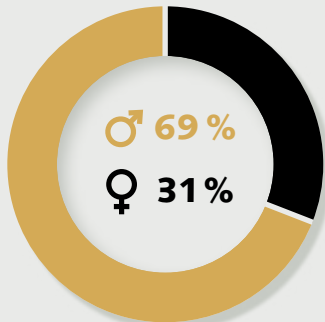


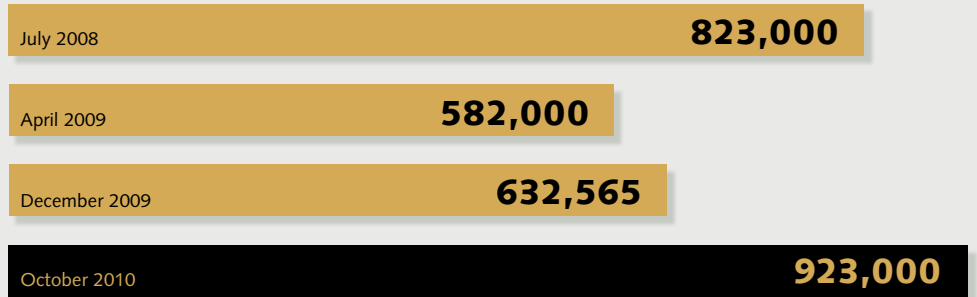
# AGENCY WORK – A BOOMING INDUSTRY

## NUMBER OF TEMPORARY AGENCY WORKERS IN GERMANY

Absolute figures and distribution acc. to gender



Source: BA, Ende 2009



Source: BA/IAB/Zeitarbeitsindex IW

In 2010 the average size of the resident working population in Germany was some **40.37 Millions**.

Source: Federal Office of Statistics

The average gross wage in western Germany is

# 1,750 Euro

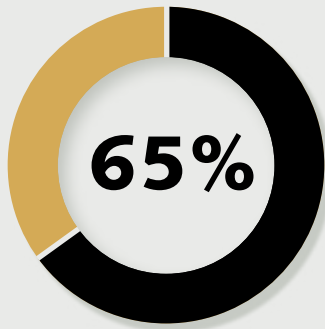
# 1,300 Euro

is the average wage paid to two thirds of temporary agency workers in western Germany

Source: IWH study 2009



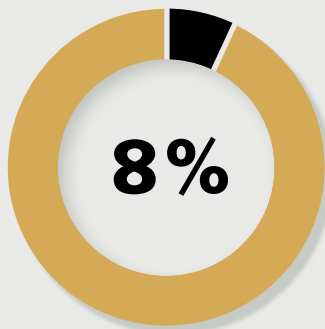
Photo: Timo Volz



#### QUALIFICATIONS

of temporary workers have a vocational qualification. 30 per cent are working as unskilled labourers.

Sources: figures BA 2009 and Federal Office of Statistics 2008



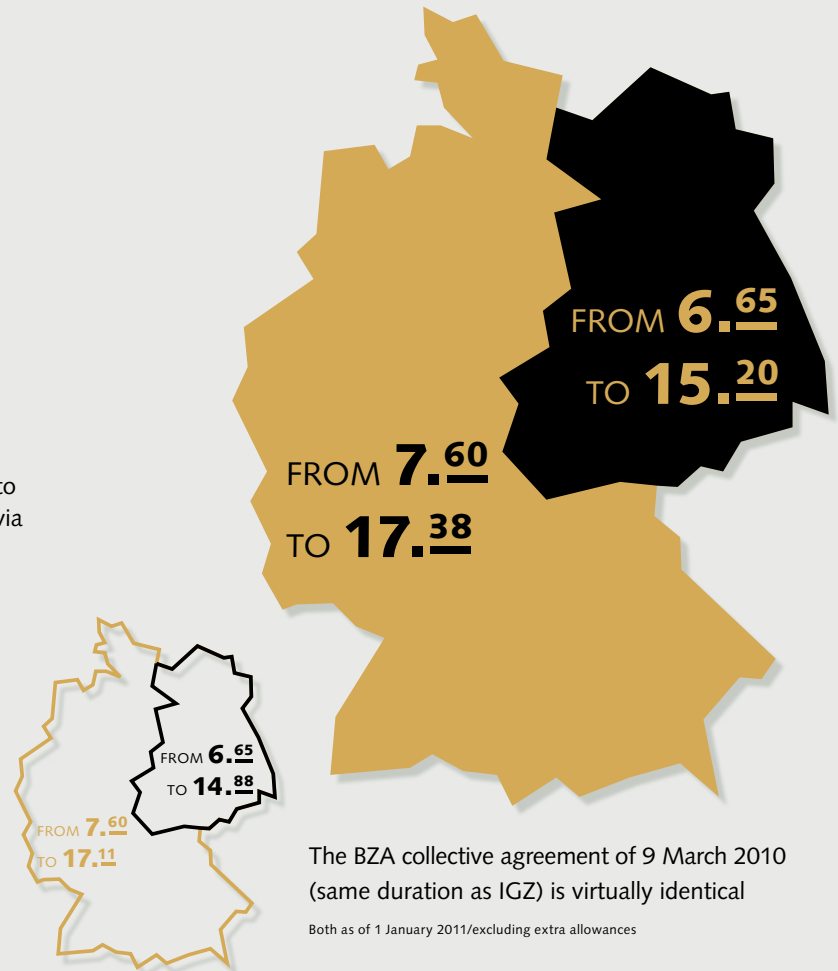
#### NO TRANSITION

of formerly unemployed persons eventually get into permanent employment via agency working.

Source: IAB study 13/2010

#### COLLECTIVELY AGREED WAGES

IGZ agreement/in euros  
Duration July 2010 to October 31, 2013



The BZA collective agreement of 9 March 2010 (same duration as IGZ) is virtually identical

Both as of 1 January 2011/excluding extra allowances

# 7,800 to 8,000

agencies operate in the market.

(IGZ estimate)

#### THE LEADING TEMPORARY WORK AGENCIES

**RANDSTAD** (Netherlands),  
**ADECCO** (Switzerland), **MANPOWER** (USA),  
**PERSONA** (Germany), **AUTOVISION** (Wolfsburg),  
**USG PEOPLE GERMANY** (Netherlands)  
**SOWIE PERSONAL, ZAG ZEITARBEITS-GESELLSCHAFT,**  
**ORIZON, TIME-PARTNER** (all Germany)

Market research company Lünendonk has more information and a list of 25 companies in all [www.luenendonk.de/zeitarbeit.php](http://www.luenendonk.de/zeitarbeit.php)

#### THE THREE EMPLOYER ASSOCIATIONS

**IGZ 1,750 COMPANIES**

**INTERESSENVERBAND DEUTSCHER ZEITARBEITSUNTERNEHMER E.V.**  
According to an IGZ survey only eight member companies have a works council

**AMP 1,100 COMPANIES**

**ARBEITGEBERVERBAND MITTELSTÄNDISCHER PERSONALDIENSTLEISTER**  
AMP is a negotiating partner of the Christian (pseudo-)trade union CGPZ; planning merger with BZA

**BZA 8,500 COMPANIES**

**BUNDESVEREINIGUNG ZEITARBEIT**  
The BZA includes the giants Randstad, Adecco and Manpower. IGZ and BZA are negotiating partners for the DGB-affiliated unions.