

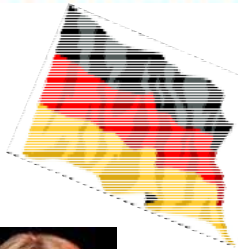
Concurrent Session: *Contingent Market Track*

Germany

Moderator: **Ton Mulders**, Director, Strategic Solutions, Europe
Staffing Industry Analysts

Panellists:

- **Beate Eggenstein**, Dipl-Jur, Lawyer, Labour Law Specialist,
Law Firm Eggenstein
- **Caroline Jones**, Global Programme Manager, Volt Consulting Group
- **Louise Robinson**, Global Commodity Director, Staffing, HR & Training
Services, Global Procurement, NCR Corporation
- **Peter Schmutzer**, Director Purchasing, Product Engineering Services,
Intel Mobile Communications

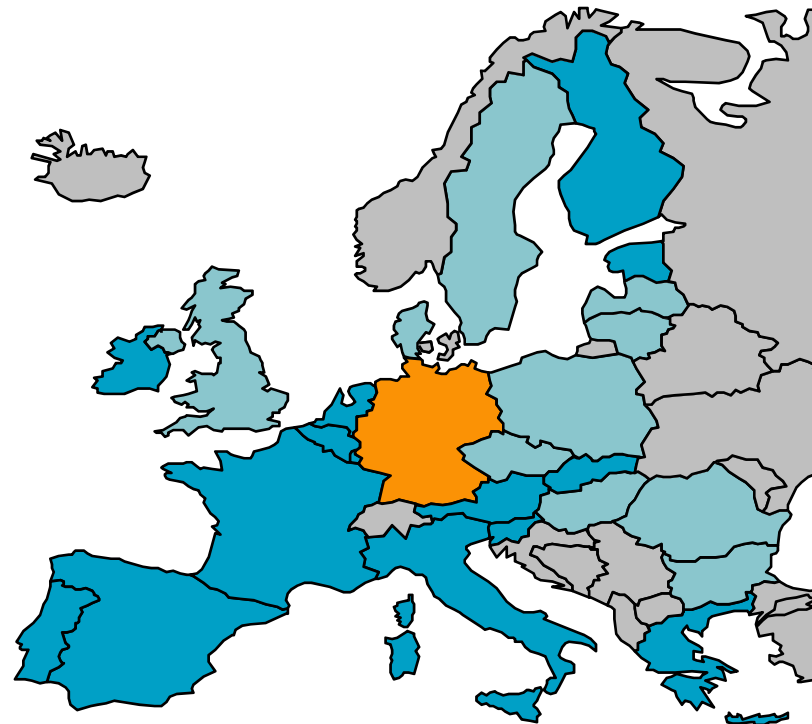


Germany: the European Giant



FORTUNE
500
2011

34



Germany



Euro

Non euro

EU - 27



Rest Europe



Berlin



Hamburg



Munich



Cologne

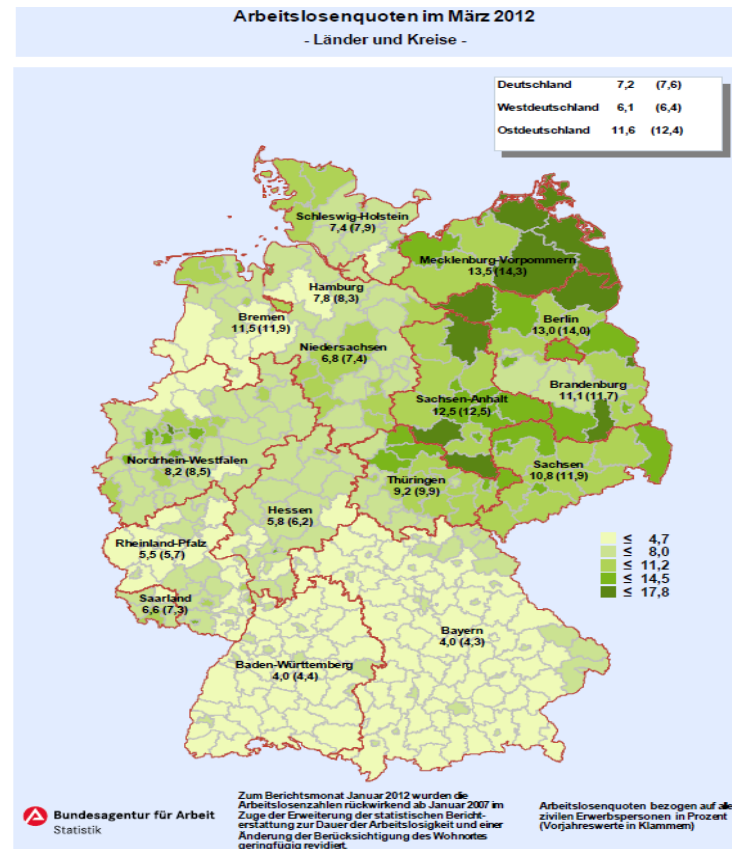


Frankfurt

Nr 1 economy in Europe, Nr 4 in the World (2011)

West and East Germany

Solidarity Contribution (Solidaritätszuschlag)

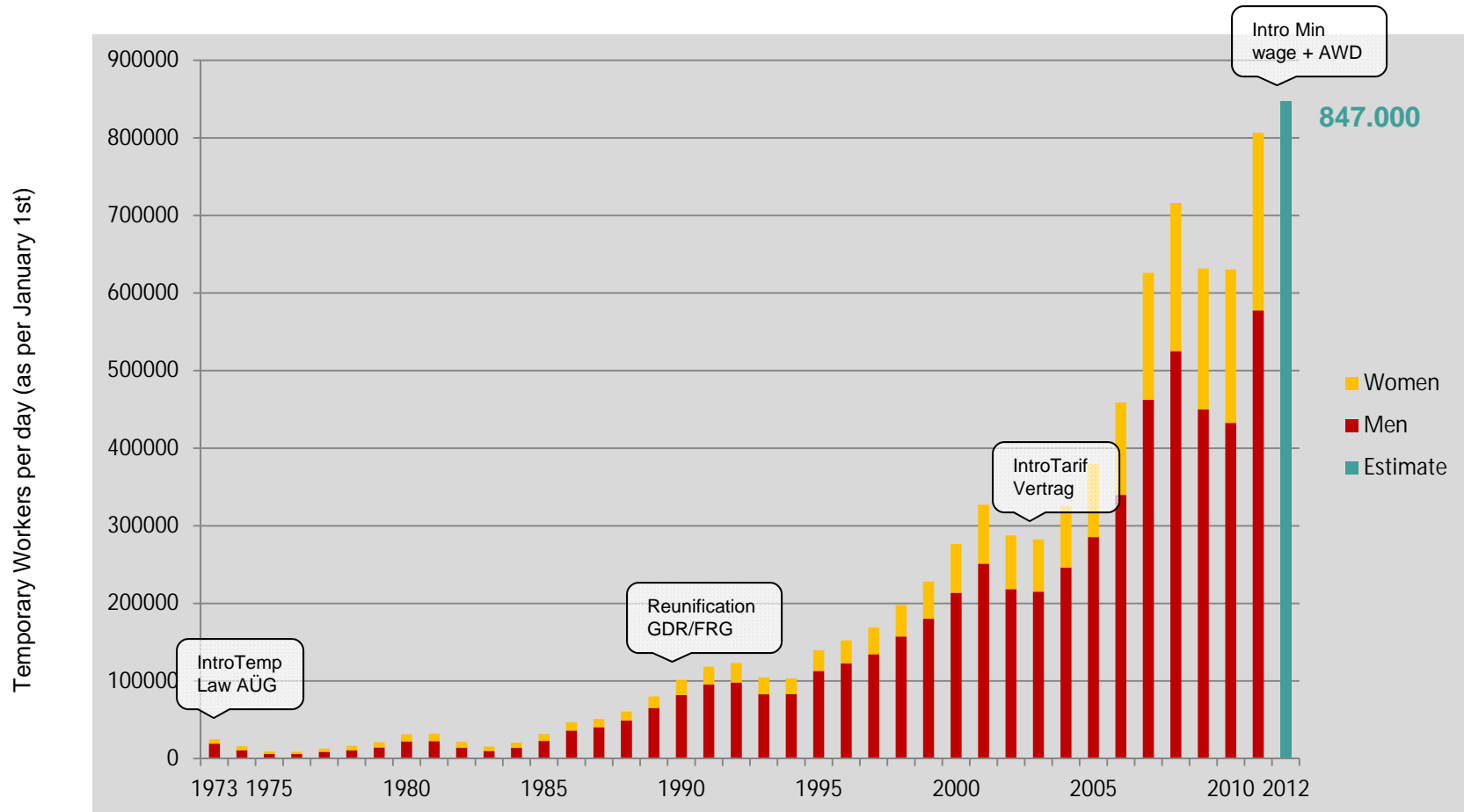


History of Temp Regulation

- 1967: Allowance Private Employment Agencies
- 1972: Temp Law AÜG
 - ~ *Licences*
 - ~ *Temp Agency employees (Lohnfortzahlung)*
- 2003: Changes:
 - ~ *Elimination duration limitation*
 - ~ *Equal Pay+ or Sector CLA (Tarifvertrag)*
- 2011: AÜG extension
 - ~ *AÜG also for non-commercial internal agencies*
- 2012: Minimum hourly wage for temps
 - ~ *As per Jan 2012: € 7,89 (west) € 7,01 (east)*
 - ~ *As per Nov 2012: € 8,19 (west) € 7,50 (east)*



Development Temp Market Germany (AÜG)

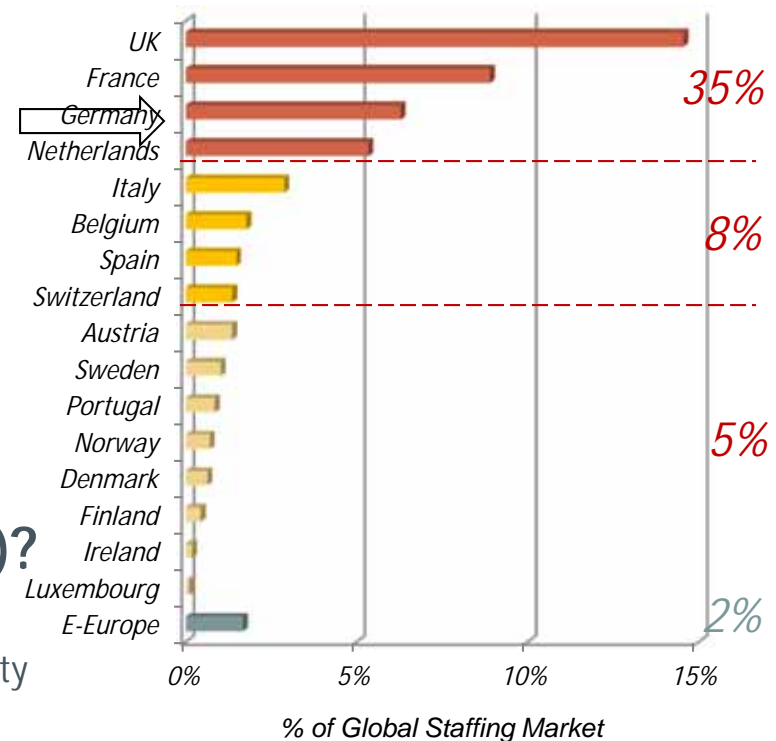


Source: Bundesagentur für Arbeit / Estimate 2012 by BAP and IW Consult

Flexible Labour Market

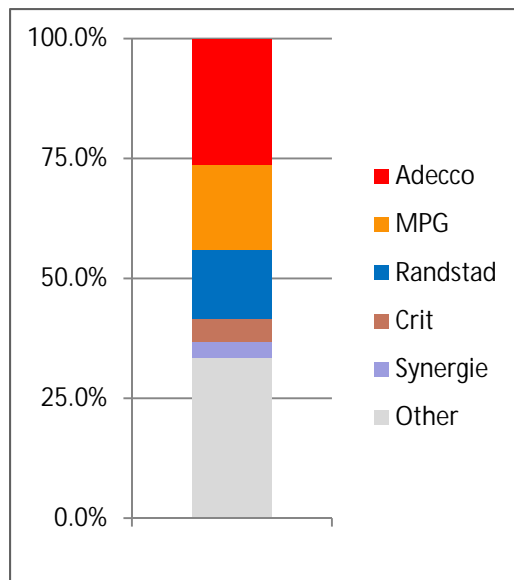
- **41.040.000 Employed (2012)**
- **800.000 Temps per Day (2012)**
 - Ca. 2% of German Employment
 - After UK, Benelux, France
 - Source: Bundesagentur für Arbeit
- **6 million Temp. Contract (2012)**
 - Ca. 15% of German Employment
 - Source: Eurostat
- **Self-employed (Freie Mitarbeiter)?**
 - No figures, but growing
 - Ca 1,1 mln at work not covered by social security
 - Sources: Bundesagentur für Arbeit
IFB (Institut für Freie Berufe)

Staffing Sector Germany:
ca. 15 billion euro



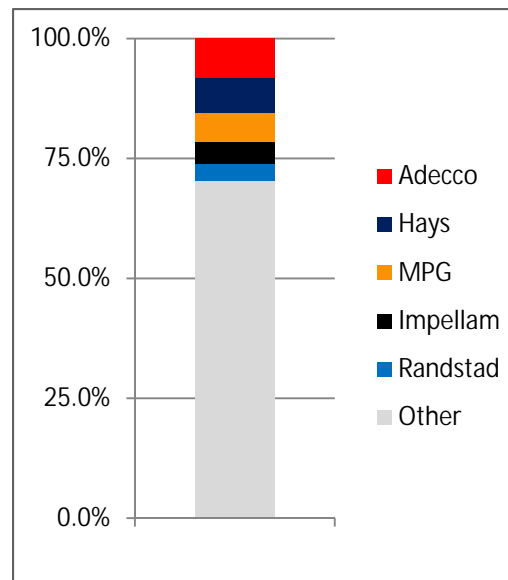
Highly Fragmented Market

France



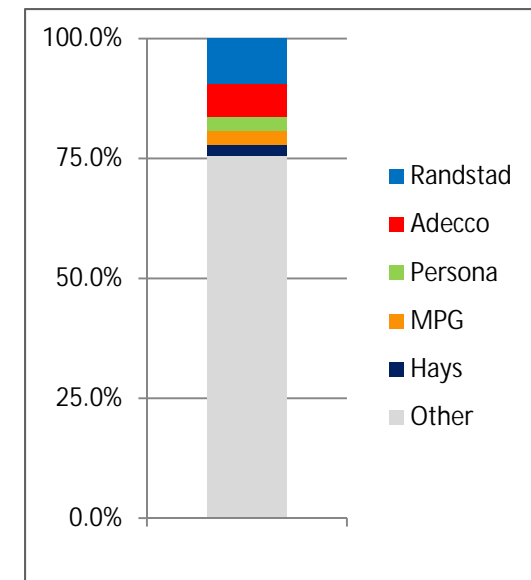
Top-5 = 67% (2009)

UK



Top-5 = 29% (2010)

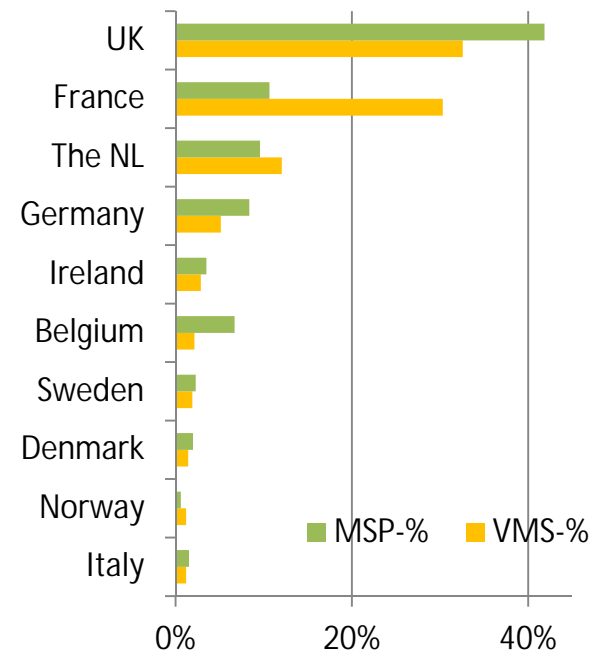
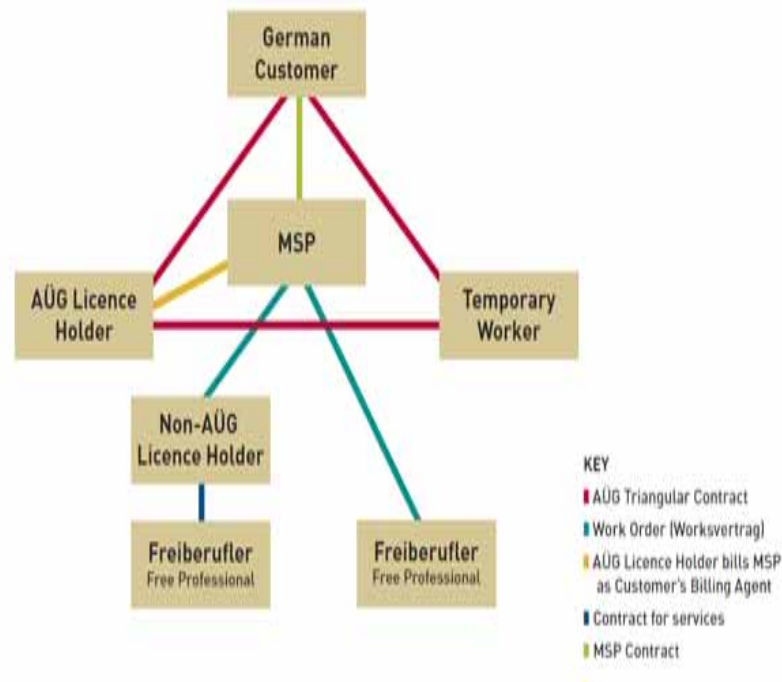
Germany



Top-5 = 24% (2010)

Source: Staffing Industry Analysts, Insight : Largest Staffing Firms

MSP and VMS in early stages



Source: Staffing Industry Analysts – “A Look at” Reports and VMS/MSP Landscape Report 2011

Trends

Selection of articles on Germany in SIA Daily News

- [04/10/2012 – Fewer Eastern Europeans enter labour market](#)
- [03/26/2012 – Labour Minister criticises malpractices in temp industry](#)
- [03/12/2012 – BMW keen to solve “temp problem”](#)
- [03/28/2012 – Temp-to-perm conversion rate improving](#)
- [03/14/2012 – Temporary work “danger to health”](#)
- [03/07/2012 – Opposition party seeking to forbid temporary work](#)
- [03/27/2012 – Temps earn half as much as permanent staff, study claims](#)
- [02/07/2012 – Lufthansa sued by union over use of temporary workers](#)
- [02/06/2012 – Employment agency underpaid staff at major supermarket chain](#)
- [02/24/2012 – Give temporary work a chance, urges Labour Minister](#)
- [01/03/2012 – SPD politician shocks staffing agencies](#)
- [01/12/2012 – Regional discrimination against agency staff catches on](#)
- [12/01/2011 – Fundamental restrictions to agency employment despite AWD](#)
- [10/05/2011 – Foreign workers are not coming despite government efforts](#)
- [09/27/2011 – Minister continues his crusade against agency employment](#)
- [04/20/2011 – First court cases decided following CGZP ruling](#)

Tightening labour
market

Opposition against
Temporary Staffing

Equal Pay

AWD

Source: Staffing Industry Analysts – Daily News

Our Panelists

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Lawyer, Labour Law Specialist
Law Firm Eggenstein, Germany
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Volt Consulting Group, UK
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Global Commodity Director,
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Director Purchasing,
Product Engineering Services,
Intel Mobile Communications, Germany



Wednesday, 16 May | 11:15 | Nine Kings Suite

Keynote:

Economic and Labour Market Trends in an Uncertain World

Dambisa Moyo

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STAFFING
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