

"The problem of skill shortage in the field of agency work (AW) and the role of labour migration in Germany"



Bundesverband Zeitarbeit (BZA)

the German Association of Private Employment Agencies (PREAs)

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Overview

- I. Who we are and what we do
- II. Facts and Figures
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I. Who we are and what we do



1. BZA in Brief

Over 570 members

Over 2,300 member branches with 210,000 staff

Branch office located in Berlin



I. Who we are and what we do



2. The leading PREAs on the German Market



Führende Zeitarbeits- und Personaldienstleistungs-Unternehmen in Deutschland 2007

Rang	Unternehmen	Umsatz in Mio. Euro		Interne Mitarbeiter		Zeitarbeitnehmer	
		2007	2006	2007	2006	2007	2006
1	Randstad Deutschland GmbH & Co. KG, Eschborn 1)	1.475,0	1.183,0	2.594	2.233	58.400	47.011
2	Manpower GmbH & Co. KG, Frankfurt am Main *)	580,0	466,0	1.450	1.150	24.900	20.000
3	Adecco Personaldienstleistungen GmbH, Fulda 2)	579,6	474,0	1.254	1.000	26.000	20.000
4	Persona Service Verwaltungs AG & Co. KG, Lüdenscheid	573,0	536,0	1.743	1.588	17.500	16.700
5	Tuja Zeitarbeit Holding GmbH, Ingolstadt *)	462,0	355,0	708	645	17.700	10.142
6	DIS Deutscher Industrie Service AG, Düsseldorf	446,2	390,6	1.002	762	8.995	8.131
7	Hays AG, Mannheim 3)	335,0	250,0	500	400	7.000	5.000
8	Orizon GmbH, Augsburg 4)	307,1	183,5	454	300	9.035	4.680
9	TimePartner Holding GmbH, Kiel	265,0	214,0	360	300	6.400	5.220
10	ZAG Zeitarbeits-Gesellschaft GmbH, Hannover	261,0	215,0	480	430	11.000	10.000
11	L.K. Hofmann GmbH, Nürnberg	259,0	183,0	359	303	10.770	8.000
12	AutoVision GmbH, Wolfsburg	239,0	198,0	205	170	5.730	4.750
13	Trenkwalder Holding AG, München	202,5	138,6	352	175	7.335	5.253
14	Allgeier Dienstleistungs GmbH, München	200,0	164,0	450	350	8.000	6.500
15	Tempton GmbH, Essen	187,0	145,0	528	448	5.500	4.000
16	Dekra Arbeit GmbH, Stuttgart	147,1	98,3	350	180	5.000	4.000
17	USG People Germany GmbH, München 5)	140,0	126,0	325	303	6.000	5.500
18	Vedior Personaldienstleistungen GmbH, Hamburg	130,0	120,0	137	135	3.170	2.900
19	Runtime Deutschland GmbH, Bremen	112,9	88,6	201	192	3.700	2.400
20	Piening GmbH Personal-Service, Bielefeld	112,0	86,0	203	159	4.313	3.386
21	Start Zeitarbeit NRW GmbH, Duisburg	98,8	79,4	162	151	2.560	2.250
22	Amadeus FiRe AG, Frankfurt am Main	89,3	67,1	222	174	1.335	955
23	DB Zeitarbeit GmbH, Berlin	85,3	60,0	79	62	2.504	1.698
24	Job AG Personaldienstleistungen AG, Fulda	82,0	59,8	220	146	3.000	2.250
25	Allbecon Deutschland GmbH, Düsseldorf	76,6	71,0	230	211	2.724	2.462

*) Daten teilweise geschätzt

- 1) Übernahme der Bindan-Gruppe in 2006, Umsätze einschließlich Bindan ohne Yacht-Teccon
- 2) Übernahme der DIS AG in 2006; Übernahme der Tuja Gruppe in 2007
- 3) Überwiegend freie Projektmitarbeiter
- 4) Übernahme der Jobs in Time Holding GmbH in 2007
- 5) Übernahme des Geschäftsbereichs Personal Services der Allgeier Holding AG in 2008

Die Rangfolge des Rankings basiert auf kontrollierten Selbstauskünften der Unternehmen über in Deutschland bilanzierte/erwirtschaftete Umsätze.

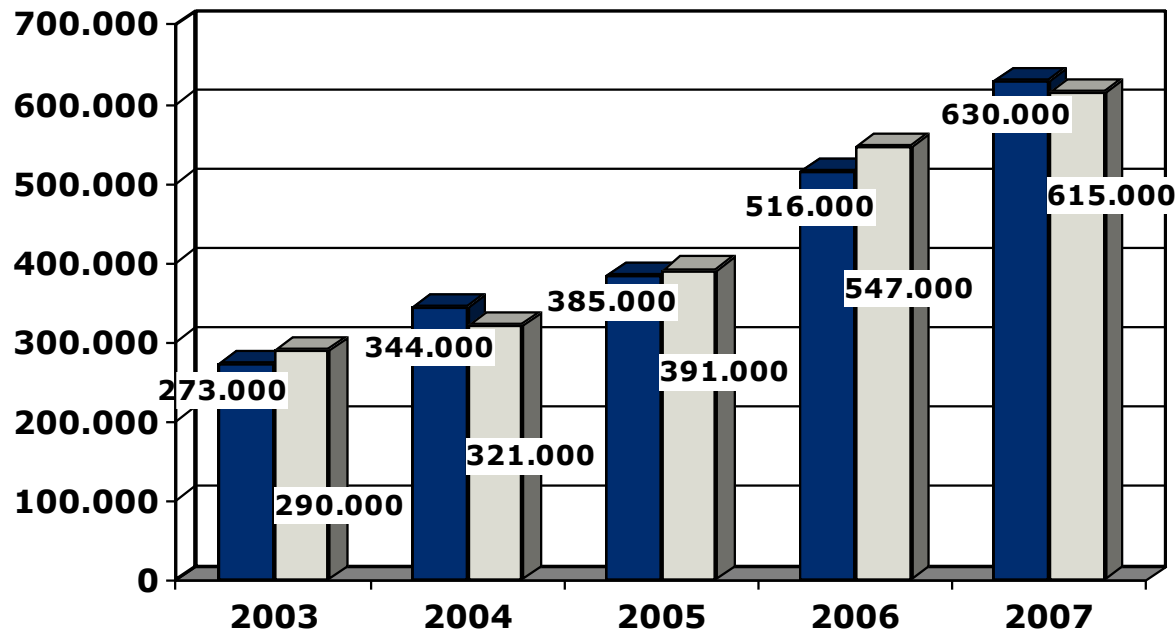
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II. Facts and Figures

1. Growth in terms of agency workers



*(Business purpose exclusively or predominantly agency work; data rounded up to thousand; fixed date June 30th and December 31st)

Source: Bundesagentur für Arbeit (German Federal Employment Agency) // © Bundesverband Zeitarbeit Personal-Dienstleistungen e.V. (BZA, German Association of Private Employment Agencies), Bonn // date: February 2008 28.10.2008 / Samuel Marseaut



II. Facts and Figures



2. Legal preconditions of agency work in Germany

- PREAs are employers after Manpower Provision Act (AÜG)
- Principle of Equal Treatment (ET): CLAs are the most relevant opportunity to opt-out from ET Principle under Manpower Provision Act (AÜG)
- Ban of assignment of Non-EU-Migrants and Migrants from new Eastern EU-Member States in AW sector



II. Facts and Figures

3. Assignment of migrants on the German (AW) market

- In June 2007, roughly 1.7 Mio. migrants held jobs which were subject to social insurance contribution, whereas the same applied to around 20 Mio. German citizens
- The share of migrants in AW is above the mentioned average and lied at 16 % in 2005 (i.e. 62.560 out of 391.000)
- Bain-Report of Eurociett and results of BZA´s Social Consult study show that AW provides an unparalleled opportunity for migrants to integrate into the labour market



III. Political Background

1. An old phenomenon, new challenges



III. Political Background

2. Problem of skill shortage

- German labour market will change dramatically
- The proceeding structural change to a services-oriented society causes supplementary pressure
- Latest estimates suggest a lack of up to 7 million qualified workers by the year 2030 in Germany
- A loss of prosperity of 4.6 billion Euros from 2004 until 2030 will be the result



III. Political Background

2. Action programme of German Government concerning labour migration

- The programme follows two objectives:

1) Opening of labour market for academics from Eastern Member States of the EU as of 01/01/2009

but transitional arrangement limiting free movement of workers from the new Member States will be extended until 2011

2) Opening of labour market for academics from Third Countries

but migration is still subject to preference principle and stay permit is granted when annual income exceeds 63.600 Euros



III. Political Background

4. Relevance for AW industry

- Action programme does not address ban of assignment of migrants in the AW sector
- EU Directive on AW foresees review of restrictions of AW industry on national level
- BZA perceives ban as such a restriction



IV. Conclusion



BZA's receivables

1. The labour market should be opened to all skilled workers either from the new Member States of the EU or from Third countries adapted to national needs;
2. The German labour market should be made as easily accessible to foreign highly-skilled professionals as possible;
3. Removal of the ban regarding the assignment of migrants in AW.



Thank you very much for your attention !

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