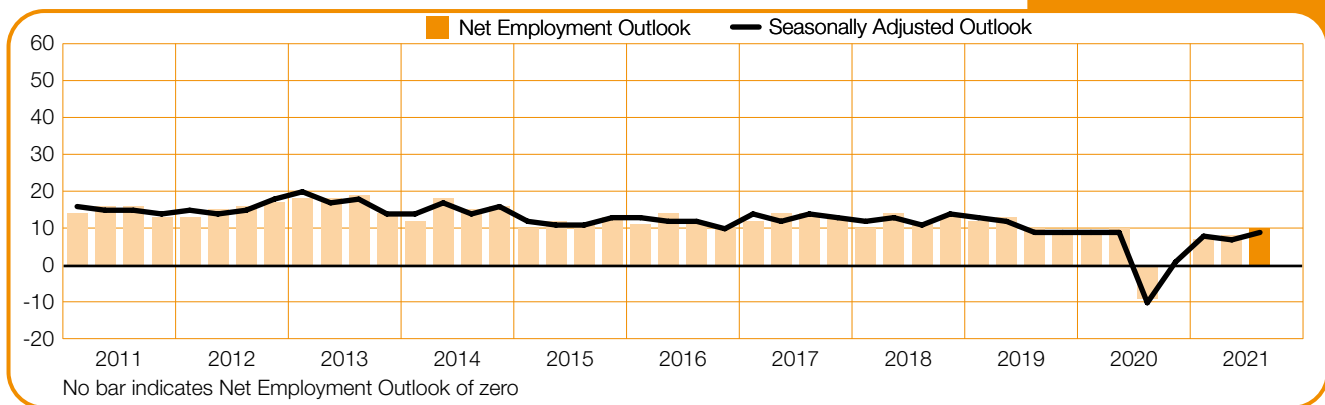
Guatemala

+9 (+9)%



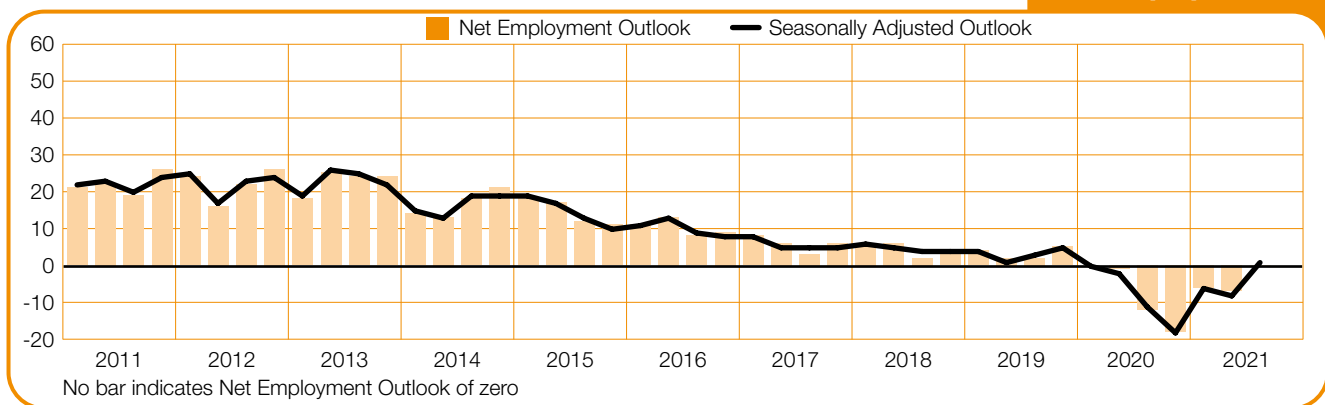
Mexico

+10 (+9)%



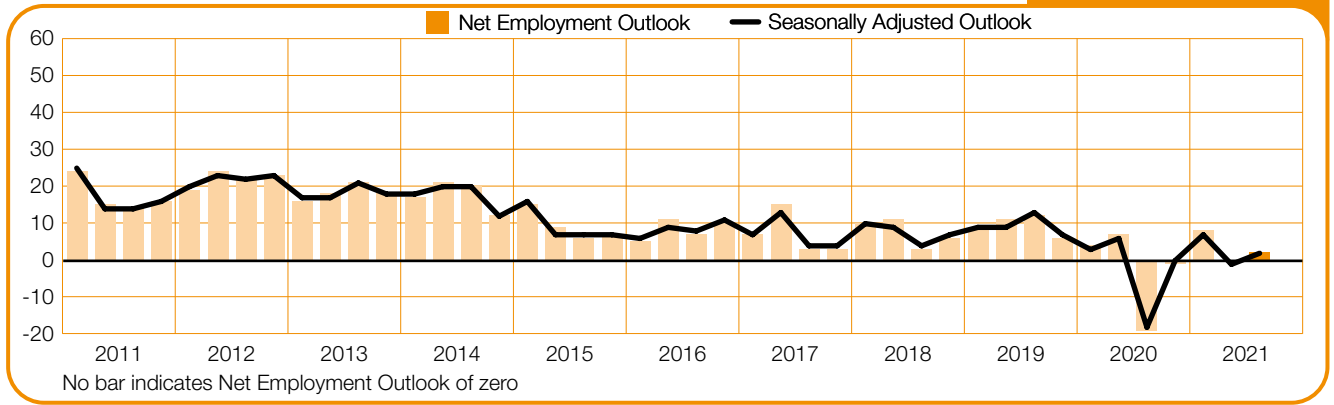
Panama

0 (+1)%



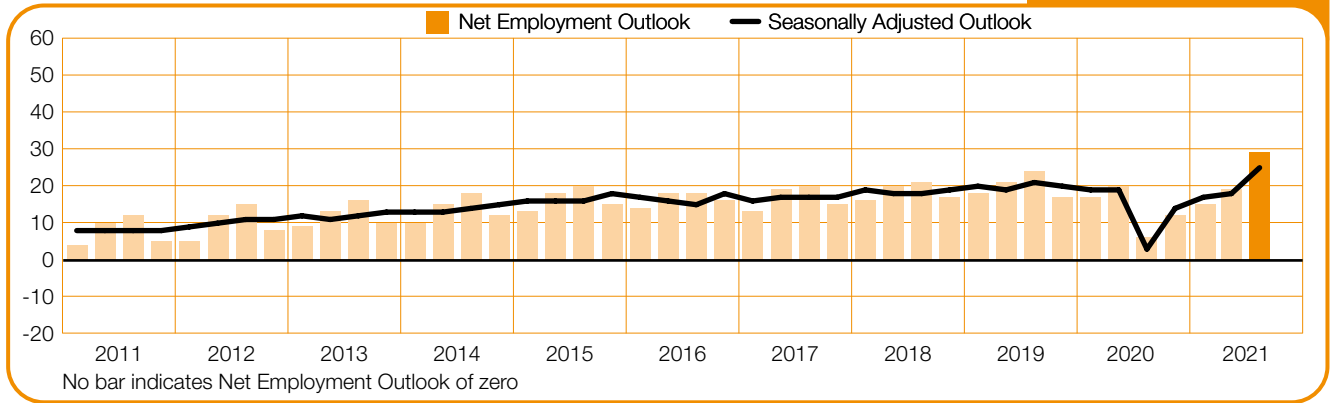
Peru

+2 (+2)%



United States of America

+29 (+25)%



International Comparisons – Asia–Pacific

More than 10,000 employers in the seven Asia Pacific countries and territories took part in the ManpowerGroup survey on hiring prospects for the July to September time frame. Employers in six of the seven countries and territories expect to add to payrolls during the next three months, while a flat labor market is expected in one.

The Chinese labor market is forecast to make a strong recovery from the impact of the pandemic during the coming quarter, with employers reporting the strongest hiring intentions in six years. Workforce gains are expected in all six Chinese industry sectors, with the strongest hiring sentiment reported in the Finance, Insurance & Real Estate, Services, Manufacturing and the Wholesale & Retail Trade sectors – Outlooks for these four sectors are also the strongest reported in at least six years.

For the fourth consecutive quarter, the strongest hiring climate in the Asia Pacific region is expected in Taiwan, fueled in part by bright hiring plans for the Mining & Construction sector and a brisk hiring pace in the Manufacturing sector, where the Outlook for the coming quarter is the strongest in six years.

However, Hong Kong employers expect the subdued labor market to continue during the next three months, forecasting flat hiring activity overall, although limited payroll growth is expected in the Finance, Insurance & Real Estate and Services sectors.

In India, employers expect a modest increase in payrolls during the upcoming quarter, although hiring sentiment is slightly weaker when compared with the prior quarter, reflecting the ongoing impact of COVID-19 in the country. While the Manufacturing sector labor market continues to be relatively stable, the Services sector is slightly weaker when compared to the prior quarter and the Outlook in the Finance, Insurance & Real Estate sector is the weakest since the survey began in 2005.

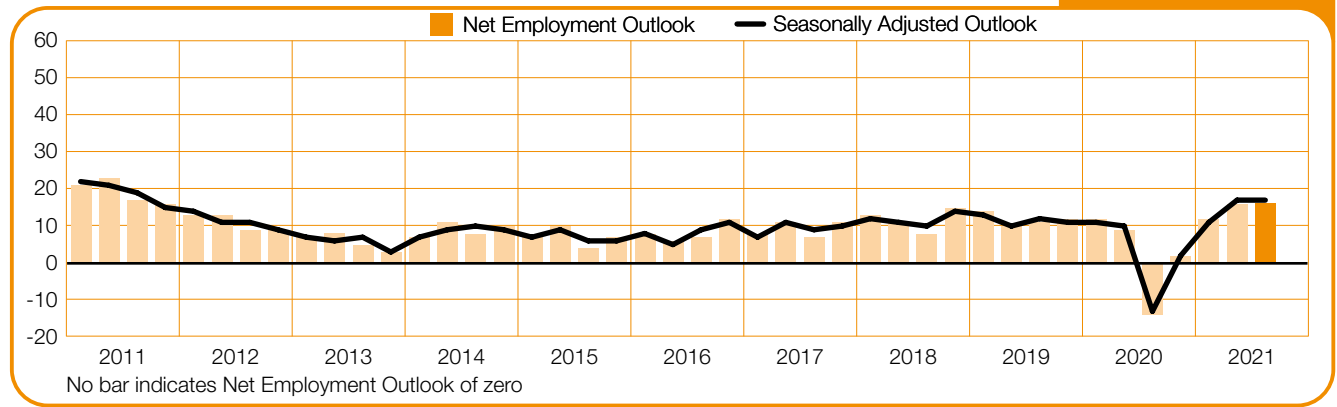
The upbeat hiring pace in Australia is expected to continue during the July to September period. The strongest hiring prospects in 10 years are reported by employers in the Finance, Insurance & Real Estate sector while the Services sector forecast improves sharply year-over-year. Elsewhere, the Mining & Construction sector is the strongest in more than two years following four consecutive quarters of improvement.

Steady payroll growth is anticipated in Singapore for a third consecutive quarter, driven in part by an active labor market in the Finance, Insurance & Real Estate sector where employers report the strongest Outlook in more than six years and a steep increase year-over-year in the Services sector, while the Manufacturing sector forecast is the strongest in nine years.

Job seekers in Japan can expect a fair hiring pace in the next three months, according to employers who report a moderate increase in hiring prospects when compared with the previous quarter. Hiring sentiment strengthens in all seven Japanese industry sectors when compared with three months ago, most notably in the Manufacturing, Wholesale & Retail Trade and Services sectors.

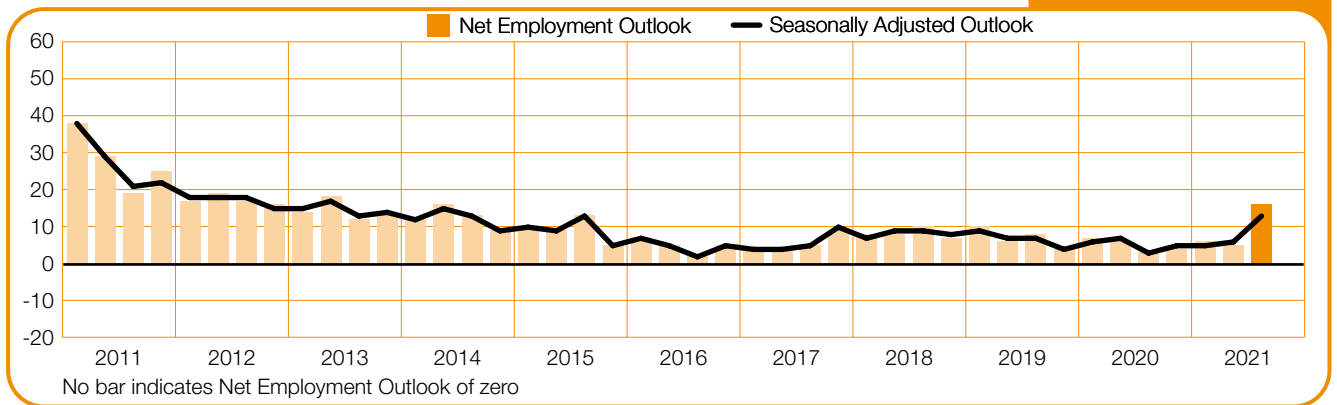
Australia

+16 (+17)%



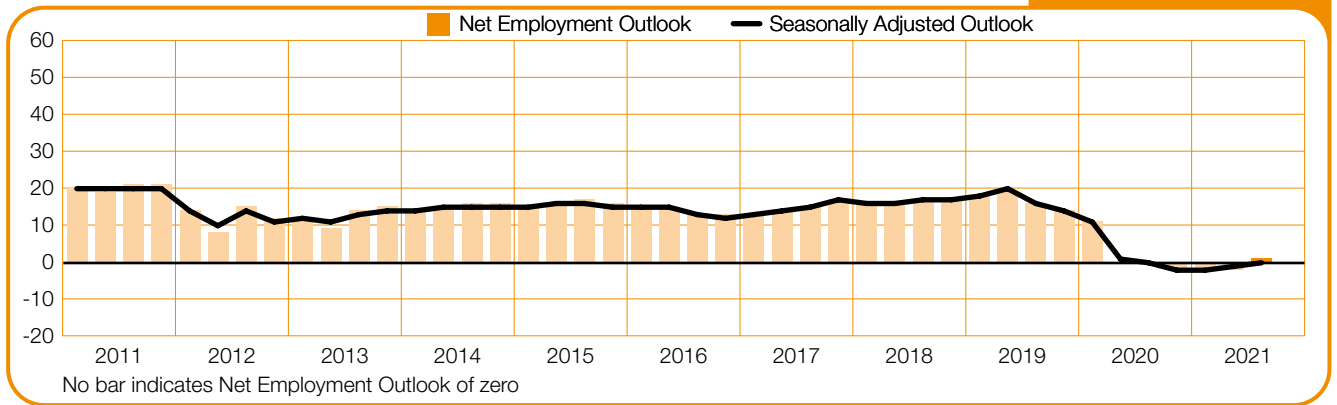
China

+16 (+13)%



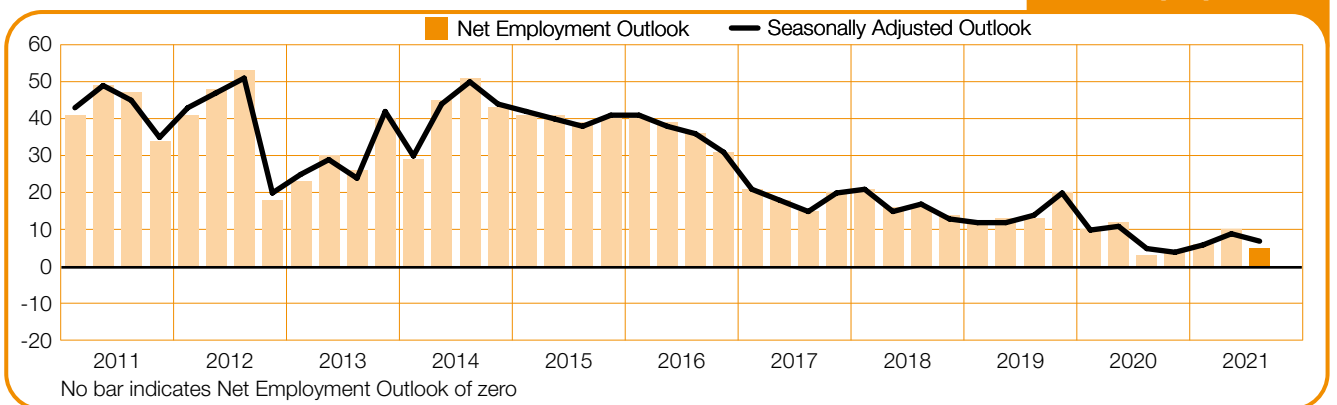
Hong Kong

+1 (0)%



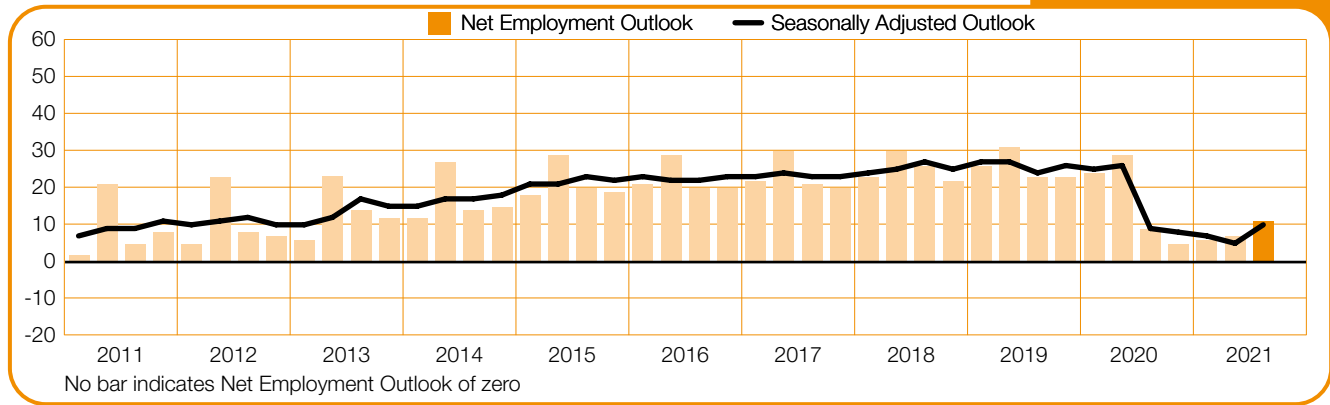
India

+5 (+7)%



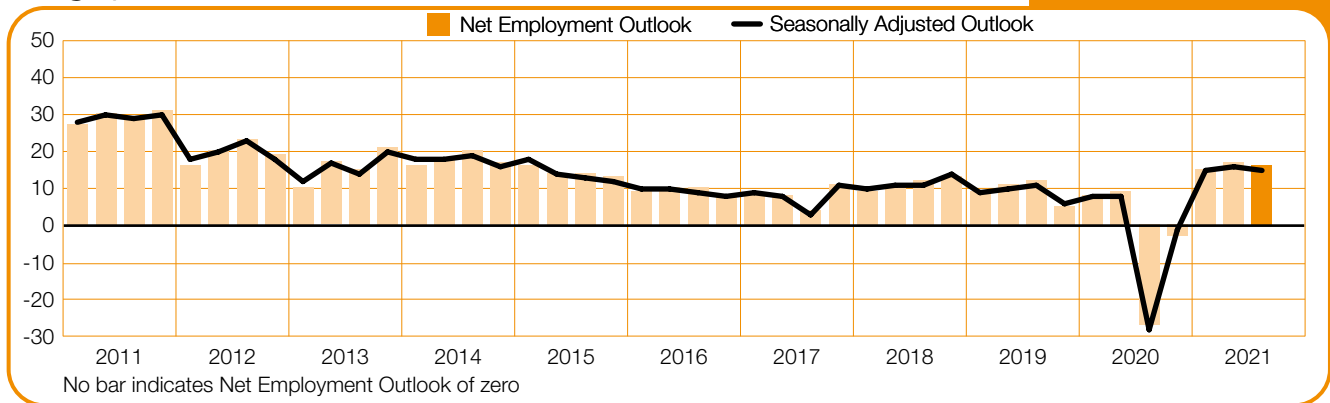
Japan

+11 (+10)%



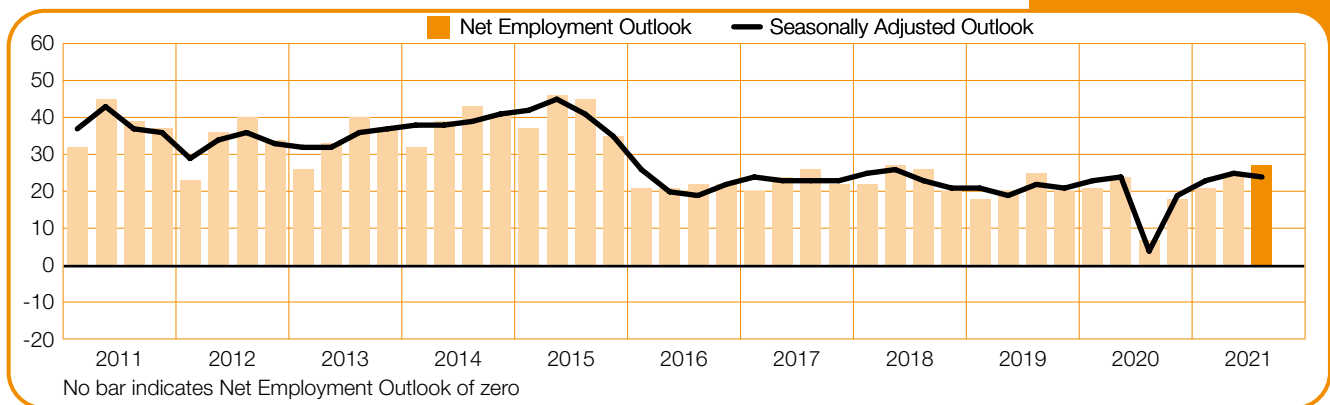
Singapore

+16 (+15)%



Taiwan

+27 (+24)%



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

Employers in more than 17,700 businesses were surveyed in the Europe, Middle East and Africa (EMEA) region on hiring intentions for the third quarter of 2021, as part of the ManpowerGroup Employment Outlook Survey. Employers in all 26 EMEA countries surveyed anticipate payroll gains during the next three months.

An increase in payrolls is anticipated for all three of the largest Eurozone economies during the July to September period, with hiring sentiment strengthening both quarter-over-quarter and year-over-year. German employers expect a return to pre-COVID-19 levels of hiring in the upcoming quarter, driven in part by favorable hiring plans in the Finance & Business Services while employers in the Manufacturing sector report their strongest hiring intentions in two years.

French employers report encouraging signs for job seekers in the coming quarter, anticipating an increase in payrolls across all industry sectors and regions. A steady hiring pace is forecast by Finance & Business Services and Wholesale & Retail Trade sector employers while in the Restaurant & Hotels sector employers are cautiously optimistic for the quarter ahead. Hiring sentiment in Italy returns to the level seen before the pandemic, fueled in part by the strongest Construction sector hiring prospects since the survey began in 2003 and an upbeat hiring pace in the Wholesale & Retail sector. However, Restaurants & Hotels sector employers continue to trim payrolls, for the fifth consecutive quarter.

In the UK, employers report their strongest hiring plans since 2015, with payrolls expected to grow in eight of nine sectors and 11 of 12 regions during the upcoming quarter. Encouraging signs are reported by employers in the Finance & Business Services and Hotels & Retail sectors, while the Outlook for the Community & Social sector is the strongest in five years.

The Outlook for Spain continues to improve quarter-over-quarter as it recovers from the impact of the pandemic. The improvement is driven in part by favorable hiring plans for the Other Services sector and cautious optimism in the Finance & Business Services sector, although the slump in the Restaurants & Hotels sector is expected to continue.

Hiring sentiment in Belgium returns to pre-pandemic levels for the coming quarter with considerable year-over-year improvements in all seven industry sectors and steady hiring plans in the Finance & Business Services and Other Services sectors. Employers in the Manufacturing and Other Production sectors anticipate their strongest hiring climate since 2009. In the Netherlands, employers report a cautiously optimistic Outlook as the recovery from the pandemic continues, with job gains expected in all seven industry sectors, most notably for the Finance & Business Services and Other Services sectors.

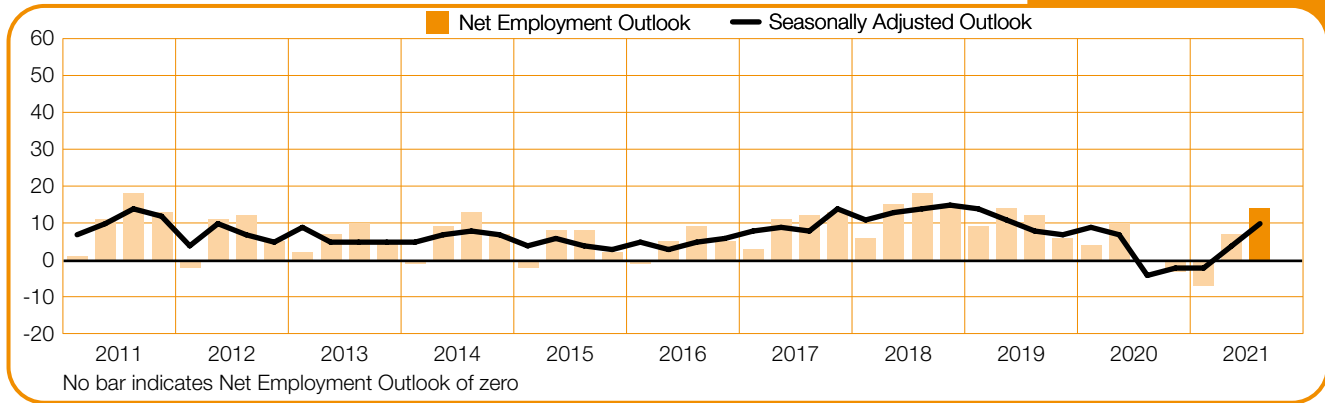
In Norway, employers anticipate respectable workforce gains during the July to September period, with hiring prospects for the Finance & Business Services sector at their strongest in more than eight years and an upbeat forecast in the Other Production sector. However, hiring sentiment in the Restaurants & Hotels sector remains gloomy. The Outlook for Sweden is the strongest reported in two years, reflecting a healthy hiring pace in the Finance & Business Services sector and positive hiring plans for the Wholesale & Retail Trade sector.

The Polish labor market is expected to hold steady in the third quarter of 2021, with payroll gains anticipated in six of seven industry sectors. Hiring activity will likely be strongest in the Construction and Manufacturing sectors, while Restaurants & Hotels sector employers expect the strongest hiring pace in three years.

The strongest hiring prospects across the EMEA region as a whole are reported in Greece and Ireland. Greek employers anticipate an upbeat hiring climate in the next three months, based on solid hiring plans for the Construction, Finance & Business Services and Manufacturing sectors. In Ireland, hiring prospects are the strongest reported since 2007, buoyed in part by a brisk hiring pace in the Construction and Pharmaceuticals sectors.

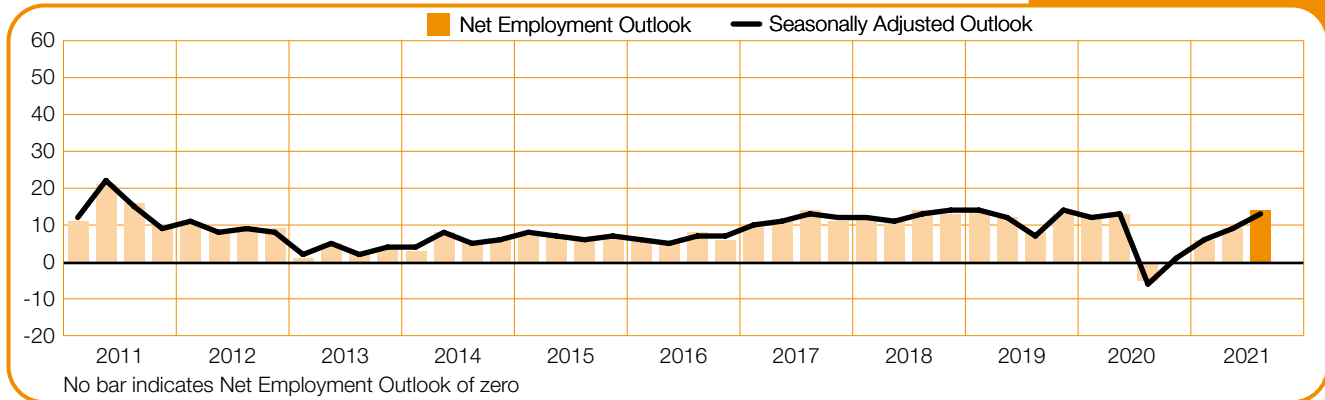
Austria

+14 (+10)%



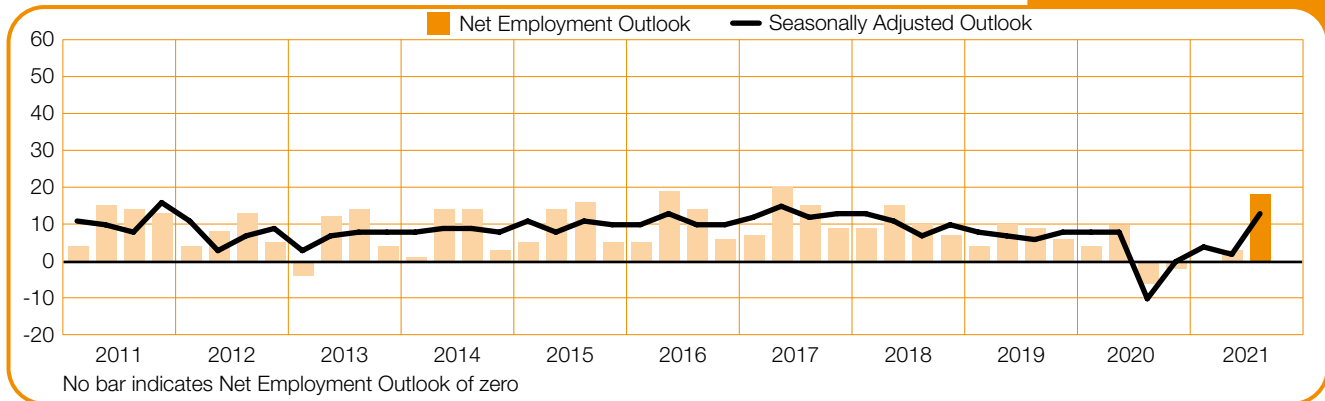
Belgium

+14 (+13)%



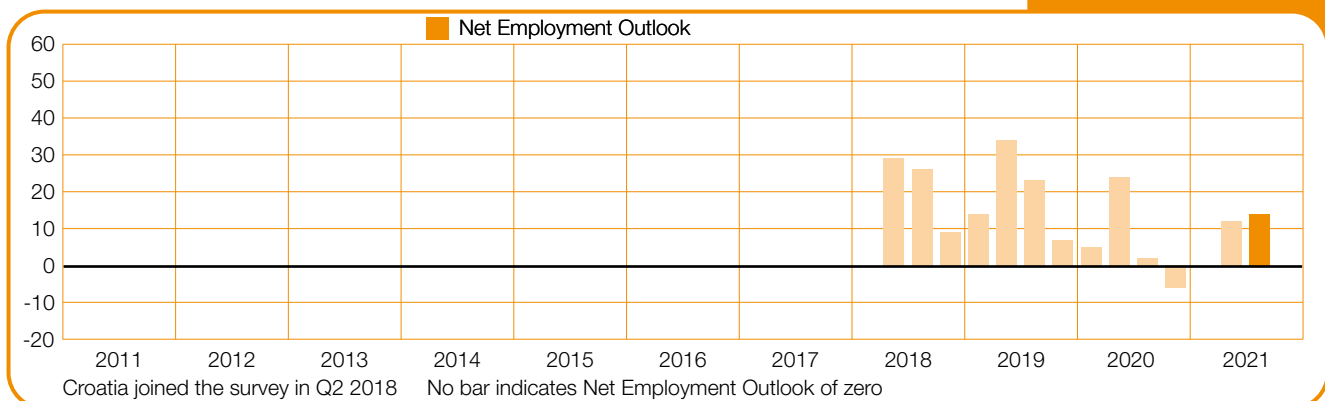
Bulgaria

+18 (+13)%



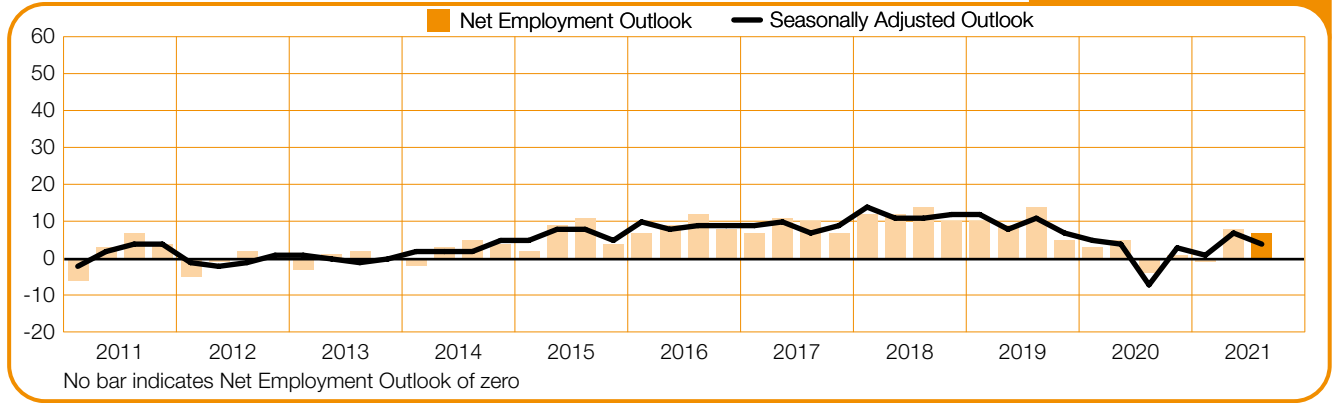
Croatia

+14%



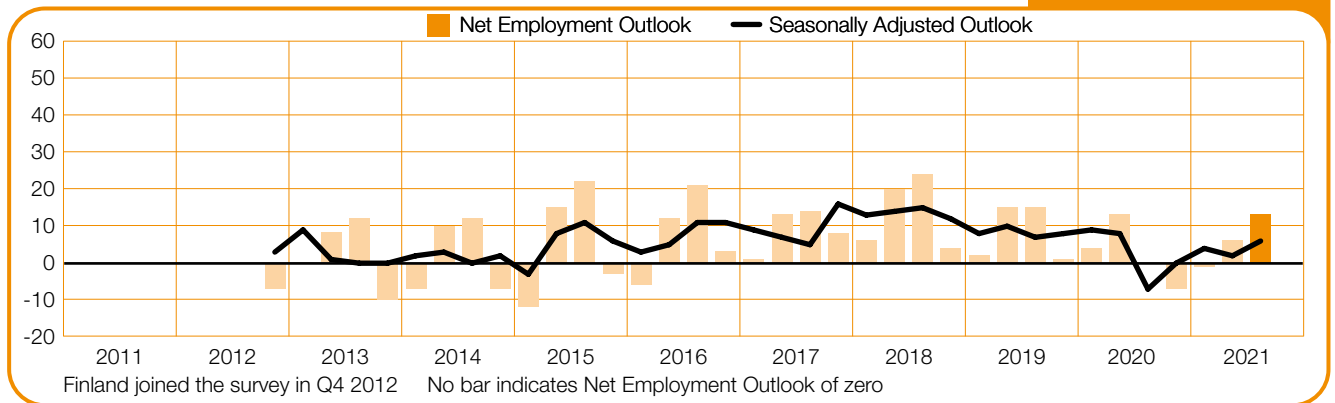
Czech Republic

+7 (+4)%



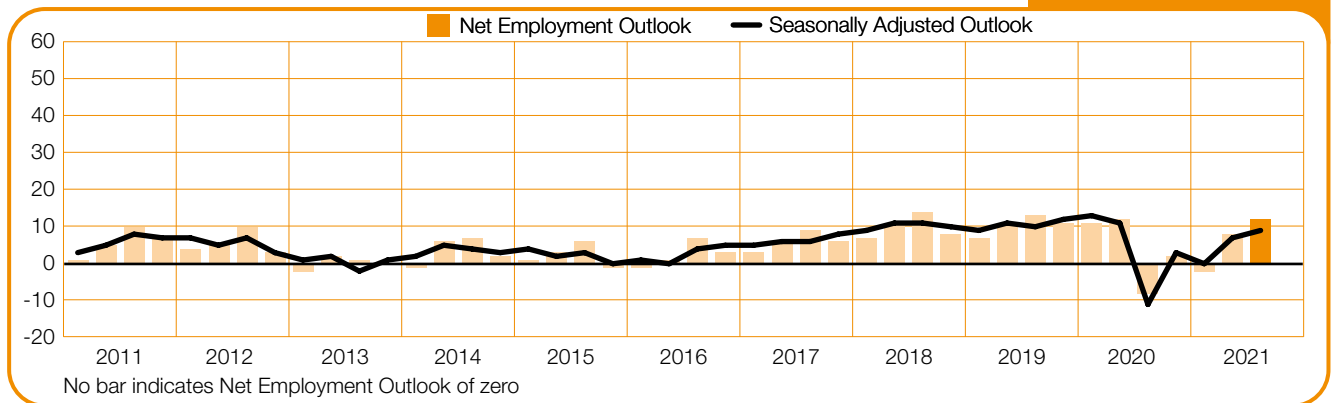
Finland

+13 (+6)%



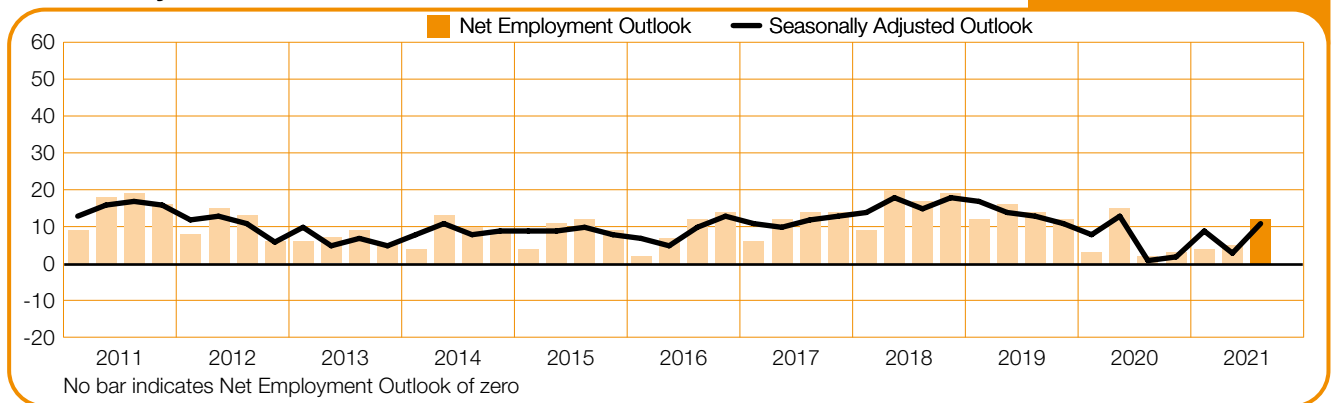
France

+12 (+9)%



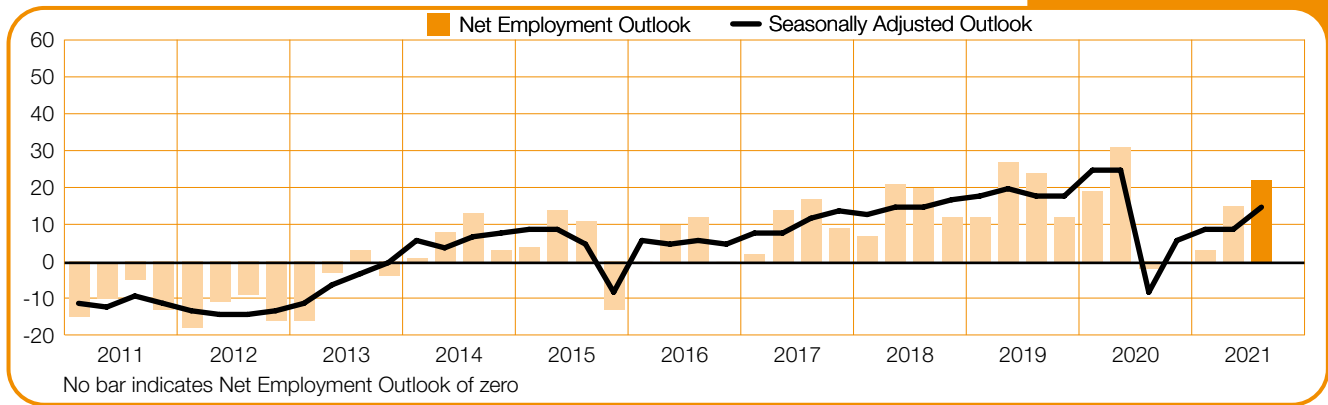
Germany

+12 (+11)%



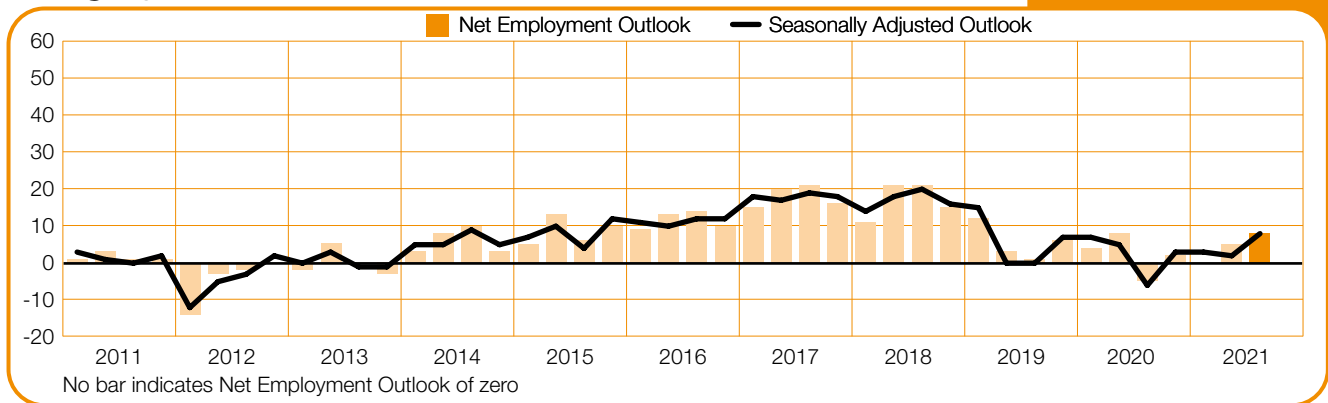
Greece

+22 (+15)%



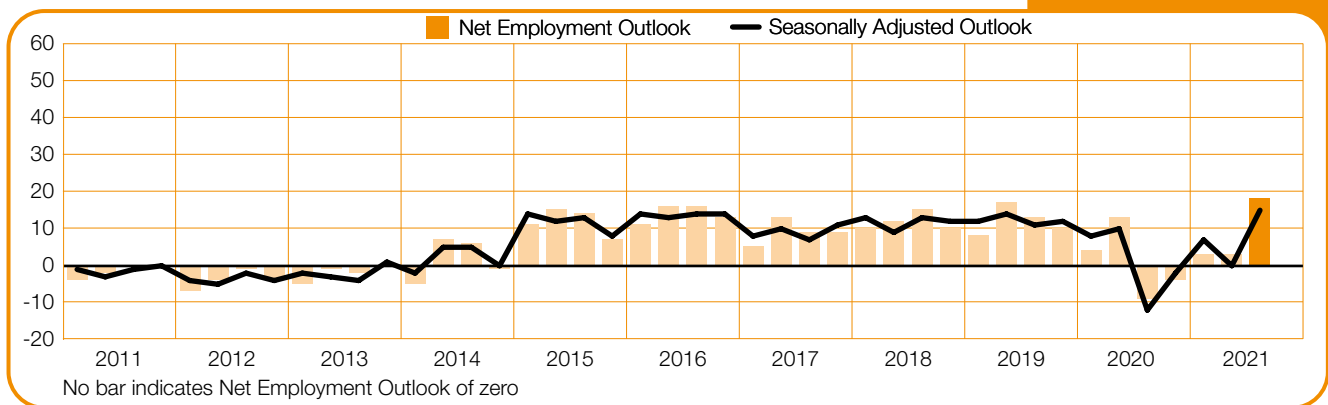
Hungary

+8 (+8)%



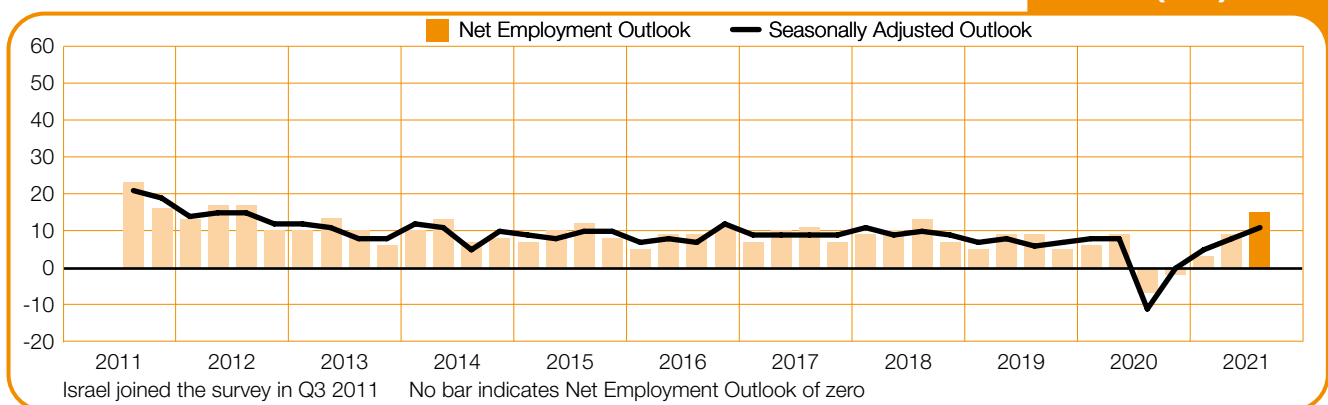
Ireland

+18 (+15)%



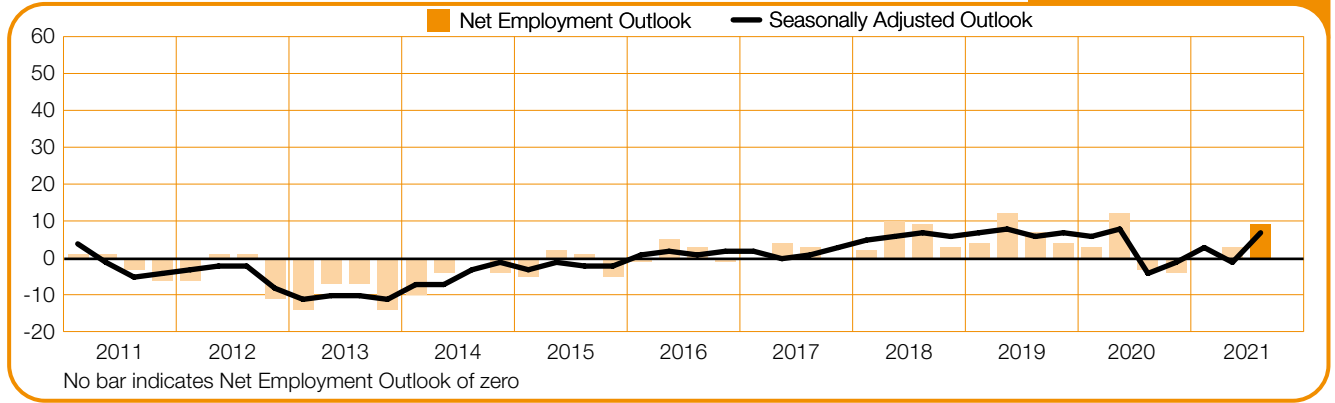
Israel

+15 (+11)%



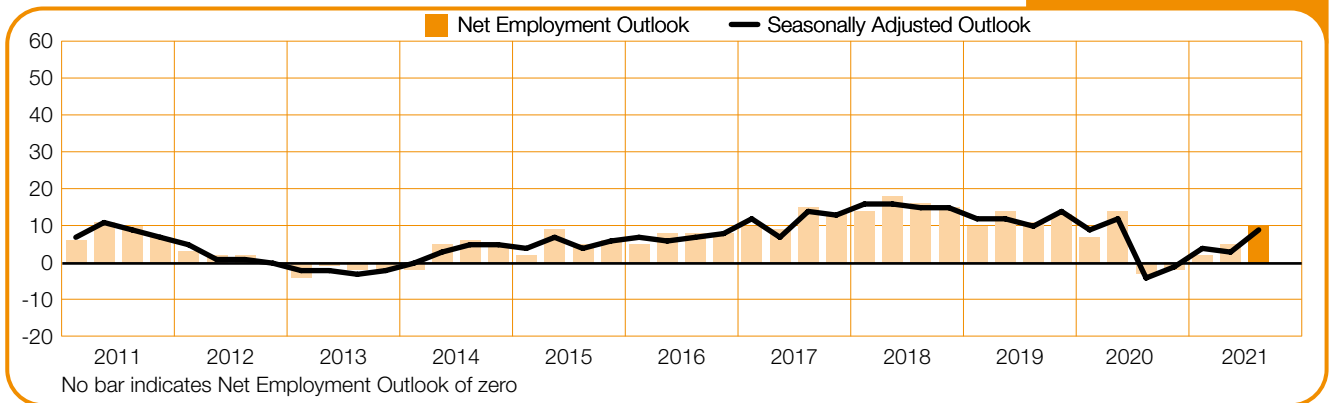
Italy

+9 (+7)%



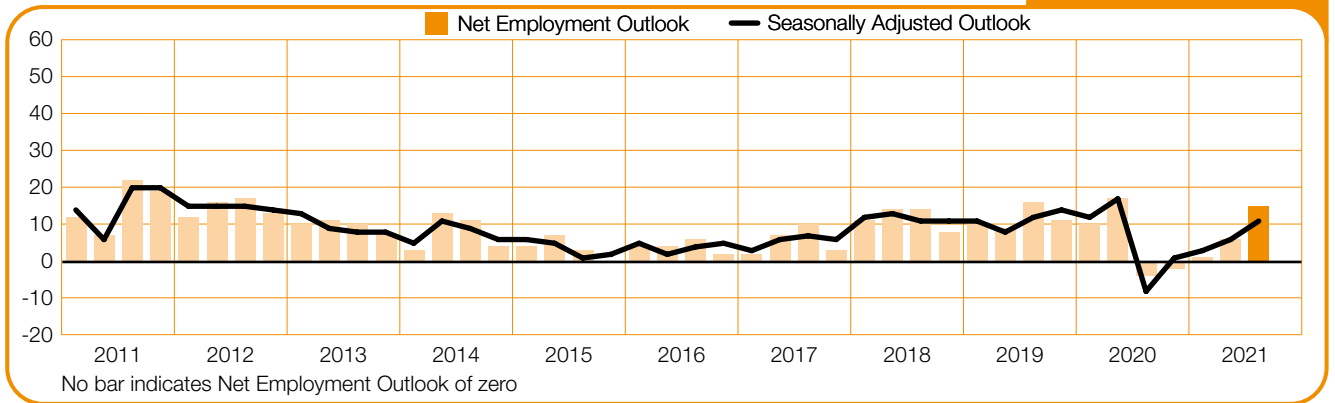
Netherlands

+10 (+9)%



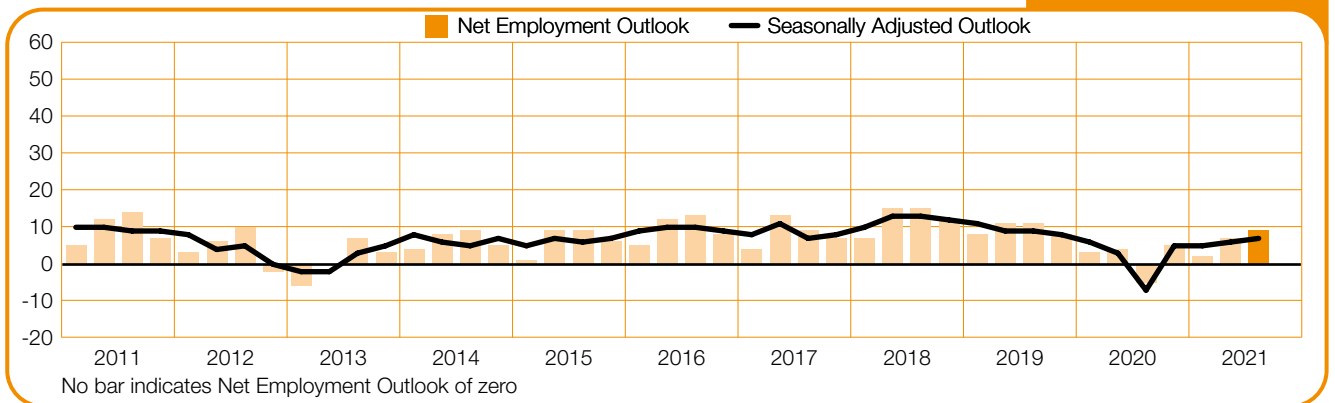
Norway

+15 (+11)%



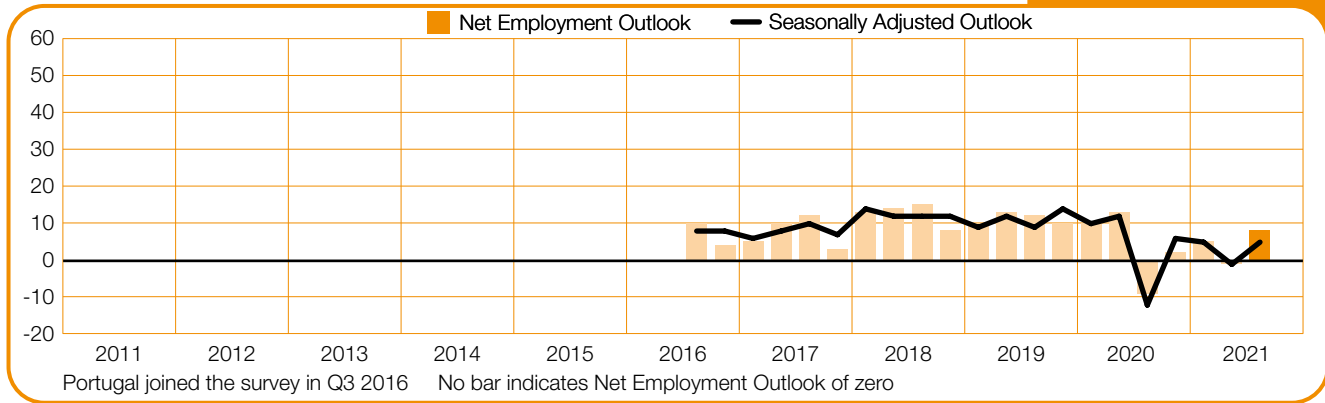
Poland

+9 (+7)%



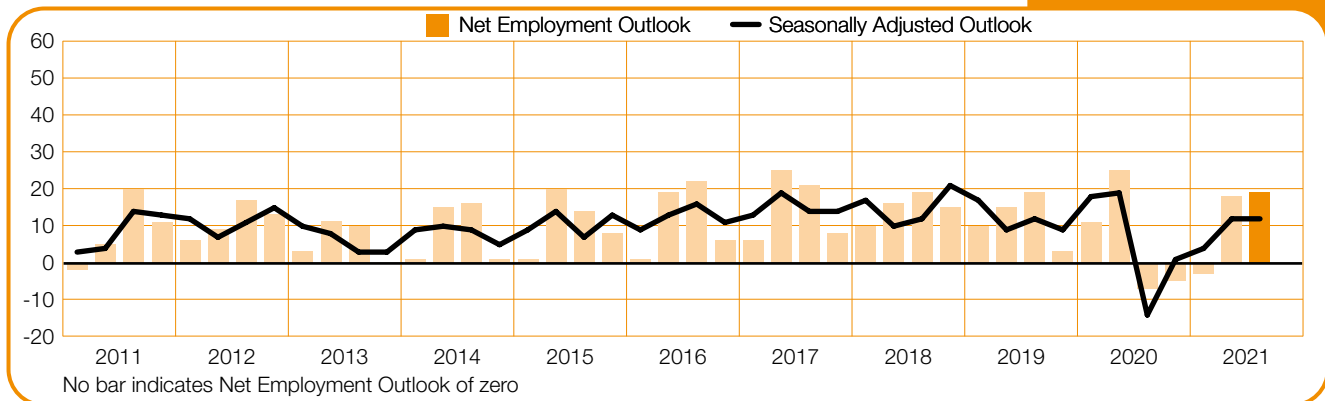
Portugal

+8 (+5)%



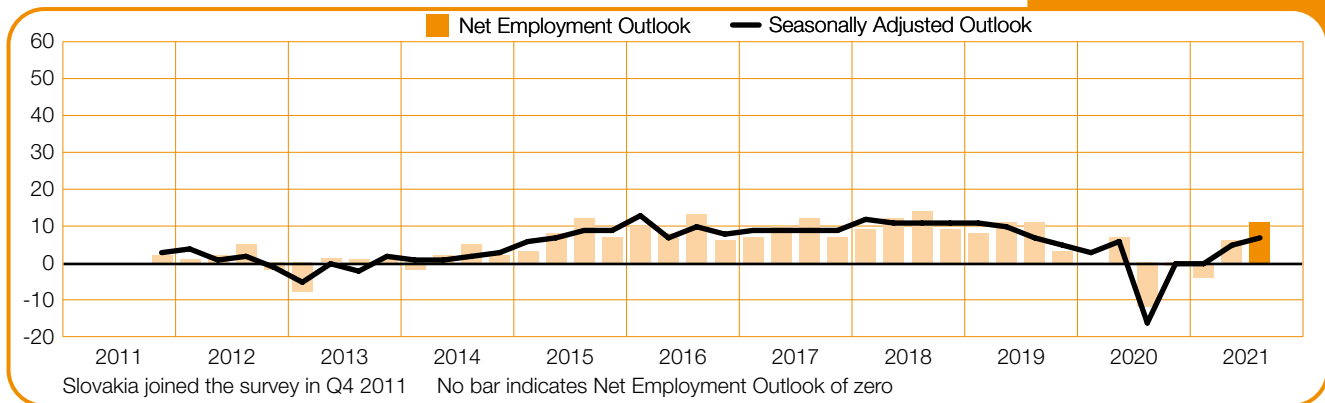
Romania

+19 (+12)%



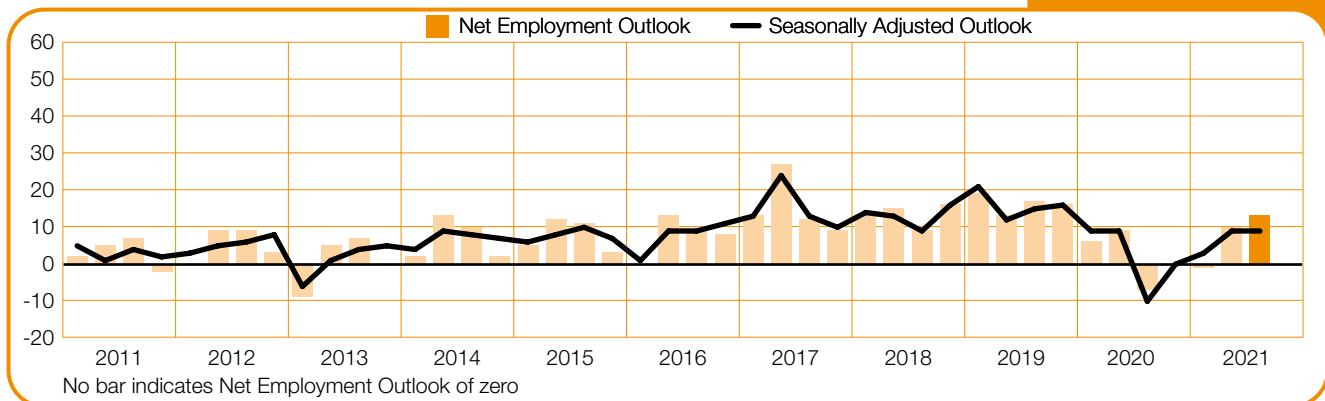
Slovakia

+11 (+7)%



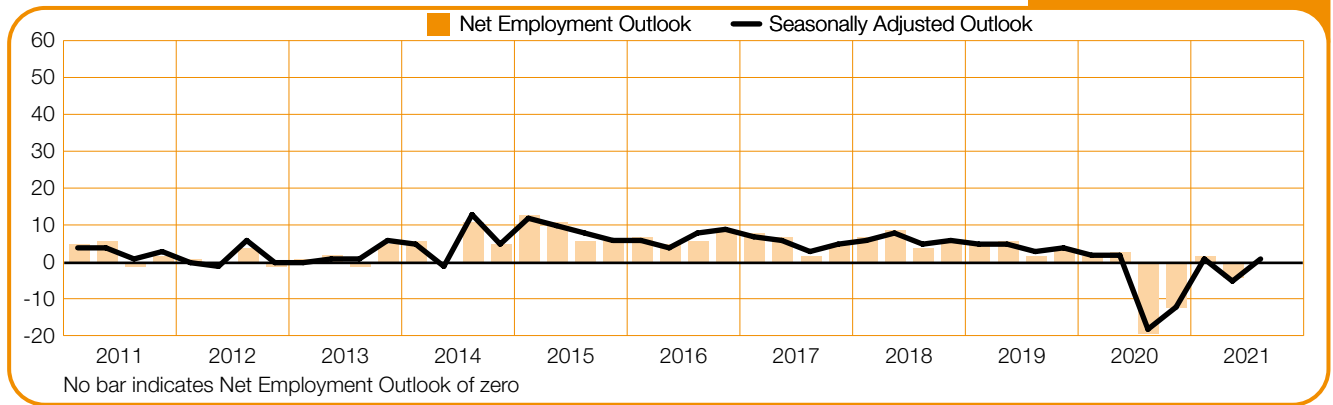
Slovenia

+13 (+9)%



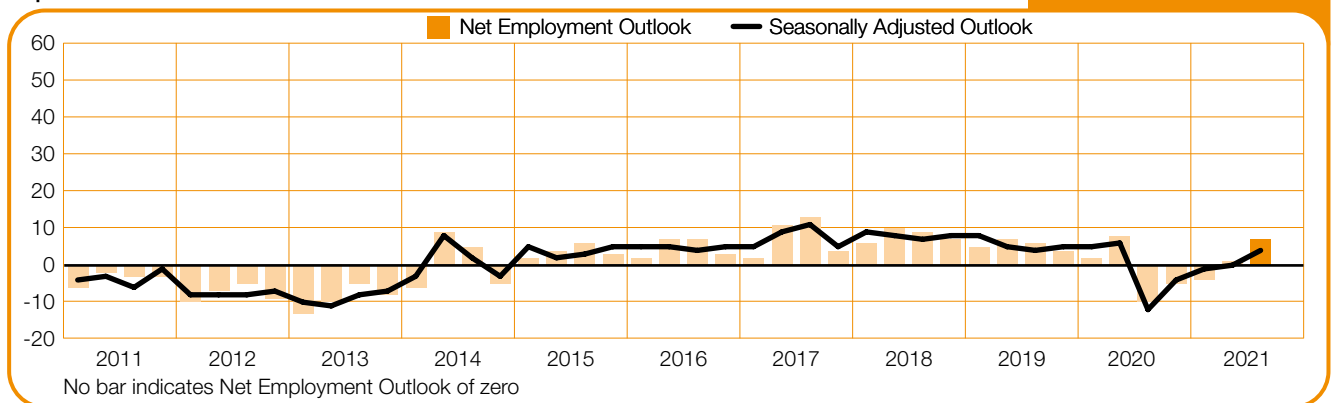
South Africa

0 (+1)%



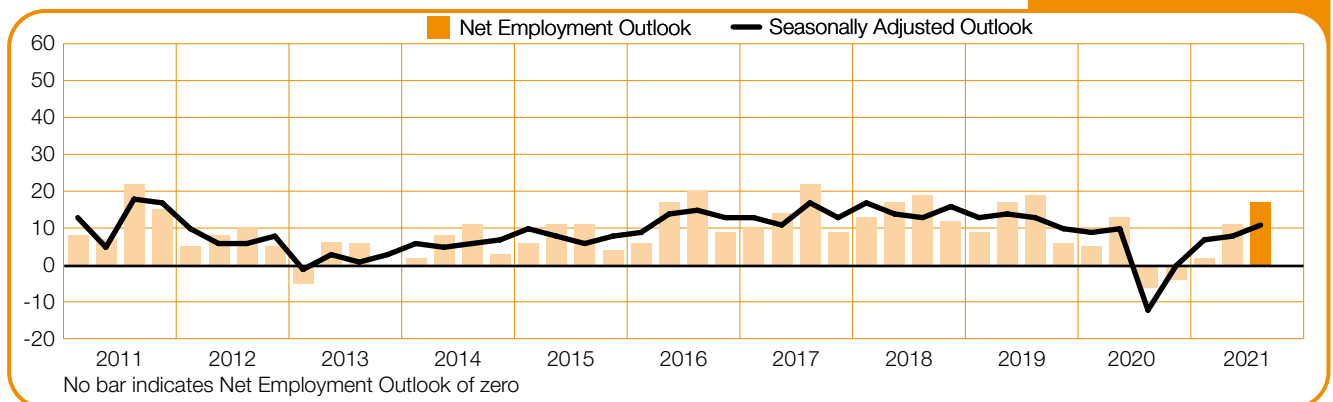
Spain

+7 (+4)%



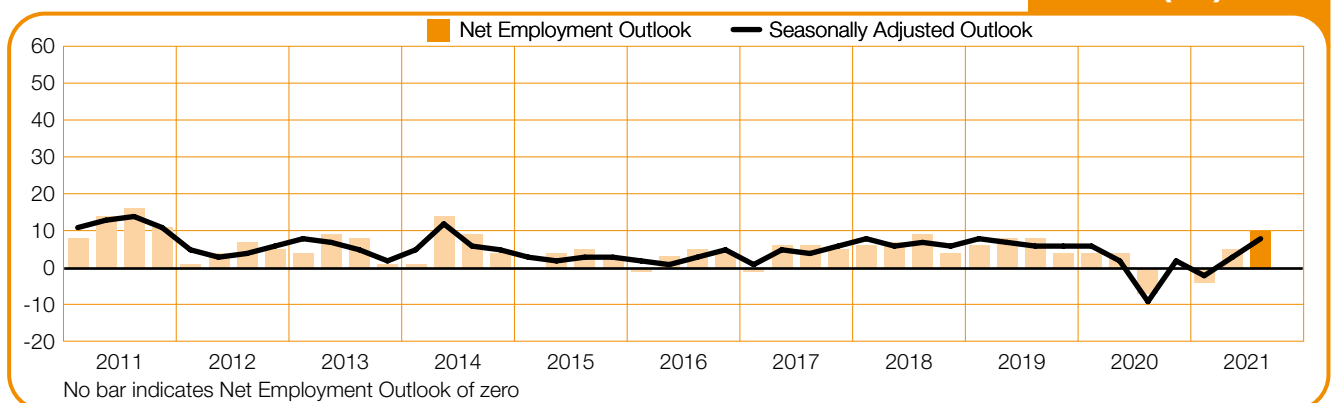
Sweden

+17 (+11)%



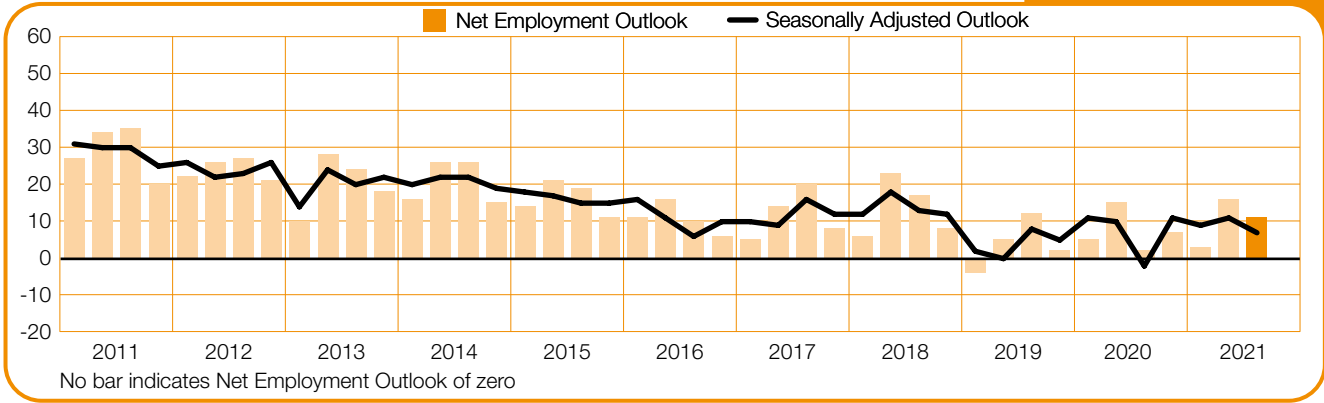
Switzerland

+10 (+8)%



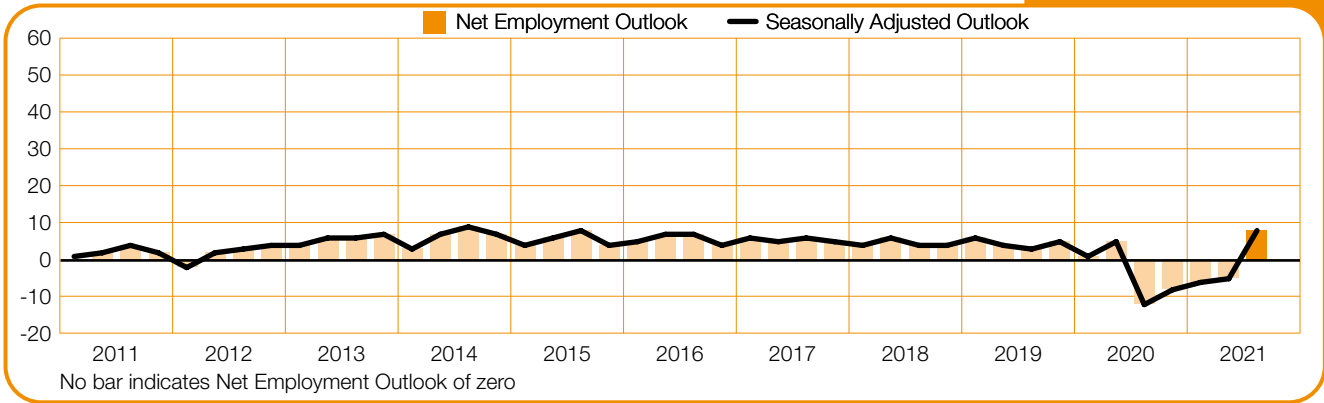
Turkey

+11 (+7)%



United Kingdom

+8 (+8)%



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: For 3Q 2021, sample sizes are smaller than other quarters, reflecting the impact of the global health emergency so total number of interviews is lower than normal in some countries. The survey is based on interviews with over 45,000 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 3Q 2021 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 September 2021 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 +/- 5%.

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. ManpowerGroup intends to add seasonal adjustments to the data for Croatia 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 more than 75 countries and territories and has done so for over 70 years. We are recognized consistently for our diversity - as a best place to work for Women, Inclusion, Equality and Disability and in 2021 ManpowerGroup was named one of the World's Most Ethical Companies for the 12th year - all confirming our position as the brand of choice for in-demand talent.

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 Talent 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.

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