

A worker wearing a red hard hat and a white shirt is operating machinery in a factory. The background is a blurred industrial setting with various machines and structures. A blue and white graphic element, resembling a stylized 'L' or a bracket, is positioned on the right side of the image, framing the text.

Labour Market Barometer

18th edition
April 2024

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PARTNERS OF THIS EDITION



Table of contents

Introduction	4	New employee groups as a way to overcome the ment gap	50
		Adapting the work environment to specific needs of employees	51
Report in numbers	5	What do employees think about working in diverse teams?	56
		Supporting the work of diverse teams from employee perspective	58
Salaries - whether employers will meet the expectations of employees?	7	How are companies supporting the work of diverse teams?	59
Salary changes in Q4, from the employee perspective	8		
Salary plans of employers	10	Reskilling and upskilling as a way of filling the competence gap	61
Salaries - projections for Q2 2024	11	Reskilling – are the employees willing to do it?	62
Reasons for increasing salaries	12	Who's willing to change their profession?	63
The impact of minimum wage increases on the salary policies of businesses	14	How to entice employees to change their profession?	64
Salary expectations of employees	16	How are companies supporting employee reskilling?	67
Recruitment plans	19	Counteracting employee turnover	69
Recruitment plans of companies	20	Employee turnover as an HR issue	70
Whom are companies planning to hire?	22	What are employers doing to counteract turnover?	71
Employee plans to seek new jobs	25	Employee satisfaction in their current jobs	72
Who's planning to change their job?	26	Who's satisfied with their current job?	73
Are the employees afraid of terminations?	27	Reasons for seeking a new job	74
Who's afraid of losing their job?	28	What motivates people to stay at their current companies?	75
Proactive stance of employees on the job market	30	Non-wage benefits	77
How are employees looking for work?	32	Professional growth opportunities and the appraisal of employers	78
Methods of job seeking across age groups	33	How are companies supporting the professional growth of their employees?	79
Methods of job seeking across places of residence	34	Employee preferences concerning the support for their professional growth	83
Methods of seeking employees	35	What are the employees' preferred areas of development?	87
Recruitment methods - how are companies and candidates connecting?	36		
Recruitment difficulties	37	Gi Group Holding – the global HR services ecosystem	89
Employee shortage from the employer perspective	38		
Causes of recruitment difficulties	39	Research methodology	90
How are companies approaching recruitment difficulties and employee shortages?	40	Demographic structure of research sample - employers	91
		Demographic structure of research sample - employees	92
Counteracting employee shortages - employing foreigners	41		
Is hiring foreigners the answer to employee shortages?	42		
Origin of foreigners working in Polish companies	43		
Employing foreigners - company plans	44		
Difficulties with employing foreigners	46		
Hiring foreigners from employee perspective	49		



Marcos Segador Arrebola

Managing Director of Gi Group Holding in Poland

According to experts, the year 2024 will be characterized by economic growth, set to exceed 3% this year. The inflation forecast, almost half lower than last year, and the increase in the minimum wage will have an impact on the growth of real incomes of Poles, which will translate into a significant increase in consumption and in turn have a positive impact on company operations. The improving sentiments among entrepreneurs are already being influenced by unlocking of some KPO program funds and the government announcements concerning support for entrepreneurs.

Although market data already suggests a recovery, companies remain uncertain about the future. They are afraid of further cost increases and are concerned about the geopolitical situation. In result, they maintain budgetary discipline, are cautious in making business decisions, increasing employment or salaries that go beyond the increase in the minimum wage.

This is reflected in the results of our latest Labour Market Barometer, including our employment plans. Only one in eight employers declares their willingness to increase staff in the next quarter. The vast majority of organizations forecast that they will retain the current number of employees – 78% intend to do so without recruitment, and three times less by hiring new people.

Another example of the ongoing uncertainty is the high percentage of companies that have not yet made decisions regarding salary changes in the coming quarter. At the same time, the percentage of companies planning to maintain the current level of remuneration decreased slightly, from nearly 66% to over 59%. As in the previous year, a fourth of them want to implement pay rises. The vast majority is motivated by increased minimum wage, with other major factors being inflation and the desire to avoid flattening wages. On the other hand, a much more commonly cited reason for increasing salaries is the desire to retain employees. Without a doubt, this is a response to difficulties in recruiting employees with the required qualifications.

Staff shortages remain a significant challenge in the job market, caused largely by shrinking population and technological transformation, both of which force changes in the job structure. In this context, the continuing openness of Poles to upskilling and retraining in order to adapt to the needs of the market is a welcome phenomenon. Currently, nearly 40% of employees are considering changing their profession, and this number is even higher for those worried about losing their job or planning to change their workplace.

Furthermore, the demographic winter means an increase in the share of foreign employees in Poland. While 10 years ago their number did not exceed 100,000, by the end of last year it was already over a million. The vast majority of them are Ukrainian citizens. However, even this number is insufficient to fill the staffing gap. Therefore, entrepreneurs are opening up to employing people from overseas places, such as Colombia, Nepal or the Philippines. Despite the difficulties arising from cultural differences, varying work standards and the time needed to deal with formalities, their number has more than doubled in the last year.

Reports of staff shortages confirm the widespread belief that despite various upsets, the market is in employees' favor. The workers remain optimistic about the future of employment, with 56% not worried about layoffs and 60% expecting a salary increase. This is also why we are observing an increasing readiness to change employers – compared to 2023, the percentage of people interested in taking such steps increased by more than 5 p.p., marking the highest result since 2018.

What kind of employees do companies need? How do employees see their future?

I cordially invite you to read it.

Report in numbers

Employers



employers plan to retain the current salary levels



of companies plan to raise wages across the board to maintain the internal salary balance



of businesses plan to retain the current employment levels



of companies have faced difficulties acquiring employees in the past few months



of businesses are currently employing foreigners



of employers lack a well-defined action plan to limit employee turnover



of employers do not support their employees in upskilling or reskilling initiatives

Report in numbers

Employees



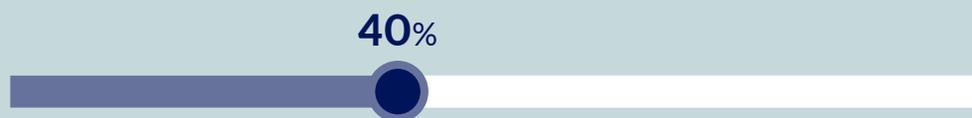
of employees expect a pay raise in the coming months



of employees are seeking a new job



of those afraid of losing their job or planning to change it are actively seeking a new employer



of employees consider reskilling



of employees consider the offered professional growth opportunities to be an important factor when choosing to continue employment in a given workplace



of employees are satisfied with their current job



of employees are interested in improving their digital skills



CHAPTER 1

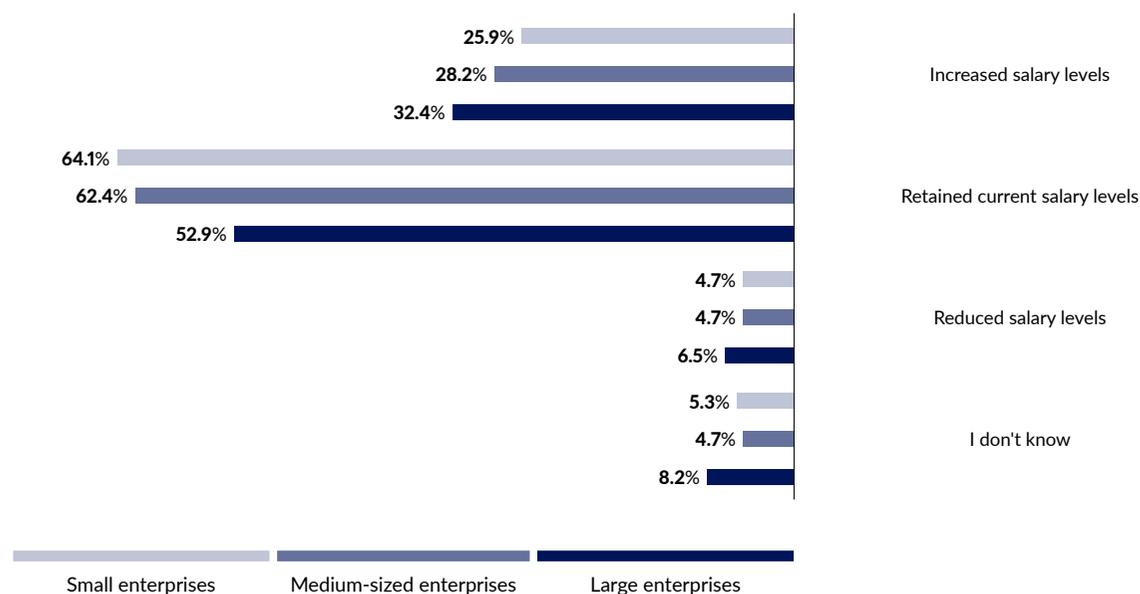
Salaries - whether employers will meet the expectations of employees?

Salary changes in Q4, from the employee perspective

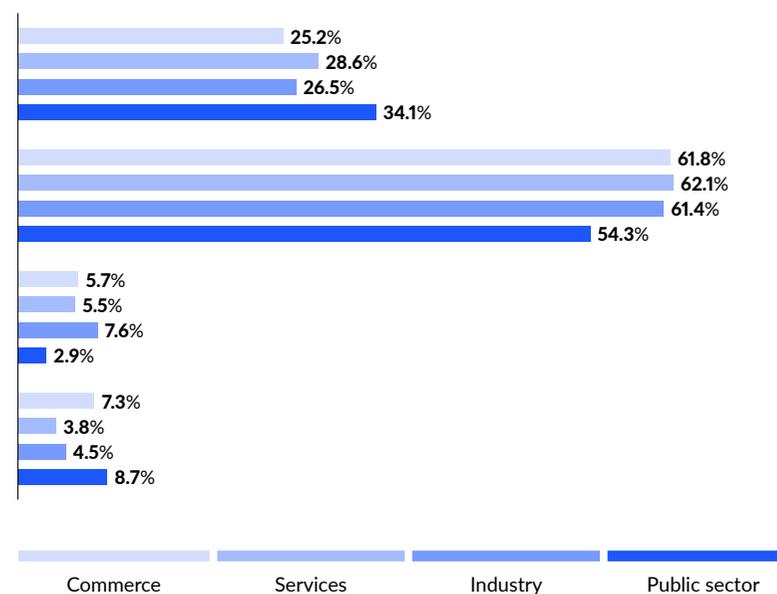
In Q4 2023, almost 29% of businesses have raised the salaries of their employees, marking a similar result to that noted in the previous year (30% in 2022).

Almost 60% of all researched businesses have retained their current salary levels. 5.3% declared decreasing salaries – this usually concerned large businesses (6.5%) and the industrial sector (7.6%). The overall dynamics were similar to that of Q4 2022, with a slight downward trend. Back then, 65.9% of businesses declared retaining their current salary levels, while only 0.8% saw a drop.

Salary changes across company sizes



Salary changes across sectors



Salary changes in Q4 2023 - companies

28.8%

of businesses raised salaries

59.8%

of businesses retained previous salary levels

5.3%

of businesses decreased salaries

6.1%

of businesses couldn't answer

Salary changes in Q4, from the employee perspective

Who received a pay rise in Q4 2023?

The largest increase concerned the youngest workers (28-24 years).

Over a half of them received pay rises, which also tended to be the highest. Almost 44% of the respondents from this age group declared a pay rise of 11-20%, and further 19% declared an increase of 21-30%. Here are several possible reasons for this group receiving such a high raises. First, the young employees often are paid less, so even a small increase can form a notable percentage of their salary. Furthermore, in case of some of them, the pay rise may be due to them changing employers – and it is the youngest employees who are most open for changing jobs and most likely to take such a step. However, it bears mentioning that a fifth of this age group have declared a pay decrease.

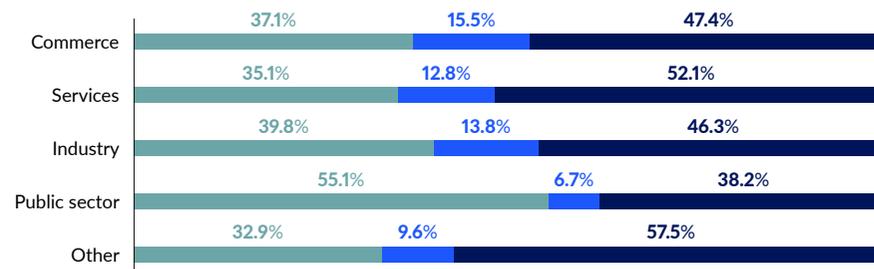
The smallest pay rise concerned the lower ranking and blue collar workers. Most of the time, they stayed under 10%.

The public sector employees were most likely to receive a pay rise (55%), while service sector was most reluctant to to increase salaries (35%). Residents of large cities were less also likely to receive a pay rise, though once they took place, they tended to be higher than those of their colleagues from smaller towns.

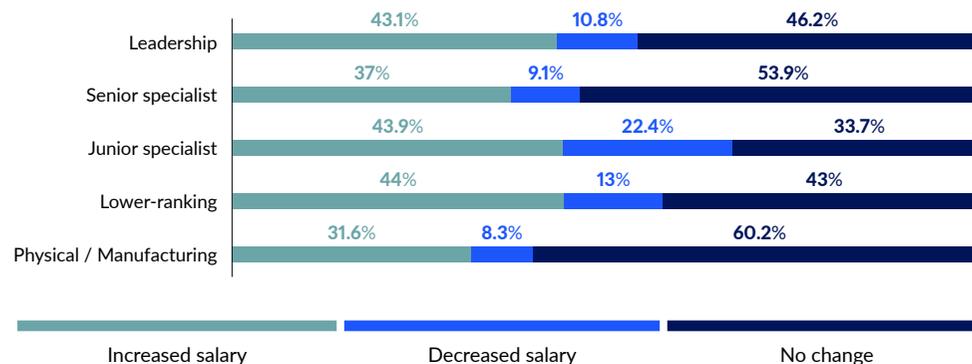
In terms of salary changes over Q4 2023, one could observe a discrepancy between the declarations of employees and their employers.

38.9% of respondents said that their salaries have increased (a similar value to that of the previous year), marking a slight increase. However, as many as **12.2% have declared a salary decrease** (an increase of 1.3% as compared to 2022). Almost 41% of the pay rises did not exceed 10% of the previous salary, with further 39.7% of pay rises amounting to an 11-20% increase.

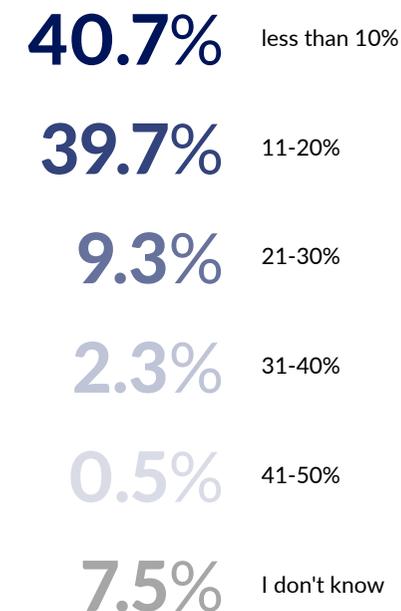
Salary change across sectors



Salary change across positions



How much did your salary increase, percentage-wise?



In the last quarter, did your salary:

38.9%

Increase

12.2%

Decrease

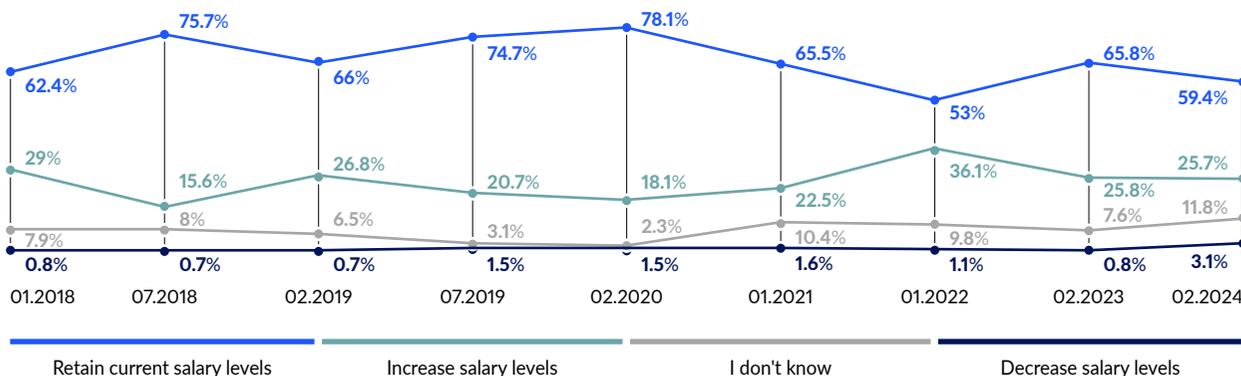
48.9%

Remained the same

Salary plans of employers

The percentage of employers who declared implementing pay rises proved similar to that of the previous year (25.7%). The number of businesses planning to retain the current salary levels decreased slightly (from 65.8% to 59.4%) and the number of entrepreneurs looking to decrease salaries has grown (from 0.8% to 3.1%). It also bears pointing out the increase in the number of businesses lacking well-defined plans (who answered „I don't know“). This has been particularly visible among the largest companies (an increase of 10 percentage points y/y). When asked about pay rises in the period of April to July, the situation proved similar – as many as 27.8% of companies were unable to define clear plans in this regard. This suggests that employers maintain caution when dealing with the prolonged uncertainty of the economic conditions and pay close attention to factors generating the highest expenses. This leads them towards a preference for flexible approaches and adjusting their plans on the go, in reaction to the current state of the job market.

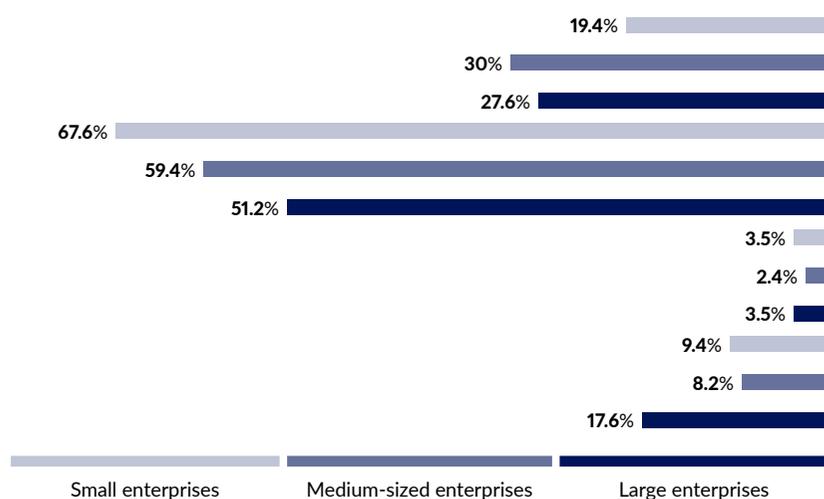
Planned salary changes over past years



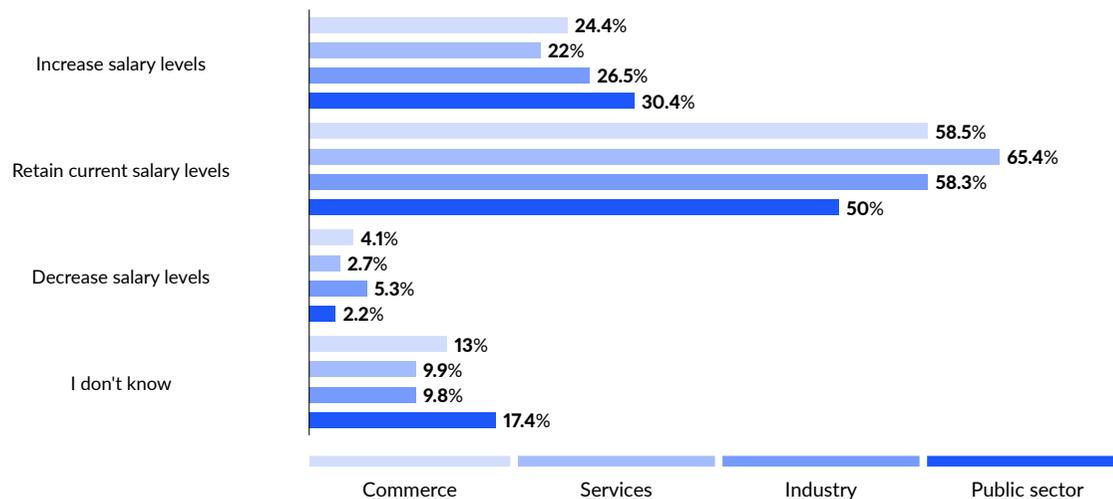
In the upcoming quarter, are you planning to:



Planned salary changes across company sizes



Planned salary changes across sectors

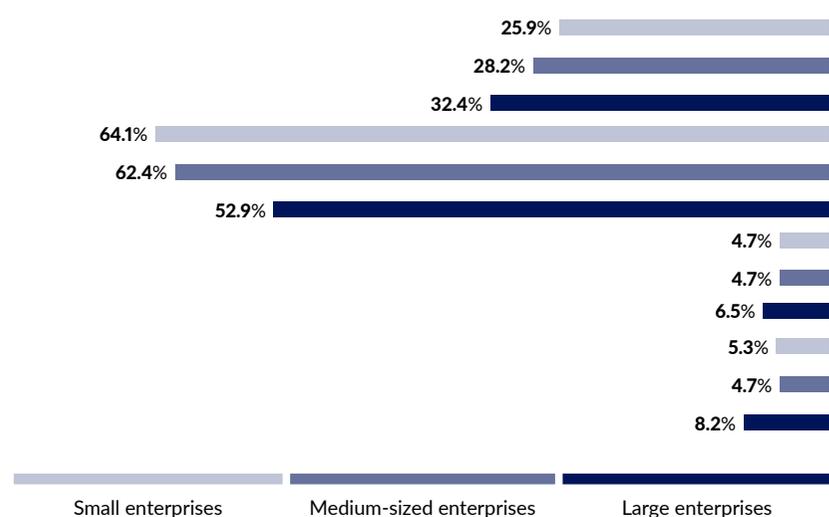


Salaries - projections for Q2 2024

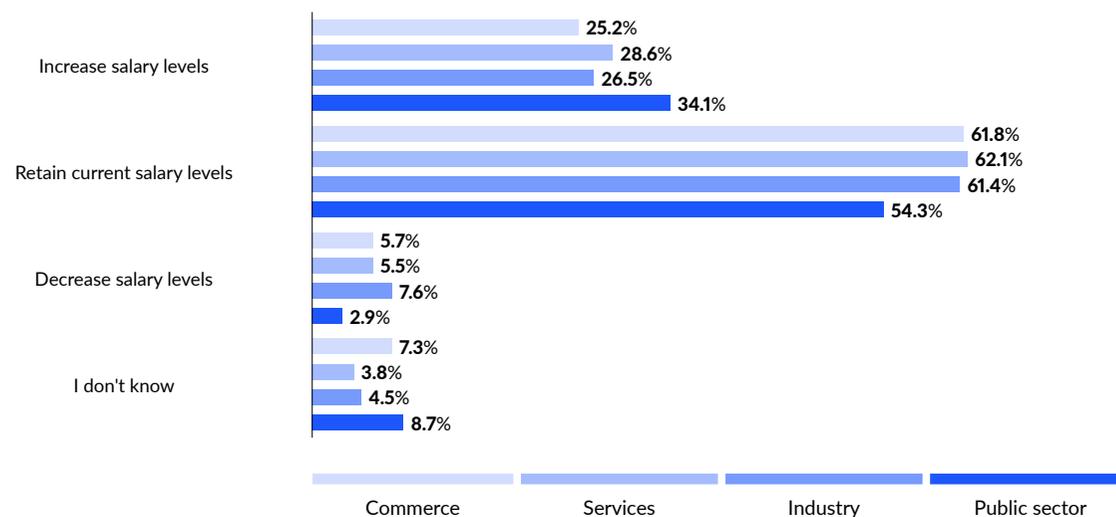
Who's planning pay rises in Q2 2024?

A fourth of all surveyed businesses are planning to increase salaries in Q2 this year. The largest companies are more likely to do so (over 32%), as does the public sector (34%). Almost **43% of businesses expect to retain the current salary levels**, though this tends to concern smaller entities. There is little differentiation in this regard between various industries. Salary decreases are expected by industrial workers (as declared by 7.6% of companies in this group). Almost 28% of companies are unable to make unambiguous declarations in this regard, which – as we've mentioned earlier – could be caused by high caution and adjusting to the ever-changing economic circumstances.

Planned salary changes across company sizes Q2 2024



Planned salary changes across sectors Q2 2024



In the period of April-July 2024, are you planning to:

25.5%

Increase salary levels

42.7%

Retain current salary levels

3.9%

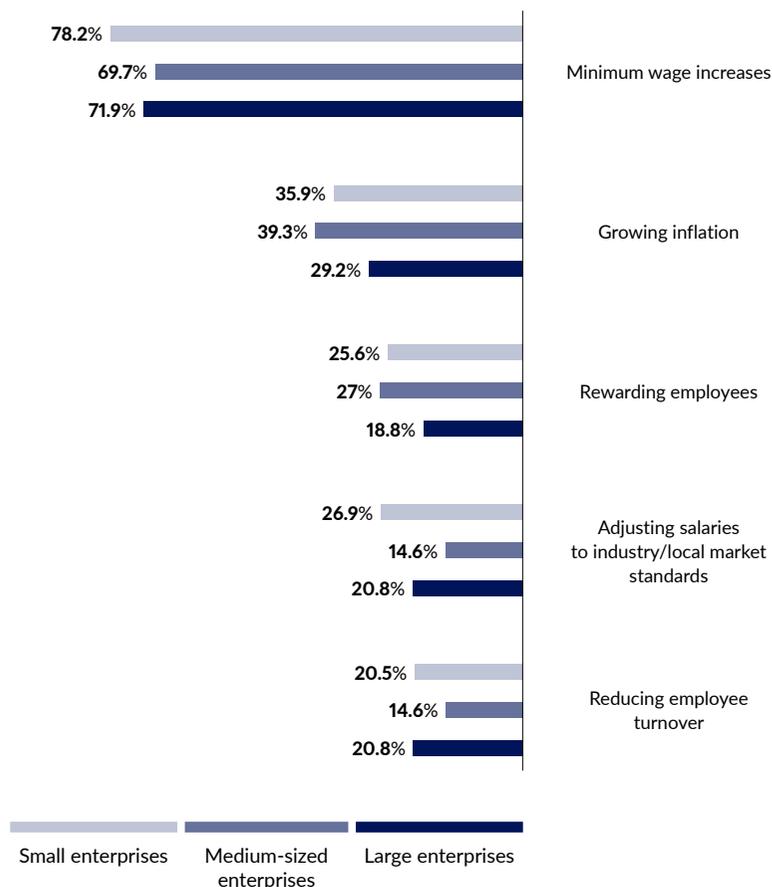
Decrease salary levels

27.8%

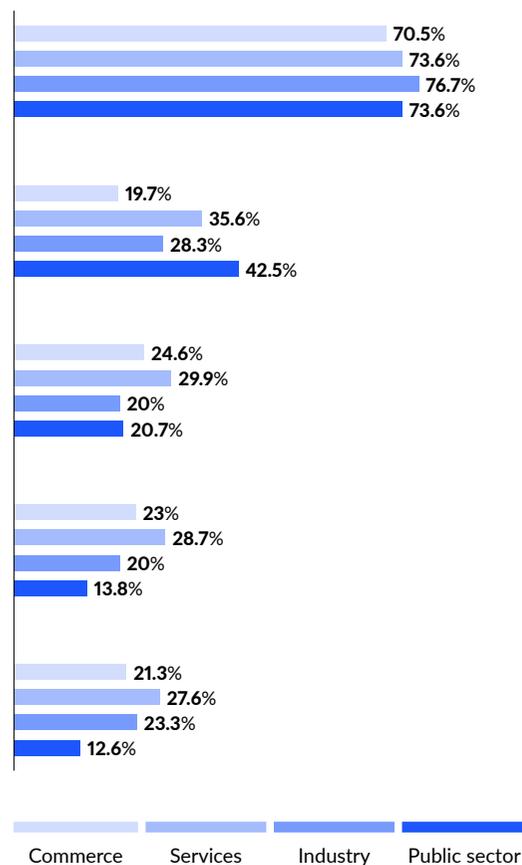
I don't know

Reasons for increasing salaries

Reasons for salary increases across company sizes



Reasons for salary increases across sectors



The growing minimum wage is the key factor behind the salary increases, whose impact was felt even more keenly than in the year before (an increase of 4.2 percentage points, up to 73%). Regardless of their size and industry, the businesses are pointing toward it as the key reason for implementing the pay raises. However, it's been particularly noticeable among the smaller companies and in the industrial sector, where the pay tends to be close to the minimal wage – therefore, its increase has a greater impact on the overall salary levels.

The importance of the inflation rate as a factor behind pay rises has greatly decreased (from 62% to 35%, a drop of 27.1 p.p.). Today, it tends to drive wages primarily in small and mid-sized enterprises, as well as the services and public sectors. They may be only now catching up to larger businesses, industry and commerce sectors in terms of adjusting for inflation. **The businesses are also less likely to reward their employees with pay raises** (23.6%, a drop of 9.2 p.p. y/y). This drop is felt most keenly among the largest companies – going from 47.8% to 18.8% (-29 p.p.). This might be caused by seeking savings, especially in the case of the largest companies dealing with expenses on a larger scale. The industrial and public sectors proved least likely to express satisfaction through pay rises.

Much more often, the businesses are using pay rises to reduce employee turnover (18.6% as of writing, marking an increase of 8.1 p.p. y/y). This is especially true of both the smallest and biggest entities, most often in the business services. Another increasingly common reason behind salary increases is **wanting to attract local candidates** (an increase of 15.8 p.p., from under 5% a year ago to over 20%). This is most common among the smallest businesses (26.9%) and the services sector (28.7%).

Respondents could select multiple answers.

Question answered by the businesses that either increased salaries in the last quarter or are planning to do so.



Anna Wesołowska

Managing Director, Gi Group Poland

Pay rises? Yes, but not for everyone

Despite the experts predicting a market upswing and positive economic indicators, entrepreneurs remain cautious toward both recruitment and salary policies. Much like in the previous year, almost 60% of businesses are planning to retain the current salary levels in the upcoming quarter, while a fourth plans to raise pay.

At the same time, worryingly, the number of companies planning to lower salaries has decreased. In this year's research, it reached almost 12% of companies, but the overall trend has been stable for the last three years. On one hand, this points toward companies waiting cautiously, postponing their decisions and patiently observing the demand and other market trends, as well as the geopolitical situation. On the other hand, this shows the changing approach to planning. Experience of the pandemic and the past few years have taught businesses that the flexibility and adaptability to a changing environment are key for running a business. The decisions concerning salary or employment levels are taken ad hoc, taking into account the current demand and situation on the local job markets.

It certainly bears mentioning the reasons for increased pay. The ongoing inflation proved a less important factor than a year ago, pointed out by 34.6% of companies (as compared to 62% previously). The first place was taken over by the increased minimum wage, pointed out by 73% of companies. Taking into account the share of expenditures that salaries comprise, the rising minimum wage is certainly a challenge – especially given its impact on the overall salary policy. In an attempt to avoid flattening wages, a third of all businesses expect to also increase salaries of those already earning above the minimum wage and a fourth plan to increase wages of some employees. Employee satisfaction is also to be improved by introducing additional non-wage benefits. The businesses are well aware that increasing salaries of their more experienced employees, while costly, is still a cheaper solution than recruiting and training new workers. And without such a pay raise, many of them will choose to seek a new job.

Interestingly, number of companies using pay raises as a way of appreciating their employees is falling. Among the largest enterprises, it is up to 29 p.p. ago as compared to the previous year. However, it bears pointing out that both the data and our own talks with the clients suggest that this change doesn't mean the businesses no longer appreciate their employees. Rather, they are limited by the budgets and the need to maintain certain productivity levels requiring certain spending discipline.

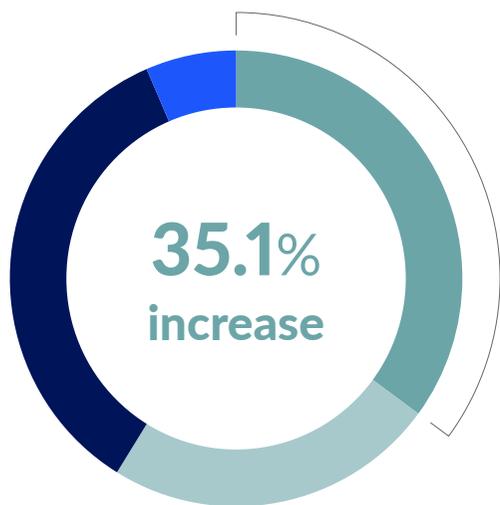
What do the employees themselves have to say about the salaries? It bears remembering that the financial factors are decisive for work satisfaction regardless of the industry. For almost half of the employees, it is the single most important factor when deciding to seek a new job. This is reflected by the data: while 68% of the respondents are content with their current job and 56% aren't afraid of losing it, as many as 54% are planning to seek a new employer within two years. Employees are growing increasingly proactive, with 65% of those thinking about a new job, or afraid of losing their current one, actively seeking employment. Taking into account that almost a half of all respondents cited low salary as the main reason for their willingness to find a new job, one should conclude it being the primary deciding factor in employment-related decisions. It therefore should be of little surprise that the wage pressure remains strong, at a similar level than a year ago. These expectations are a result of increasing costs of living and – oftentimes – growing scope of obligations and employer requirements. However, this pressure is decreasing slightly. While approx. 60% of respondents expect a pay rise, much like a year ago, the percentage of people expecting to retain their current salary levels has increased by 3.5 p.p.

The impact of minimum wage increases on the salary policies of businesses

Over 35% of businesses are planning overall pay rises due to the rising minimal wage to retain wage balance and avoid disproportionate earnings between various groups of their employees. Most often, this concerns public and commerce sector businesses (42% and 36.6%, respectively), as well as large enterprises. A further 23.7% of companies plan to only increase the wages of some employees whose earnings exceeded the minimum wage. For them, the decision to increase one's wage will depend on analyzing the roles of these employees and their current salaries. Such increases are expected primarily in the largest companies (26.5%) and the industrial sector (28%).

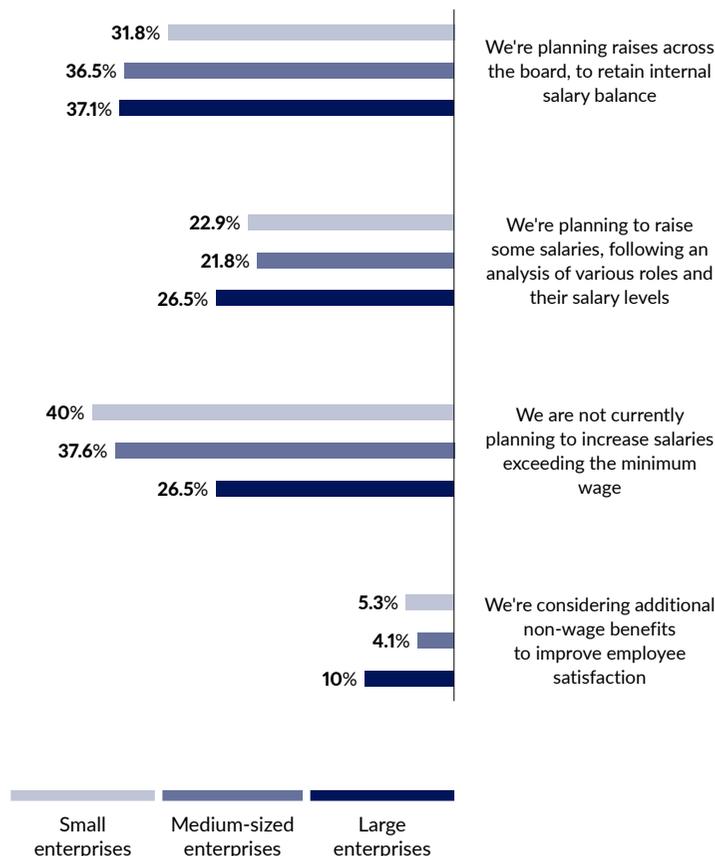
6.5% of employers plan to recompense the minimum wage increases by offering additional non-wage benefits. This strategy is most common among the largest companies (a tenth of them). This should come as little surprise, given their much broader offer of employee benefits, matching which is often unfeasible for smaller entities.

Given the minimum wage increases that took place this year (in January and July 2024), are you planning to change the salaries or non-wage benefits of workers whose current earnings exceed the minimum wage?

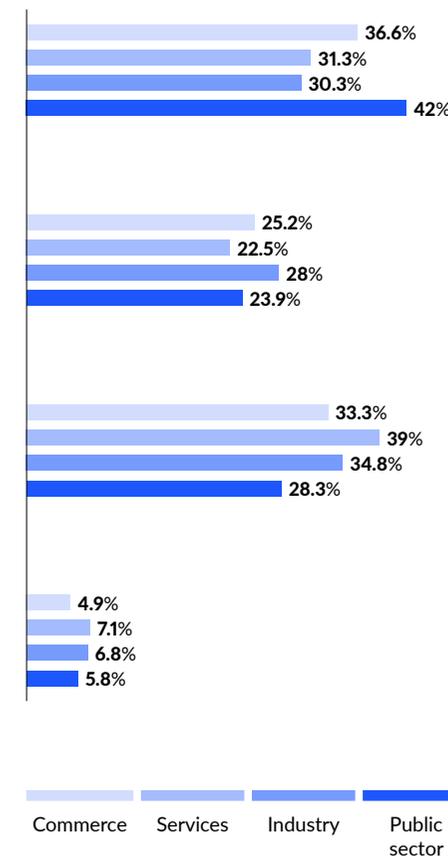


- 35.1% We're raises across the board, to retain internal salary balance
- 23.7% We're planning to raise some salaries, following an analysis of various roles and their salary levels
- 34.7% We are not currently planning to increase salaries exceeding the minimum wage
- 6.5% We're considering additional non-wage benefits to improve employee satisfaction

Planned salary changes across company sizes



Planned salary changes across sectors





prof. Grażyna Spytek-Bandurska

an expert of the Polish Entrepreneur Federation

Salaries and the competitive advantage of businesses

The salary policy is an important measure for maintaining and strengthening the competitive advantage of businesses. It bears analyzing this issue in the context of this year's increase in minimum pay.

Raising the minimum wage doesn't necessarily have a positive impact on the salary grid, as it can lead to flattening the salary curve. This in turn can evoke dissatisfaction of those who used to earn more, spurring accusations of unequal treatment, as well as impacting motivation and willingness to improve one's qualifications. A possible solution would be to increase salaries across the board, however, the current economic situation, including high operational costs, might mean not everyone can afford that. This is why a well-defined human resources strategy is so important. If a company is unable to raise wages, it should consider offering various attractive non-wage benefits. I'm thinking of such non-material gratifications as more flexible work hours (activity-based, dynamic systems), the ability to work remotely or in a hybrid mode, promoting atypical forms of employment, organizing trainings or implementing work-life balance programs. In terms of material non-wage benefits, the employers can offer insurance policies, cover medical costs, provide meals, company equipment, lease apartments or subsidize education.

Undoubtedly, payment of salaries exceeding the market average will help maintain effective company operations. However, one must stay reasonable – raising the minimum wage too quickly can lead to excessive costs and make maintaining a stable market position more difficult. As a result, this could bring opposite results to those intended.

The salary policy is a key personnel management tool used to differentiate employment terms based on objective criteria. Higher wages should be implemented when the employees are independent and it's difficult to control their work, or when their competences vary greatly. From the employer's perspective, the inconvenience and expense of candidate acquisition, and the overall unprofitability of changing personnel, offer practical justification for keeping salaries high. Higher wages also help maintain proper work discipline, protect investments in human capital and stave off the 'negative selection' phenomenon. From a long-term perspective, excessively high wages have the side-effects of limiting the number of possible vacancies and thus also increasing unemployment.

It bears pointing out that the salary levels are a function of employee productivity. When it's low, it's impossible to compete with wages. At the same time, the more mismatched the demand for labor and its supply are, the higher the wage pressure.

In the near future, this topic will prove increasingly important due to the implementation of the EU directive on adequate pay, aiming to improve work conditions and the quality of life. It will expand the scope of collective bargaining, especially concerning wage negotiations on a sectoral or intersectoral level. The directive will introduce incentives for social partners to hold constructive, substantive and conscious wage negotiations.

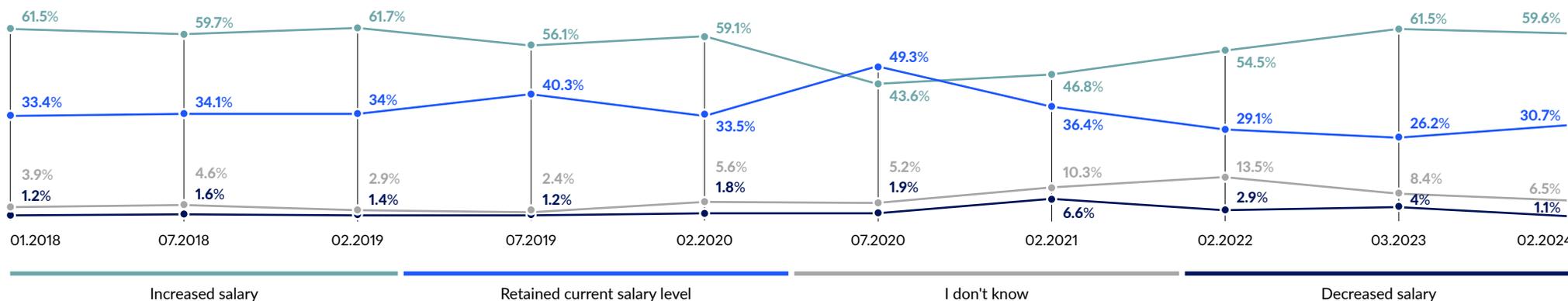
Salary expectations of employees

Almost 60% of the employees are expecting salary increases in the coming months. This is slightly less than a year before (-1.9 p.p.). The percentage of people expecting their salary to remain at a similar level increased by 4.5 p.p. – making for a third of respondents (30.7%). A decrease is expected by only 1.1% of the respondents. This year's **salary expectations are close to those observed before the outbreak of the COVID-19 pandemic in early 2020.**

Employee wage pressure remains strong, although one can observe a slight weakening. In the last quarter of 2023, almost 39% of all employees have gotten a raise – marking an almost identical result to Q4 2022. Despite that, current salary growth expectations are slightly lower than a year ago.

The lower inflation rate and a slowdown in price increases. While one could still describe the current situation at large as an employee market and a human resources deficit, some sectors and regions are seeing a slowdown, leading to decreased demand for workers. Locally, the job market can be saturated, making it more difficult for the workers to negotiate better wages and impacting the results of our research. However, it bears mentioning that the decrease in expected salaries is fairly small and might prove a temporary phenomenon.

Expected salary changes over past years



In terms of salary, what are your expectations for the coming months?

59.6%

Increased salary level

30.7%

Retaining current salary level

1.1%

Decreased salary level

6.5%

I don't know

Salary expectations of employees

Who is expecting a pay rise?

We found the employees aged 25-54 to have the highest salary expectations, although their percentage share is slightly lower than a year ago. On the other hand, more people expect to retain their current salary level. Workers employed in the **commerce sector (65%), manufacturing/physical labor (71%) and lower-ranking employees (62%) are most likely to expect a pay rise. People in leadership positions and junior specialists have smaller expectations.** Interestingly, the residents of smaller towns (20-99 thousand residents) are most likely to expect a pay rise, while people from the largest urban centers are least likely to do so.

The groups most likely to expect to retain their current salaries, are the youngest employees aged 28-24 (36.1%), service sector workers (36.2%), people in leadership positions (41.5%) and junior specialists (36.7%).

Among the respondents expecting pay rises in the coming months, **the largest group (41.8%) expects an increase of 11-20%. A fourth of all employees hope for an even bigger rise, ranging between 21 and 30 percent.** At the same time, almost **a fifth (18.9%) expects a raise of no more than 10%.** The large rises are expected primarily by the senior specialists (43.3% expect an increase of 11-20% and almost 29% expect to earn 21-30% more). The older a person, the bigger the expected pay rise.

How much of a pay rise do you expect?

18.9%

0 - 10%

41.8%

11% - 20%

24.1%

21% - 30%

6.4%

31% - 40%

1.2%

41% - 50%

2.1%

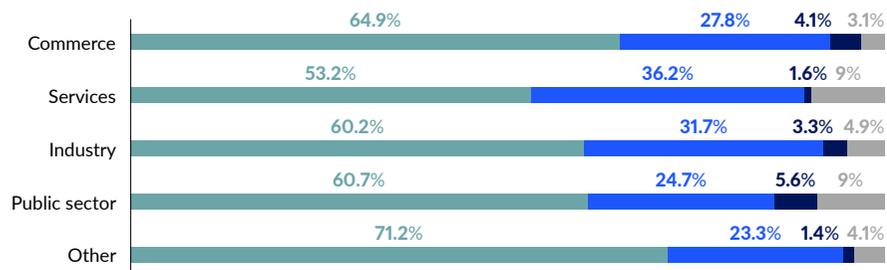
51% or more

5.5%

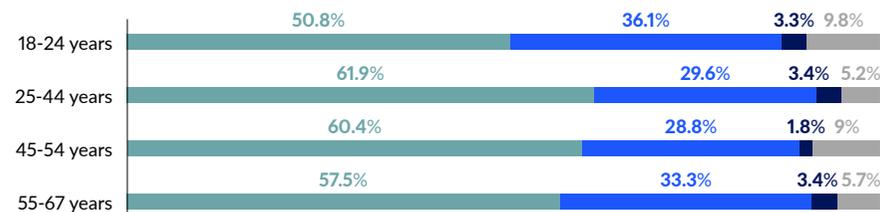
I don't know

Salary expectations of employees

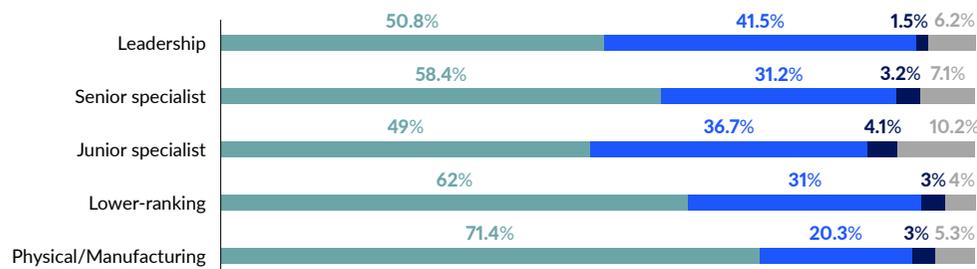
Salary expectations across sectors



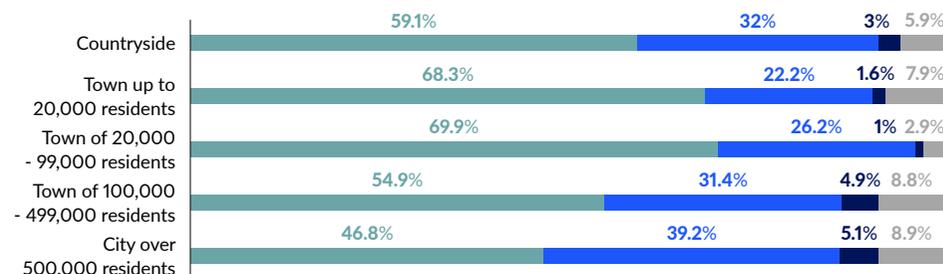
Salary expectations across age groups



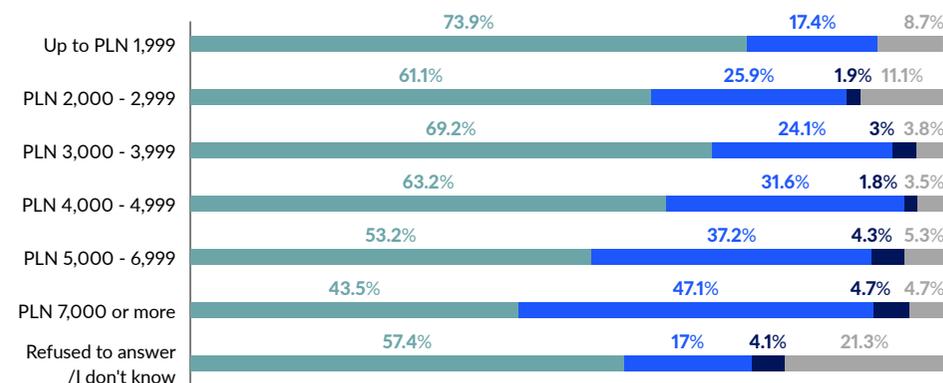
Salary expectations across positions



Salary expectations across place of residence



Salary expectations across salary levels





CHAPTER 2

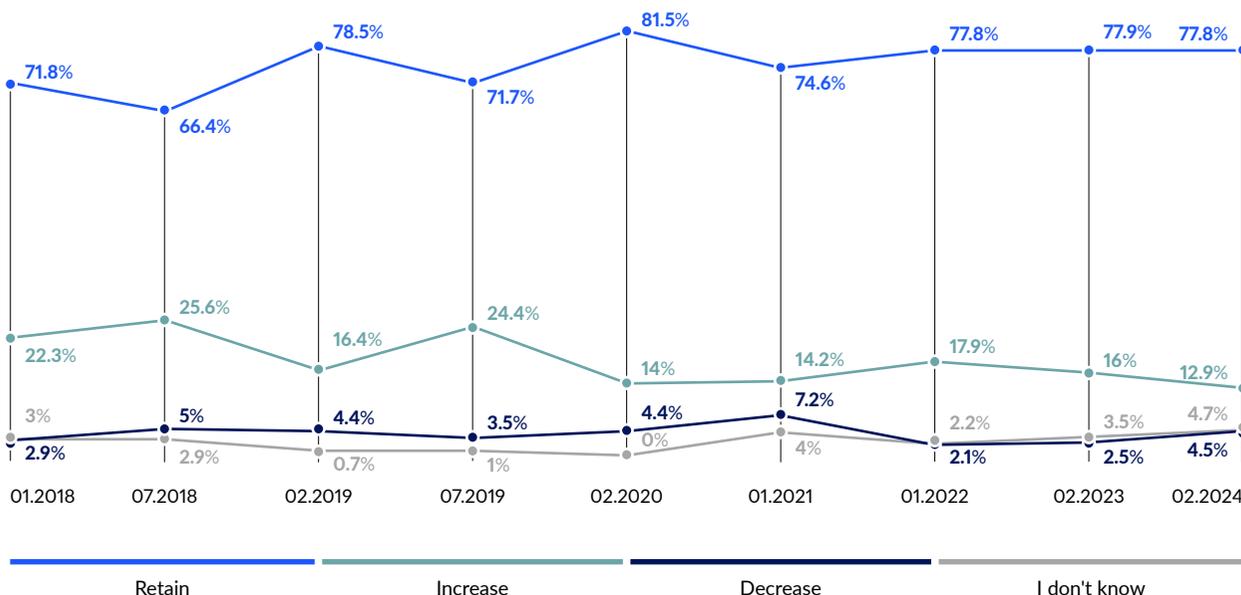
Recruitment plans

Recruitment plans of companies

Most employers are planning to retain their current employment levels (77.8% in total) – not unlike the previous year (77.9%). A large majority expects to implement these plans without hiring new employees, though we have noticed a slight decrease in the number of such declarations (57.6%, as compared to 61.4% a year earlier). On the other hand, the number of businesses hoping to retain their current employment levels by recruiting new people to replace those quitting has increased (by 3.8 p.p. y/y). These results indicate that measures aimed at reducing employee turnover will once again be of utmost importance in the HR policies of businesses.

13% of surveyed companies are planning to expand their teams, marking a 3.1 p.p. decrease since last year. At the same time, **the number of enterprises looking to reduce employment has increased slightly (to 4.5%, an increase of 2 p.p. y/y).** We are therefore observing a tendency toward cautious decision-making in recruitment, suggesting that the employers are still observing the economic situation. It also bears mentioning that in the past few years, numerous companies were forced by external circumstances to seek cost savings. As a result, processes were optimized and assets are being managed more rationally. Despite the economic circumstances improving, some of these enterprises might not want to return to previous methods and rather stick with the new cost and asset management regime.

Employment changes over years



In the upcoming quarter, are you planning to:

12.9% Increase employment

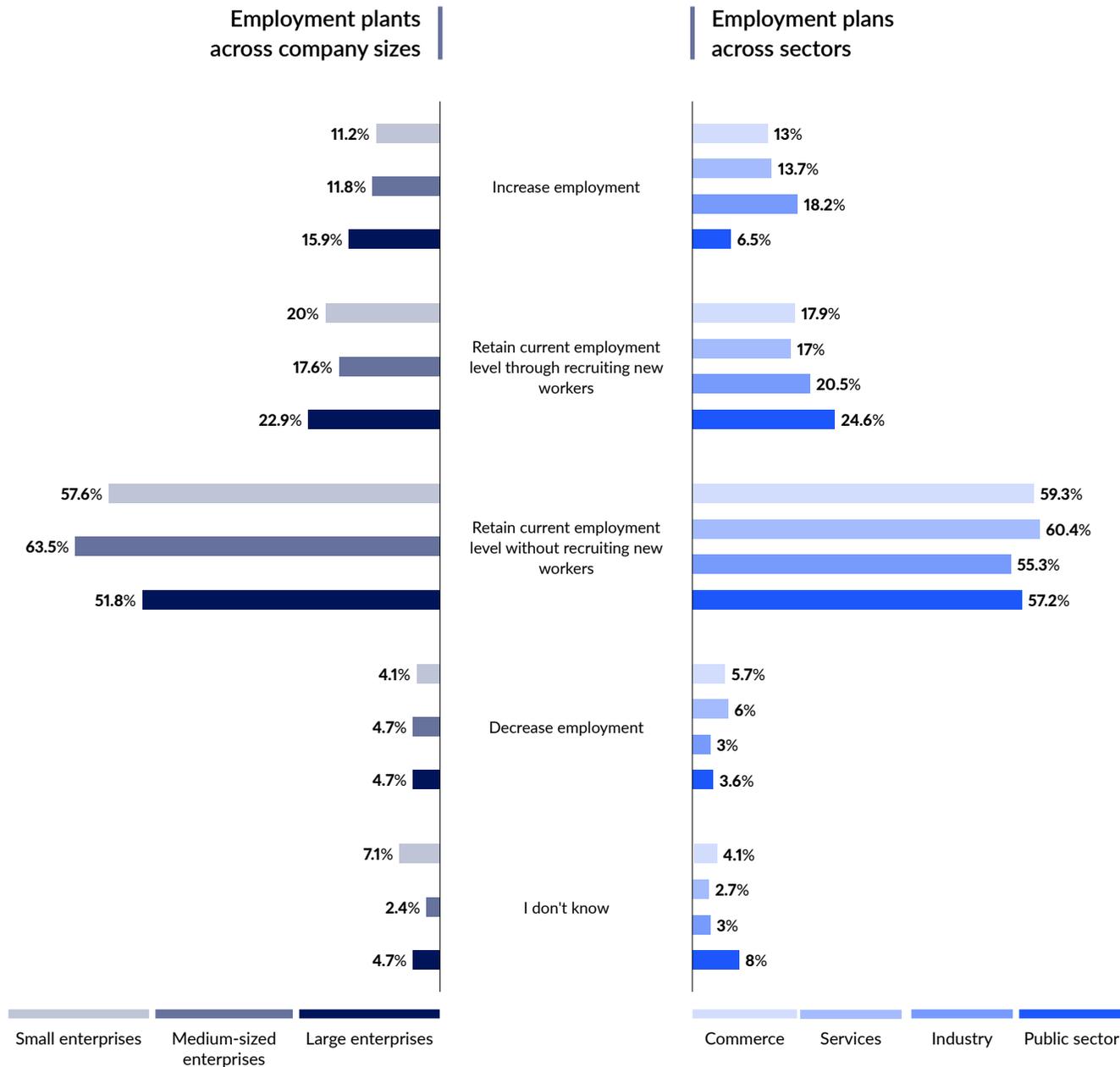
20.2% Retain current employment level through recruiting new workers

77.8% Retain current employment level without recruiting new workers

4.5% Decrease employment

4.7% I don't know

Recruitment plans of companies



Who's planning to increase employment?

The largest enterprises and the industrial sector (with an increase from 12.6% to 18.2%) are the most eager to increase employment. This is a positive development, given that they tend to herald more universal changes to the market: they're hiring when the orders are high and slowing down when the demand dies down.

Among all sectors, the most commonly implemented recruitment plan is retaining the current employment level without recruiting new employees. This strategy has been chosen primarily by mid-sized enterprises (63.5%) and less often by large ones (51.8%). However, it bears pointing out that the latter saw an increase of 9.7 p.p. as compared to the previous year.

In case of the smaller enterprises, the trends are visibly shifting. They still care about maintaining their current employment levels, but approach it through recruiting new people (+17.1 p.p. y/y), which might be caused by heavier turnover.

The willingness to expand one's teams appears weakest in the Eastern and North-Western regions. The businesses from these areas are primarily aiming to retain their current employment levels.

Whom are companies planning to hire?

What employees are you planning to recruit?

7.1%

Management staff

52.7%

Medium-ranking employees

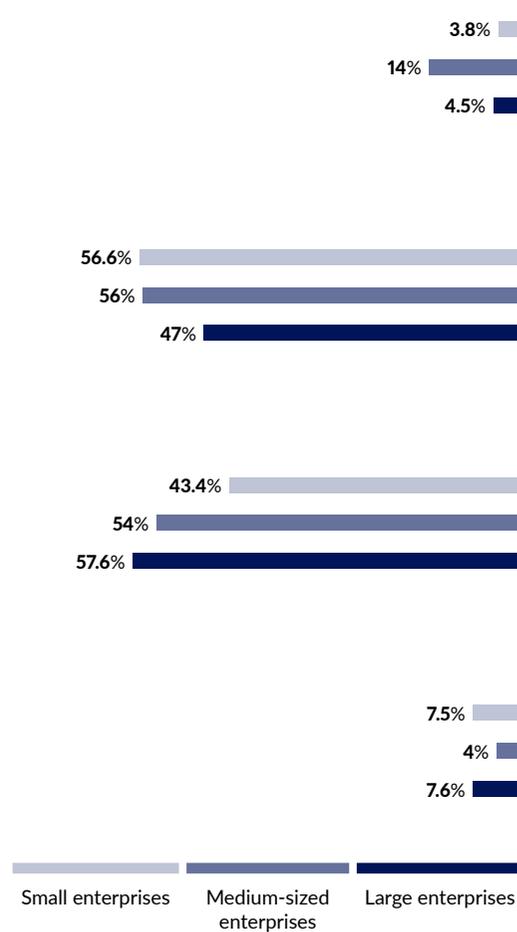
52.1%

Lower-ranking employees

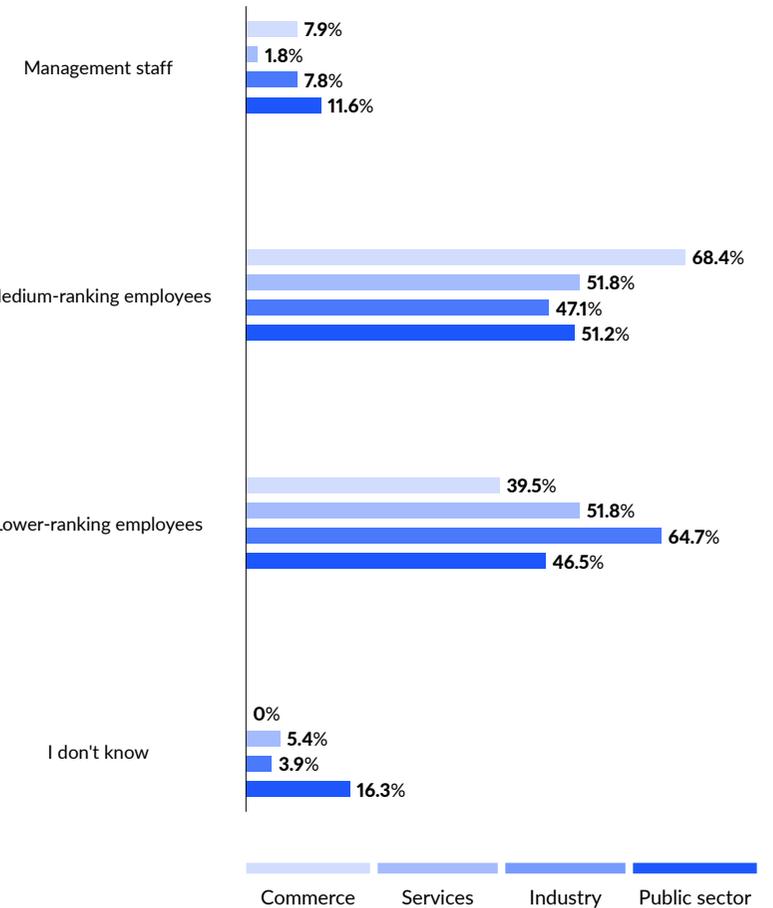
6.5%

I don't know

Employee recruitment across company sizes



Employee recruitment across sectors



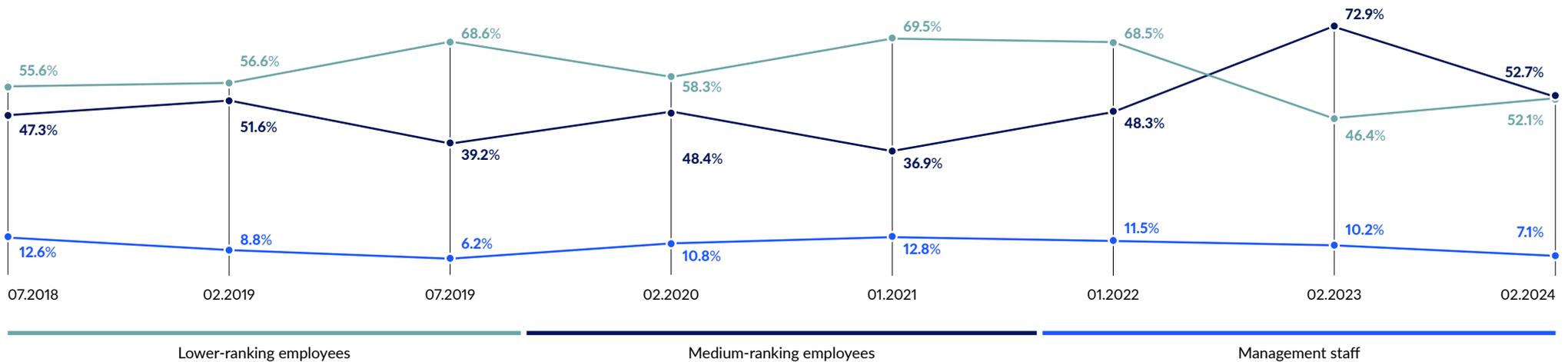
Whom are companies planning to hire?

The results of our research have shown that **the businesses are equally interested in recruiting lower-ranking (52.1%) and medium-ranking (52.7%) employees**. The increase in demand for lower-ranking employees (+5.7 p. p. y/y) is evident in medium-sized and large companies, with the industrial sector planning the most frequent recruitment for this level of positions (64.7%).

On the other hand, the number of businesses looking to hire mid-ranking workers is falling – by 20.2 p.p. year on year. However, it bears mentioning that **it's still one of the highest results in the past five years** (aside from the previous year, with its record high demand). The largest drop in such recruitments took place among the large enterprises (-31.2 p.p. y/y), but ultimately the decrease took place in all types of businesses, regardless of their size or industry. The commerce sector has the highest demand for mid-ranking employees (68.4%).

The interest in recruiting managerial staff has waned as compared to the previous years, currently at 7.1%. It concerns primarily mid-sized businesses and the public sector.

What kind of employees are being sought after - comparison across past years





Robert Lisicki

Director, Labor Department, Konfederacja Lewiatan

Ongoing uncertainty

At the beginning of 2024, we noted the moods of entrepreneurs improving, as compared to 2023. Falling inflation, unlocking of KPO funds and governmental promises to support businesses have lifted the mood and improved developmental prospects. At the same time, the current market data suggests a slight recovery of industrial production and ongoing wage pressure – in February 2023, the average wage in the private sector rose by a nominal 12.9% y/y.

The businesses remain uncertain as to the operational conditions, afraid of further increases in costs of energy or employment and the overall international situation. This causes more cautious decision-making in matters of investment, including extending employment.

It's further compounded by the issue of employee shortage, especially those with specific qualifications required by the company. This caution is confirmed by data from the latest "Labour Market Barometer". Only 12.9% of employees are considering increasing employment in the upcoming quarter. The vast majority (77.8%) aren't planning any changes in this regard. It bears mentioning the different assumptions of varied personnel policies across various sectors and company sizes. Large enterprises (15.9%) and the industrial sector (18%) are most likely to hire new employees. For comparison, the same is true of 13% of businesses in the commerce sector. Another result that bears mentioning is that only 4.5% of the respondents are planning to decrease employment. This is indicative not only of the perception of the current economic situation but also the growing employer awareness as to the difficulty of acquiring new employees, as well as the time and financial expenditures of preparing new cadres.

Employee attitude is also of interest. 26% of respondents were afraid of losing their jobs, while 55% had no such concerns. At the same time, 44.9% of employees are considering seeking a new job, with the youngest people (under 24 years of age) more willing to take such steps (57.4%) than those aged 45 or older (35.1%), for whom the stability and certainty of employment are of greater importance. These numbers are quite the food for thought. Undoubtedly, employee criteria for choosing a new workplace should be of special interest to businesses. The salary levels remain the most important (47% of respondents), with issues such as lack of promotion, growth or self-realization opportunities and workplace routine proved important for a third of the respondents.

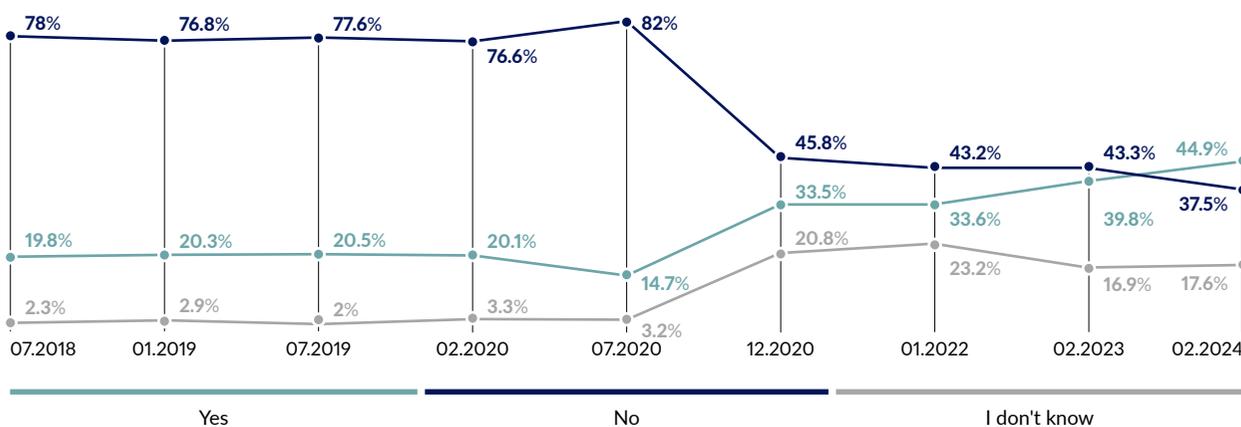
Taking into account employee expectations is key for accurately perceiving a given workplace's attractiveness and workers' loyalty. At the same time, it might decide the future and success of a company.

Employee plans to seek new jobs

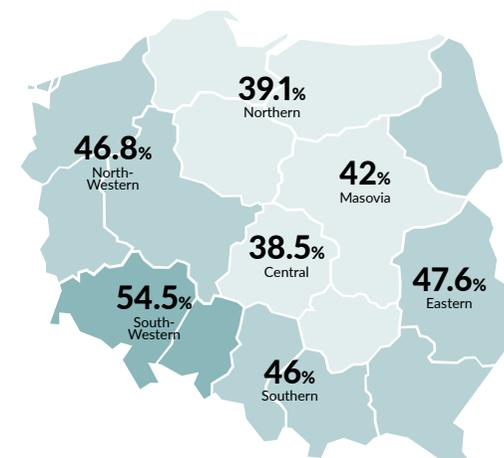
When compared to 2023, **the number of people looking to change their jobs has increased (from 39.8% to 44.9%). It's at the highest level since 2018 and the first time in this period that the number of people planning to change jobs is higher than the number of those who are not interested in doing so.** Rising trend has been noted across the entire country, except for the Central region, where last year half of our respondents had declared interest in changing their job. This year, only 38.5% said so. The interest in seeking a new workplace is strongest in the South-Western (54.5%) and Eastern regions (approx. 50%), as well as industrial and service sectors (almost 50% of the respondents), followed by commerce (48.5%). The plans to change one's job are most common among those with either the lowest or highest salaries (61% and 54.1%, respectively).

Over the past few years, **we have been seeing increased openness and activity of employees in the area of changing workplaces.** This could be caused by a generational change. The youngest employees are more willing to seek a new job that's a better fit for their needs (earnings, organizational culture, opportunities for promotion) and find it easier to leave their current employer. This year's edition of our research has shown that the percentage of people in 18-24 age group planning to find a new job has increased from 51% to 58%. People aged 25-44 are also growing more interested in a change – 54% of them have declared so, as compared to only 44% a year ago. One should also take note that the workers, especially younger ones, are just as perceptive of the market volatility as their employers and know that the age of staying in a single workplace for decades is coming to an end. Nowadays, employees must remain flexible and be able to adapt to ever-changing conditions.

Are you planning to change your current job?



Plans to change one's job across regions

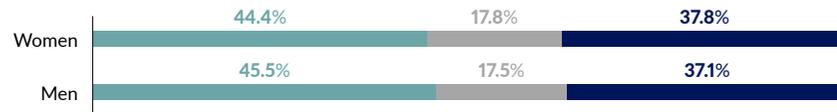


Are you planning to change your current job?

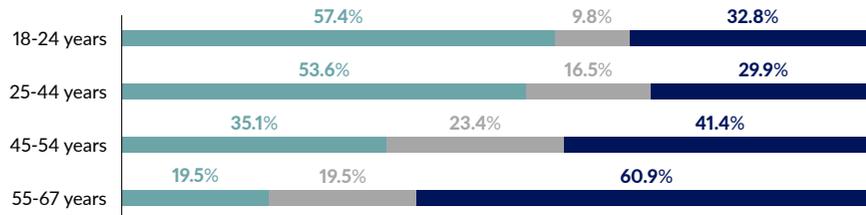


Who's planning to change their job?

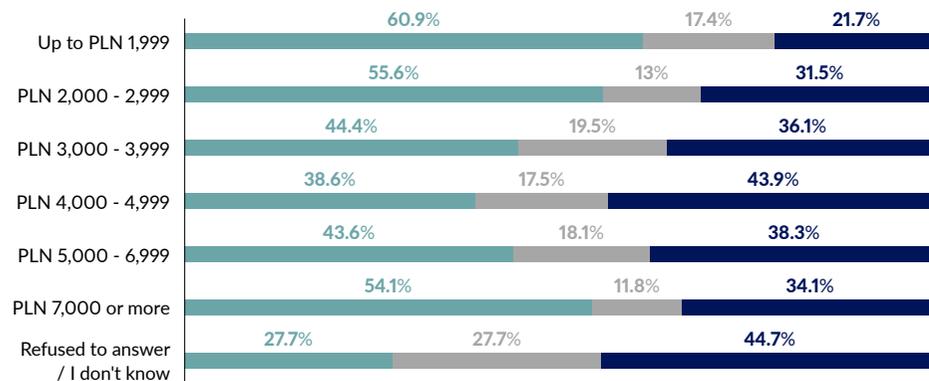
Are you planning to change your current job?



Plans to change one's job across age groups



Plans to change one's job across salary levels

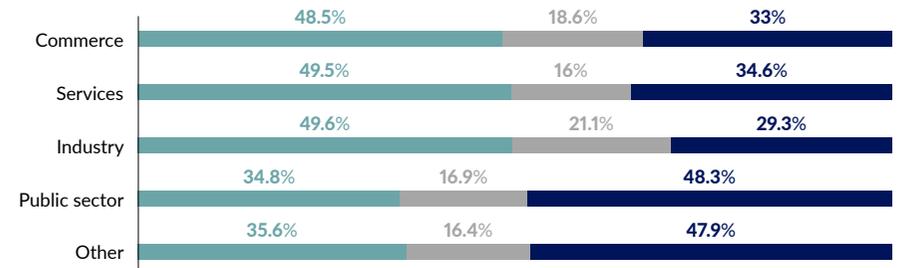


Yes

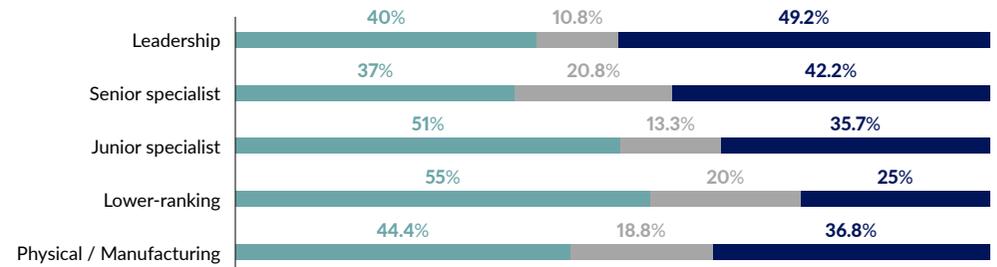
I don't know

No

Plans to change one's job across sectors



Plans to change one's job across positions

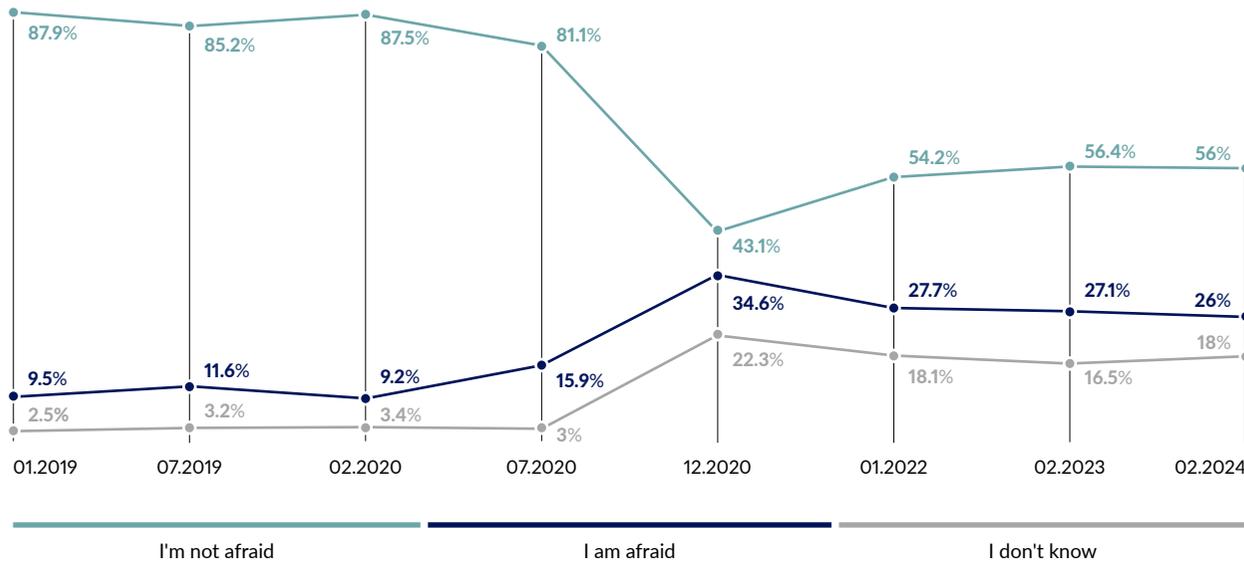


Are the employees afraid of terminations?

The employees are largely feeling secure about the stability of their employment. The results of this year's research are nearly identical to those of the past two years. 26% of our respondents were afraid of possibly losing their jobs (as compared to 27.1% a year ago) and 56% lacked such concerns (as compared to 56.4% in 2023).

Taking into account the media narratives about employee shortages, their optimism is understandable. Despite all the economic changes, the workers feel confident and believe to be favored by the current environment. Employer surveys tend to support these feelings – **most companies are not planning terminations. Quite the opposite – businesses strive to retain their current employees.**

Are you afraid of losing your job?



Are you afraid of losing your job?



Who's afraid of losing their job?

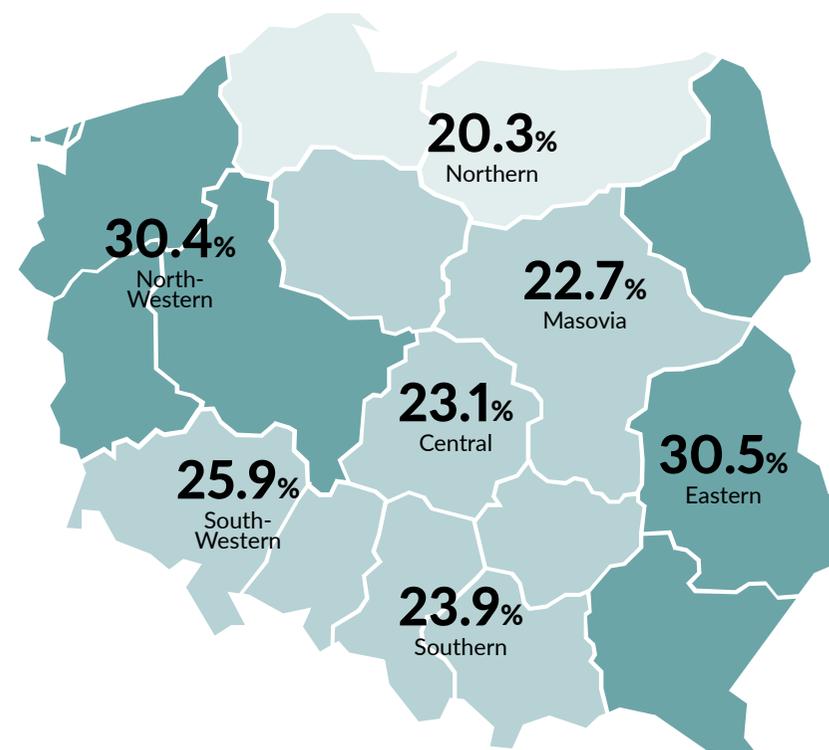
Who's afraid of losing their job?

The men tend to be more afraid for their continued employment (27.6%, an increase of 2.9 p.p. y/y). This is also true of the **youngest employees** (32.8%, as compared to 27.7% p.p. a year ago). One can observe an overall tendency for job stability to increase along with a given person's age. There's also a correlation with one's earnings – the lower one's wage, the greater their worries about termination. Almost a third of employees in the commerce and manufacturing sectors are worried about unemployment. **Public sector employees are feeling the most secure (20.2%).**

In terms of vocational groups, **junior specialists and lower-ranking workers are most afraid of losing their jobs (34.7% and 33%, respectively). Groups expressing the least concerns include the managers (21.5%), physical and manufacturing workers (24.1%).**

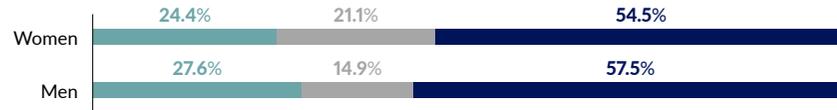
In comparison to the previous year, one could see increased confidence in job stability at the higher-ranking positions (leadership and senior specialists). However, the concerns of junior specialists have greatly increased.

Percentage of people afraid of losing their jobs across regions

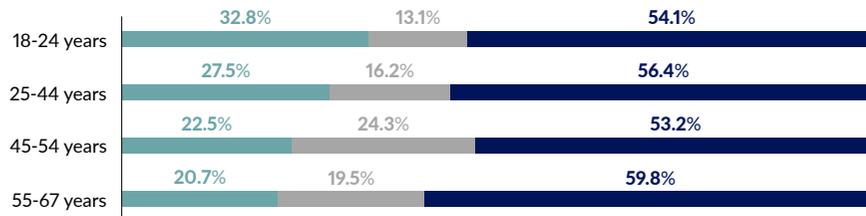


Who's afraid of losing their job?

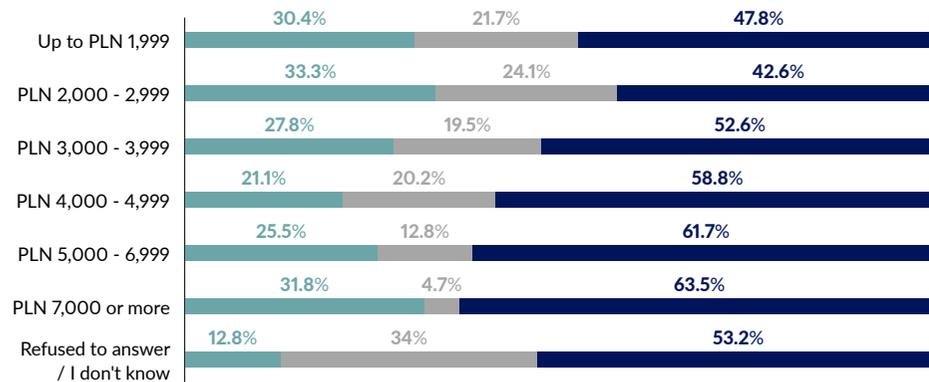
Are you afraid of losing your job?



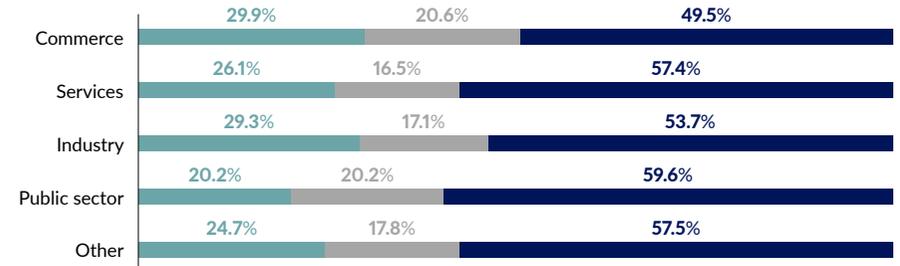
Concerns about losing one's job across age groups



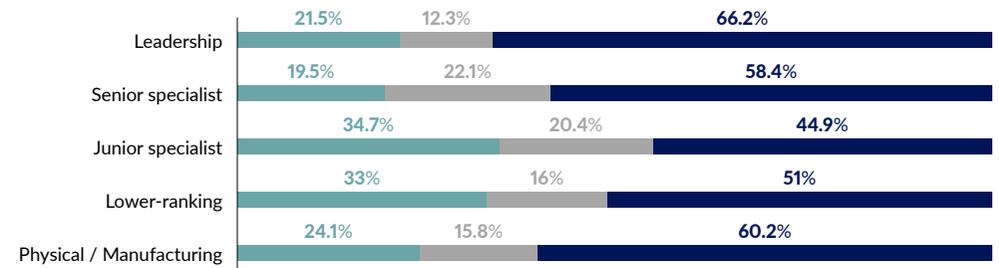
Concerns about losing one's job across salary levels



Plans to change one's job across sectors



Concerns about losing one's job across positions



Proactive stance of employees on the job market

An increasing number of people are concerned about their ongoing employment and actively seeking a new employer.

In 2023, 60.8% of all respondents declared so, while today this number is closer to 65%. This marks the highest result since 2019 and **strongly signals a more proactive stance of employees on the job market.**

A likely reason behind this trend is the worsening economic situation. Growing inflation, and therefore also living costs, are motivating people to seek more stable or better-paying jobs.

On the other hand, we're also dealing with a generational change. Generation Z is more willing to change workplace often and actively seek new opportunities.

In these circumstances, the businesses must be ready for greater turnover and the need to intensify their attempts to acquire and retain employees – and especially their most precious talent.

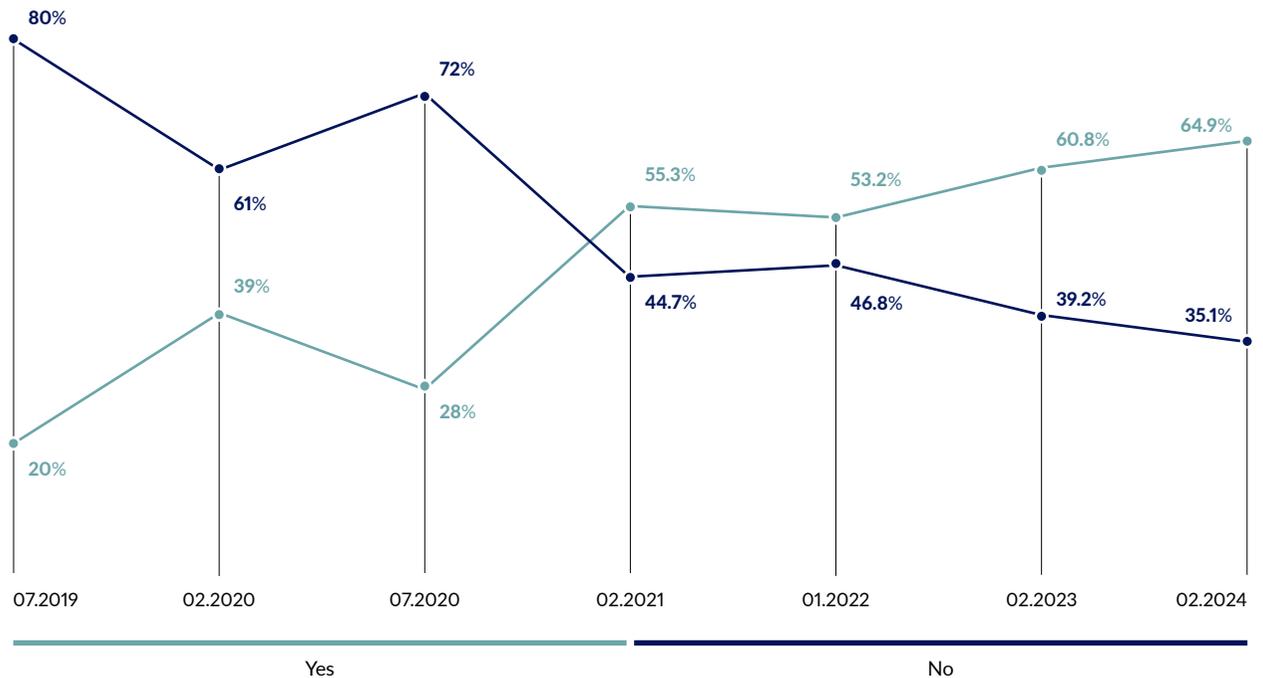
Are you currently looking for work?*

64.9%
Yes

35.1%
No

* Question answered by respondents afraid of losing their job or planning to change it.

Job seeking - comparison with previous editions of the research





Ewa Michalska

Operations Director, Grafton Recruitment

Why are employees changing their jobs increasingly often?

One can observe an increasingly proactive stance of candidates seeking new positions. This is due to several factors and will likely have long-term consequences for businesses – posing new challenges but also opening new opportunities.

In a time of uncertainty, we're looking for stable and safe work, able to not only provide satisfactory earnings but also mental comfort or work-life balance. As shown by the results of the Labour Market Barometer, excessively low pay remains the primary motivation to change one's employer (at over 50% of answers), but issues such as flexible working hours or occupational stress levels are becoming increasingly important. This marks an important change in employee behavior, especially the younger ones, a change that requires appropriate employer reaction.

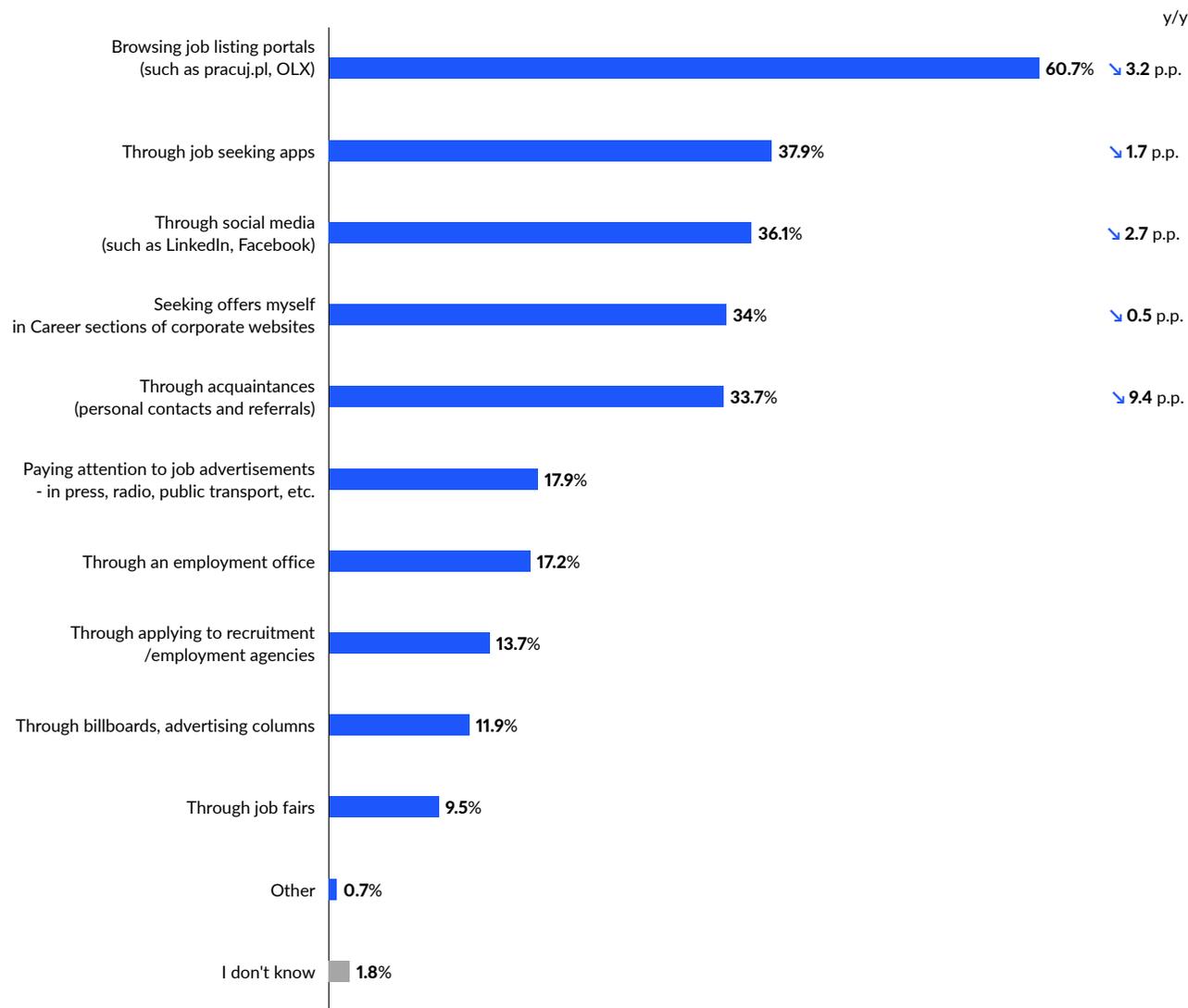
Generational changes are yet another factor impacting employee proactivity on the market. For Generations Y and Z, flexibility, independence and work-life balance are key priorities – they won't hesitate to seek an employer able to fulfill most of their expectations. It bears mentioning that the younger generations of employees are willing to step away from the traditional model of a full-time vacancy, with a fixed schedule. This causes them to become more open to non-standard forms of employment such as B2B contracts, casual jobs or additional commissions that they actively seek. However, the additional forms of employment are not only a young person's game. The growing costs of living are also convincing their older, more experienced colleagues which also contributes to the increasingly proactive stance of the candidates.

The rapid technological progress is another major motivator. Automation and digitization contribute to the changing structure of jobs, with some professions vanishing and new vocations, requiring new skills, are appearing. This causes the observed movement in the job market and the growing interest in raising one's qualifications (reskilling, upskilling). As of writing, 42% of all employees are considering changing their jobs. Among those afraid of losing their job or planning to change it, this number is as high as 71%, marking an increase of 10 p.p. year on year.

The increasingly proactive stance of candidates poses a number of challenges to companies, requiring them to adjust their HR strategies, recruitment methods and human resources management models. On the other hand, it offers a chance to acquire talented workers who up to this time tended to remain passive on the job market.

How are employees looking for work?

How are you planning to seek a new job? *



How are employees looking for work?

Browsing job listing portals remains the single most popular way of seeking a new job, despite a slight drop as compared to the previous year (60.7% as compared to 63.9%). The youngest employees (aged 18-24) are the least fond of this method (47.5%). **Jobseeking apps** (37.9%) are also fairly popular, even though they are also on a downward trend (falling from 39.6% last year).

Many are also turning toward **social media portals** such as LinkedIn or Facebook (36.1%) when looking for a new job. This is true of all age groups, though slightly less so among the oldest ones. Commerce sector employees are a bit more likely to pursue this avenue (46%).

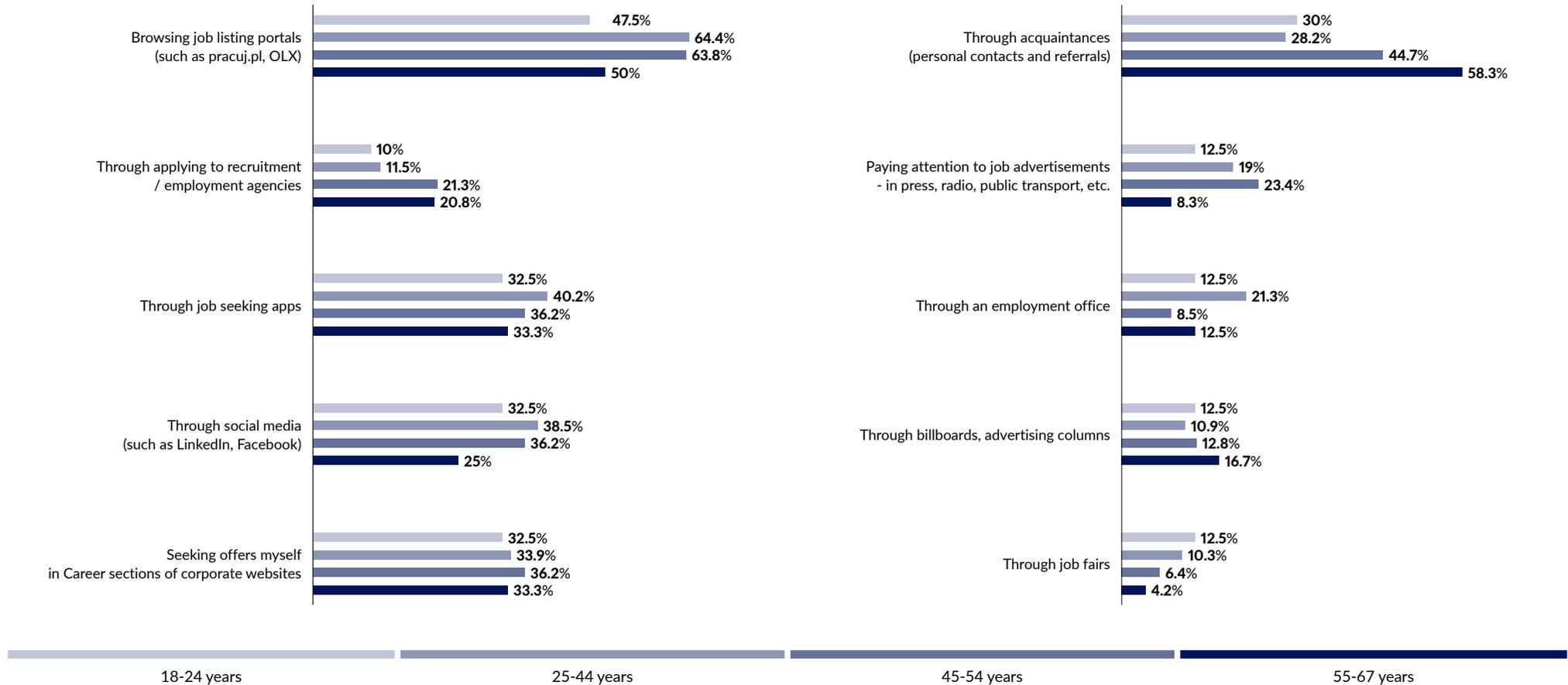
Fewer Poles are seeking employment through their acquaintances (33.7% as compared to 43.1% a year ago). This method is preferred by older workers, especially those living in the countryside and smaller towns.

Nowadays, job seeking is increasingly digital, with personal friends and traditional communication channels losing their importance as a source of information about job opportunities. One can expect this process to deepen as new generations enter the job market.

* Question answered by respondents afraid of losing their job or planning to change it. The respondents could select multiple answers.

Methods of job seeking across age groups

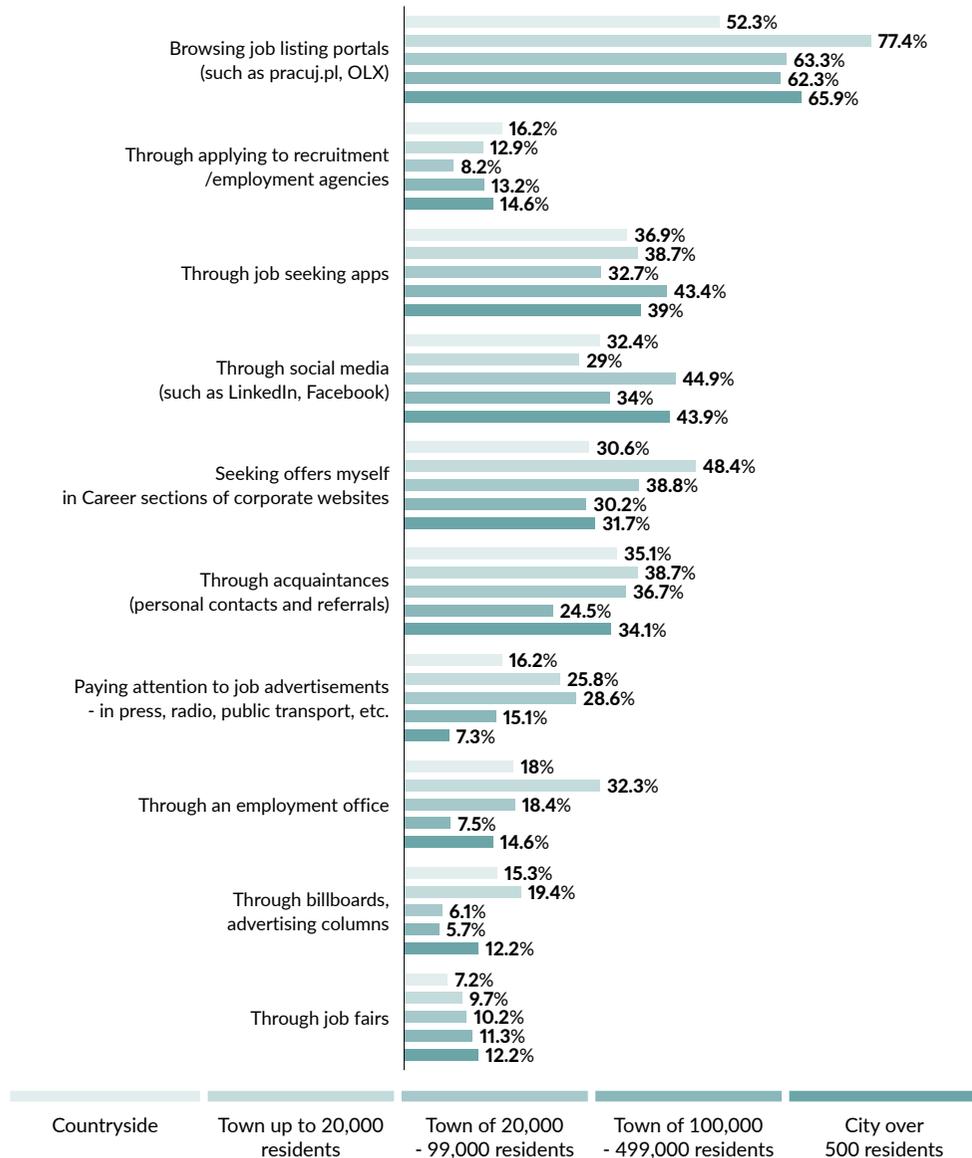
Methods of job seeking across age groups*



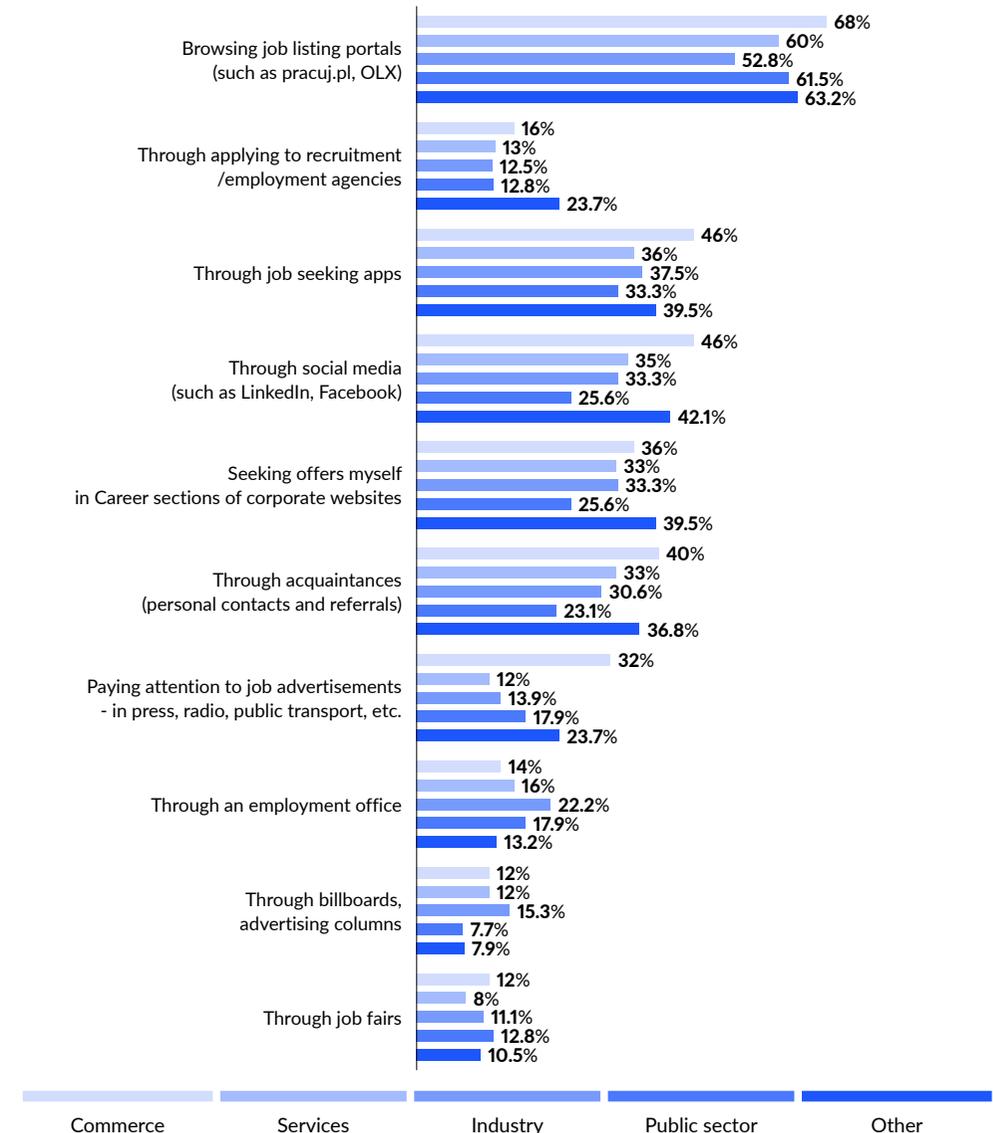
*Question answered by respondents afraid of losing their job or planning to change it. The respondents could select multiple answers.

Methods of job seeking across places of residence

Methods of job seeking across places of residence*



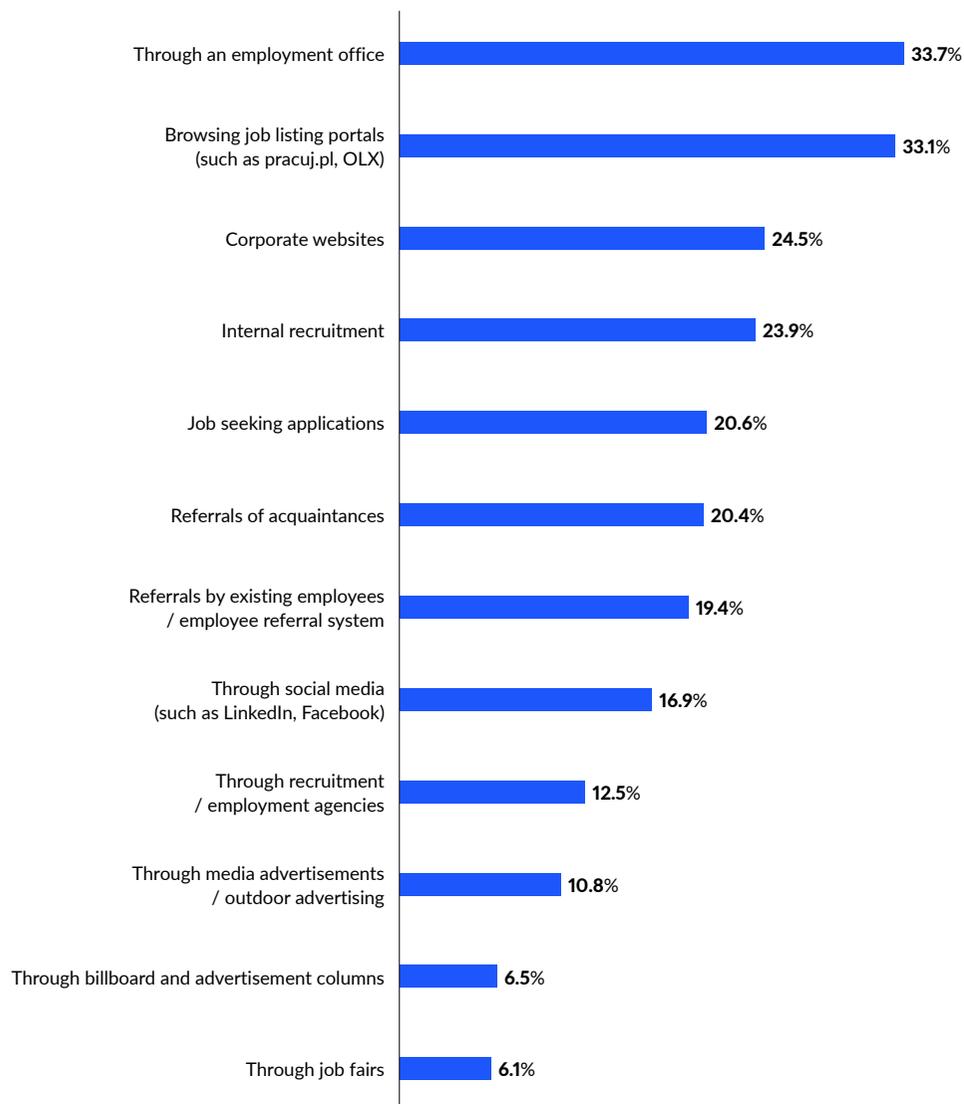
Methods of job seeking across sectors*



* Question answered by respondents afraid of losing their job or planning to change it. The respondents could select multiple answers.

Methods of seeking employees

How are you usually seeking employees?



Multiple choice question - respondents could choose up to 3 answers.

How are companies seeking employees?

The two **most popular ways of acquiring employees are – similar to the last year – the employment office (33.7%; as compared to 45.4% last year) and publishing offers on popular jobseeking portals (33.1% vs. 51.1% a year ago).** However, in both of these cases, we have seen a notable decrease since last year’s research. **Company websites are growing in importance,** with a fourth of all businesses posting information about available vacancies (24.5%). The employers are also **increasingly fond of job seeking applications** (20.6% - an increase of 12.4 p.p., from 8.2%) and the **services of recruitment agencies** (increasing from 7.6% last year to 12.5%).

We noticed a greater diversity of candidate acquisition channels as compared to last year, possibly indicating growing difficulties in attracting employees. This might be due to rising employee expectations – especially financial ones – which have become harder to satisfy in the current market conditions. This might be due to rising employee expectations – especially financial ones – which have become harder to satisfy in the current market conditions.

The businesses are adopting different recruitment strategies depending on their size and industry. Large enterprises prefer utilizing jobseeking portals (34.7%), internal recruitment (30%), recruitment agencies (17%) and media advertisement (16%). Small and medium-sized enterprises are much more likely to turn toward employment offices (40.6%) and online portals (32.4%).

Similarly, the industrial sector prefers employment offices (38.6%) and online portals (36.4%). It is also utilizing jobseeking applications (26.5%). Commerce and services sectors prefer online classifieds and employment offices. The public sector advertises primarily in employment offices (39.1%) and on company websites (30.4%).

Recruitment methods - how are companies and candidates connecting?

Despite a slight drop in interest in **job listing portals**, they remain an important tool in the recruitment process for both employees and employers. Their popularity among businesses is largely due to their wide reach and effectiveness in reaching potential candidates. For the employees, they provide access to many offers in a single place and a convenient application process. From the employer perspective, the disadvantages of these websites include the costs of publishing the offers, which might prove quite high for large businesses running numerous recruitment campaigns.

Recruitment through **job seeking apps** provides both sides a similar value, but their reach tends to be smaller. However, it seems that the employers – unlike employees – aren't fully on board with this tool.

Social media, while popular among employees, might prove a challenge for businesses, especially smaller companies without active profiles or necessary skills to facilitate successful recruitment there. Another challenge lies in the small reach of published offers if they're not supported by marketing campaigns. These in turn lead to additional costs, for both publishing and management. Another challenge lies in the small reach of published offers if they're not supported by marketing campaigns. These in turn lead to additional costs, for both publishing and management.

Corporate websites are an interesting recruitment tool, utilized by both employers and employees. As an alternative to other digital channels, they provide businesses **an opportunity to present the organization and its culture**. Their disadvantage is the limited reach of the offers, especially if the website's positioning is lacking. The candidates often have to find it by themselves – but on the other hand, **this increases the chance of receiving higher quality applications** from people genuinely interested in working for a specific company. Of course, the offers published on one's own website can be supplemented by paid search engine campaigns or improving the website's positioning, but these avenues obviously come with additional costs.

It bears mentioning the **continued interest in acquiring candidates through the employment office**. While the employers can expect support in more matters than candidate search – for example, various employment subsidies, especially concerning certain candidate groups (e.g. people aged 50+, people with disabilities, lacking qualifications, etc.) – **given the low unemployment rate, the candidate pool reachable through this approach is smaller**. The employees themselves rarely declare seeking work through employment offices. This avenue is chosen primarily by the residents of smaller towns and the countryside, as well as people aged 25-44, especially in the industrial sector (21.3%). The effectiveness of recruitment using this method depends on numerous factors, including the specificity of a given position, the company's location or the candidate's profile. Employment offices are likely a candidate source useful primarily for simpler tasks and internships.



CHAPTER 3

Recruitment difficulties

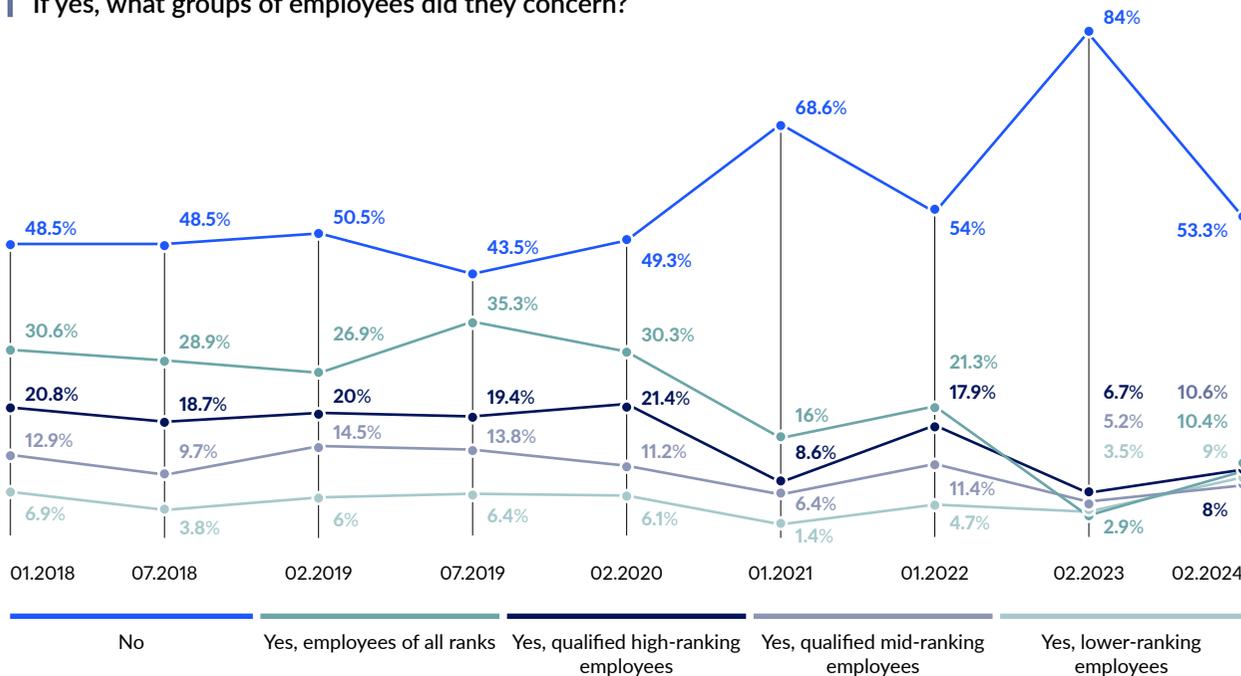
Employee shortage from the employer perspective

More than half of the businesses we surveyed this year did not report any troubles in acquiring employees over the past few months. This marked a return to 2022 levels, slightly exceeding those from before the pandemic. Last year's spike – with as many as 84% of businesses reporting no trouble with attracting talent – was likely caused by new recruitments being largely put on hold due to the uncertain economic situation. This year's change might be signaling that the situation is slowly returning to normal. Despite that, the number of businesses declaring troubles with acquiring new employees of various ranks remains much lower than in the previous years.

Most of the declared issues concern attracting qualified workers for medium-ranking positions (10.6%), even though the numbers for low and high-ranking positions are fairly similar.

Lack of appropriate candidates has been reported primarily by large organizations (likely due to the larger scale recruitment) and the industrial sector. In their case, the issues largely concern attracting low and mid-ranking employees.

Has your company faced recruitment difficulties in the past few months? If yes, what groups of employees did they concern?



Respondents could select multiple answers.

Has your company faced recruitment difficulties in the past few months? If yes, what groups of employees did they concern?*

53.3% No

10.4% Yes, employees of all ranks

8% Yes, qualified high-ranking employees

10.6% Yes, qualified mid-ranking employees

9% Yes, lower-ranking employees

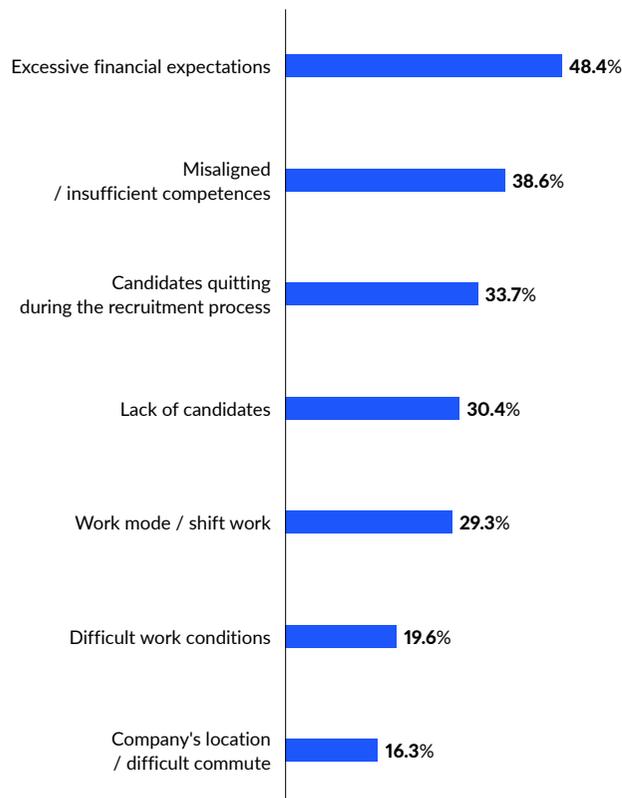
10.6% Hard to say

*Respondents could select multiple answers.

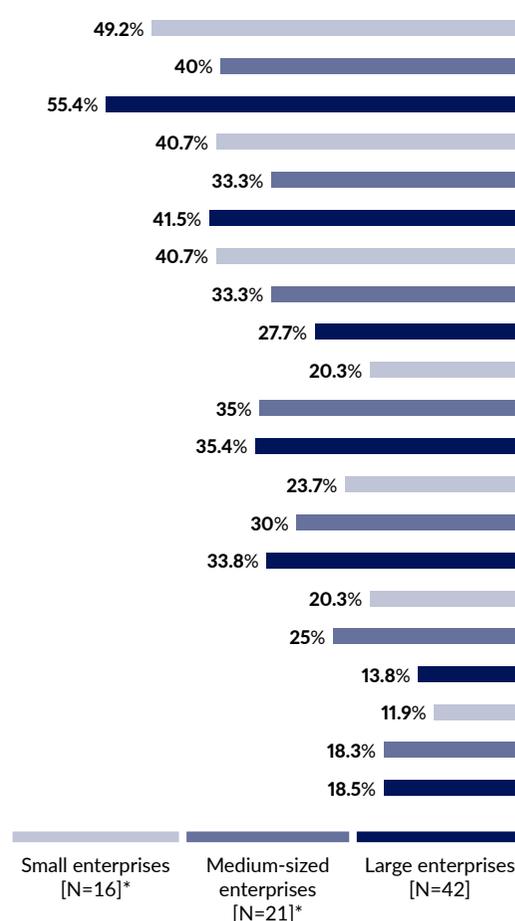
Causes of recruitment difficulties

The businesses declaring difficulties with acquiring employees are pointing out several key reasons for that. **Usually, it is due to excessive financial expectations of the candidates** (48.4% as compared to 25.3% year on year). This issue has been especially visible in the commerce and services sectors. **The lack of available candidates**, which concerned over 74% of businesses last year was only pointed out by 30% this time, primarily by public sector businesses and small and medium-sized enterprises who find the recruitment to be more challenging due to greater recruitment volumes. **Complaints about mismatched candidate competencies have increased since the last year** (38.6% as compared to 32.9% y/y). Another issue growing in prominence is the **work mode/ shift work** (almost 30% vs 1.3% y/y) and **candidates leaving mid-recruitment** (an increase by 24.8 p.p., from under 9% to almost 34%).

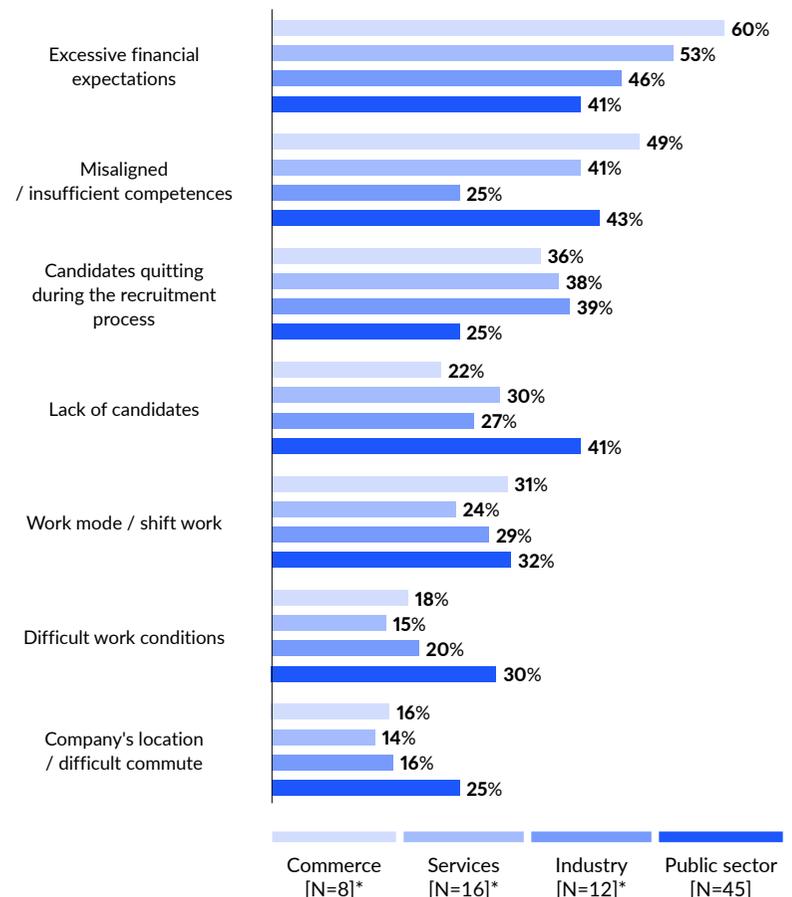
What are the key reasons behind the recruitment difficulties? Choose up to three answers.



Recruitment difficulties across company sizes



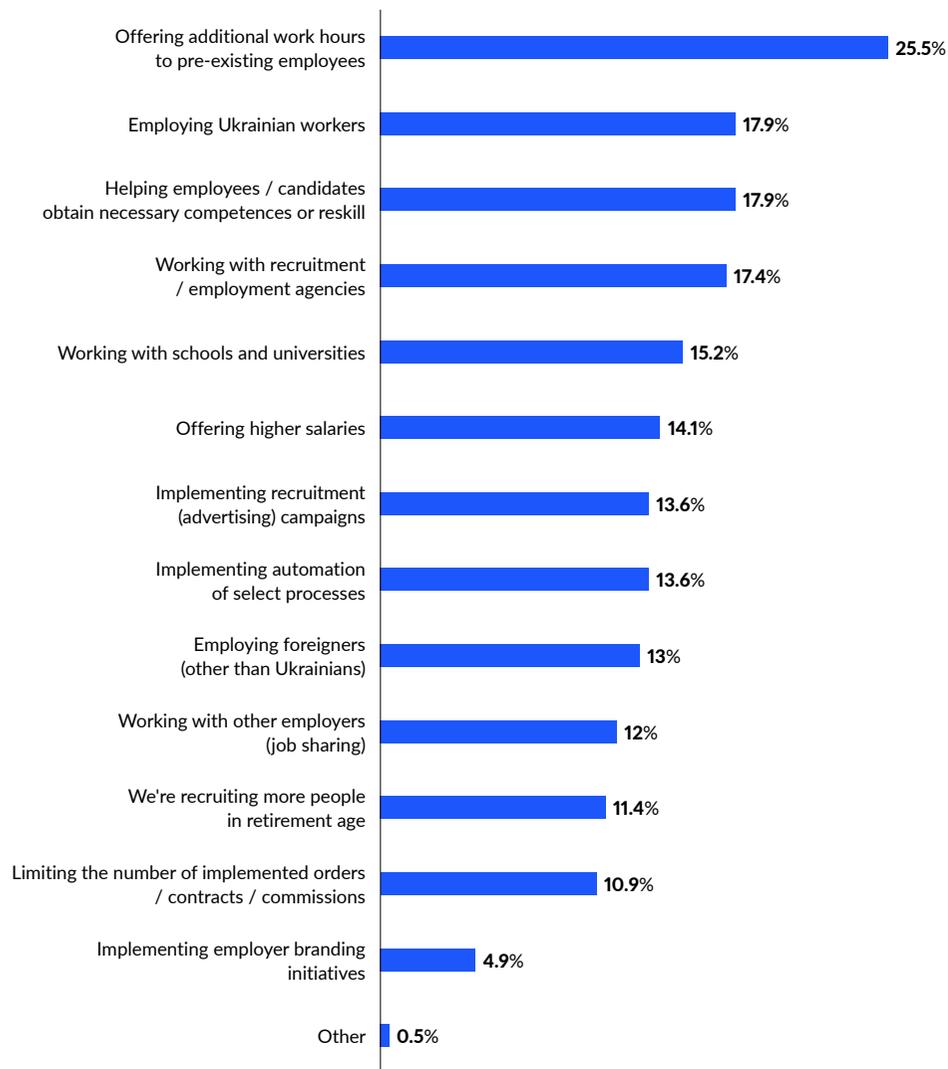
Recruitment difficulties across sectors



The respondents could select up to 3 answers. • N=184
 Questions were answered by companies facing difficulties with acquiring employees

How are companies approaching recruitment difficulties and employee shortages?

How are companies approaching recruitment difficulties and employee shortages?



How are companies approaching recruitment difficulties?

Compared to the previous year, we have seen a **distinct shift in strategy towards recruitment difficulties. offering higher salaries – which up to this point was the most popular solution – only placed sixth this time** (14.1%). This approach is preferred primarily by the largest organizations (18.5%).

Currently, **the most popular method of tackling recruitment difficulties is offering additional work hours to current teams** (25.5%. Last year, this was true of almost 33% of businesses, although the survey had a fairly low sample). The employers are also choosing to **employ foreigners**, especially Ukrainians (17.9%).

A notably larger number of companies are **helping their employees in upskilling and reskilling initiatives** (17.9% again, as compared to only 6.3% last year). Utilizing recruitment agencies has also increased in importance (17.4%, up from 3.8%).

The preferred strategies differ between various sectors. The industrial sector focused on employing foreigners, from both Ukraine and different states. It's also likely to offer additional hours to its employees (35.7%). On the other hand, it's less likely to support the employees in obtaining new qualifications, with only 12.5% of companies investing in upskilling and reskilling initiatives, while the same can be said about, respectively, 24.2% and 27.3% of services and public sector businesses. The public sector is also leading in terms of working with schools and universities (27.3%) and, much like the industrial sector, encourages its employees to take on additional work hours (31.8%).

The increased interest in the various solutions signals that **employers are moving away from competing primarily with salaries**. Presumably, many of them have already reached their limits with further pay rises hurting their profitability. The change is also a signal that the businesses are struggling to attract the right candidates, which might indicate an economic recovery and increased demand for workers.



CHAPTER 4

Counteracting employee shortages - employing foreigners

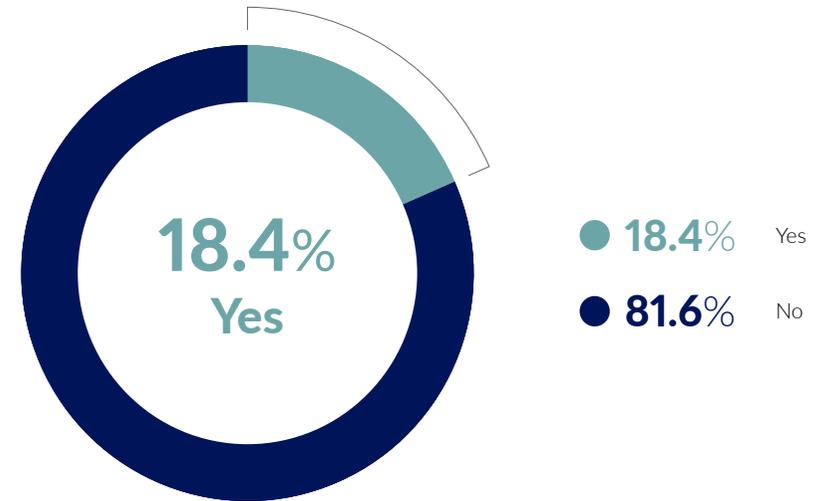
Is hiring foreigners the answer to employee shortages?

When compared to the past year, **the number of businesses employing foreigners has fallen. Currently, 18.4% of them declare employing foreign workers**, as compared to 29.9% a year before. The largest drop occurred in large enterprises (from 41.5% to 26.5%). The falling number of foreign workers is particularly noticeable in the public sector (a decrease of 24 p.p., from 38.8% to 13.8%) and commerce (a drop of 10.9 p.p., from 23.9% to 13%).

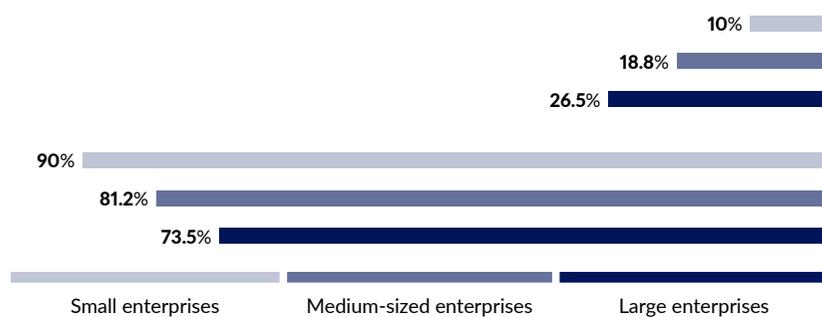
The reasons behind this include many Ukrainian workers leaving Poland's job market, caused by returns to their homeland and relocation to Western countries. One also ought to mention the growing expectations as to the terms and nature of work, causing the Ukrainians to become less attractive candidates. So far, no other nation subject to simplified procedures (Georgians, Moldavians, Armenians, Belarusians and Russians) was able to replace Ukrainians in Polish job market. Employees from overseas countries have an even lower chance of doing so, due to complicated and prolonged recruitment processes.

Another major reason for the falling number of employed foreigners is the overall state of the economy. The slowdown has caused a reduced demand and some regions saw an increased number of available Polish candidates, due to fewer orders and terminations. At the same time, companies were more cautious when making recruitment decisions.

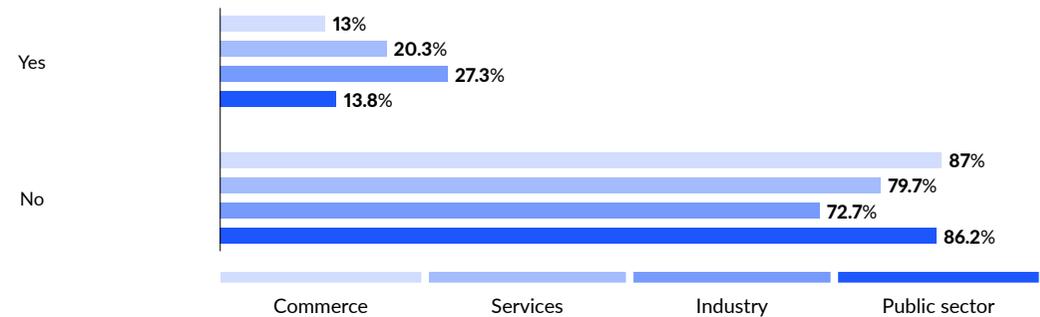
Does your company employ foreigners?



Employing foreigners across company sizes



Employing foreigners across sectors

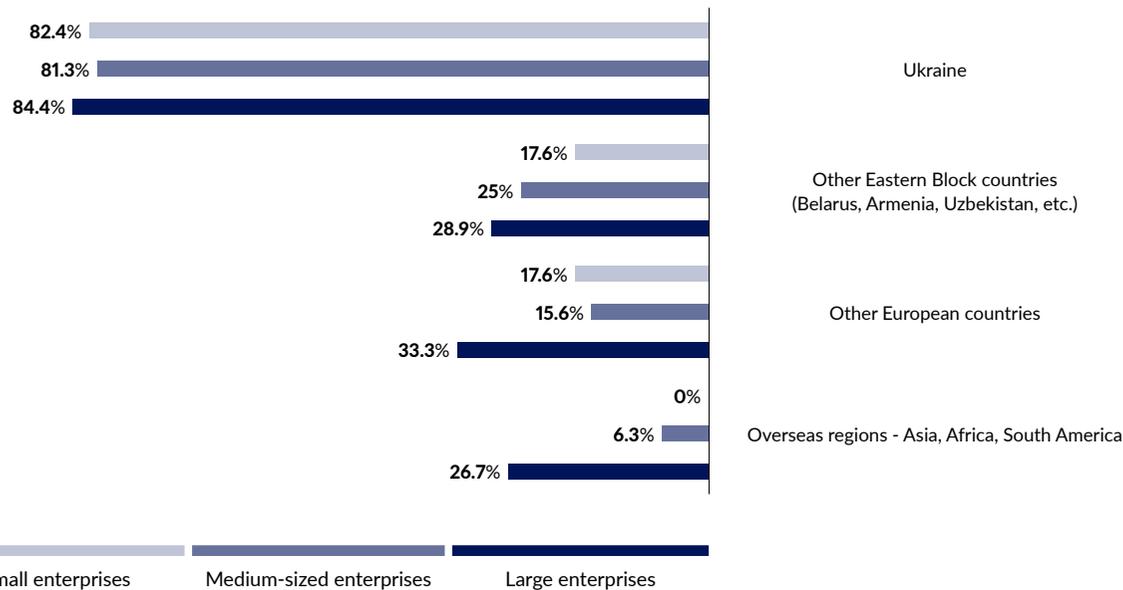


Origin of foreigners working in Polish companies

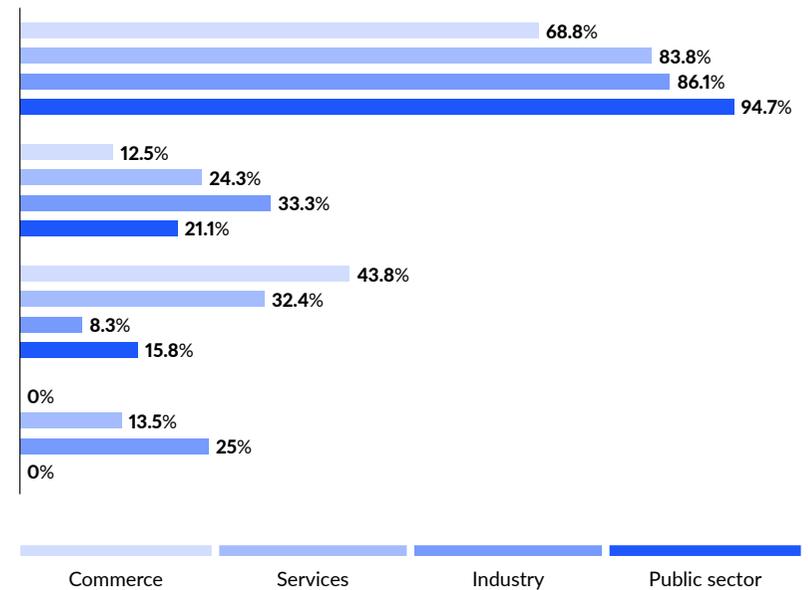
Among the foreigners working in Polish companies, **Ukrainians still predominate, although their number has fallen slightly since last year.** Ukrainian citizens are employed by 83% of companies employing foreigners. A year ago, this number amounted to almost 89%. The number of workers from other Eastern Block states is also falling (from 33.3% to 25.5%). On the other hand, **the number of employees from other European states and overseas areas such as Africa or Asia is growing.** The increase in the number of overseas workers is particularly strong, going from 5.9% to 14.9% (a growth of 9 p.p.). The businesses are twice as likely to reach out to these regions.

People from such faraway states are finding employment primarily in the largest enterprises (26.7%). These are primarily industrial (25%) and service sector (13.5%) companies.

Origins of employed foreigners across company sizes



Origins of employed foreigners across sectors



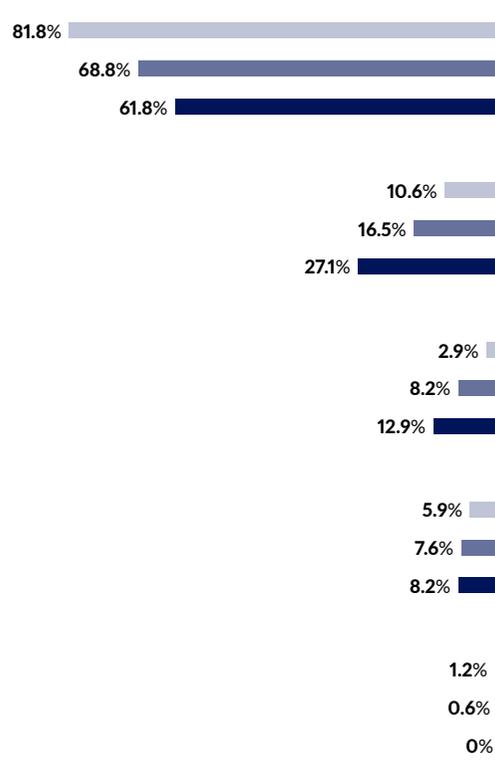
The respondents could select multiple answers. • Questions were answered by companies employing foreigners.

Employing foreigners - company plans

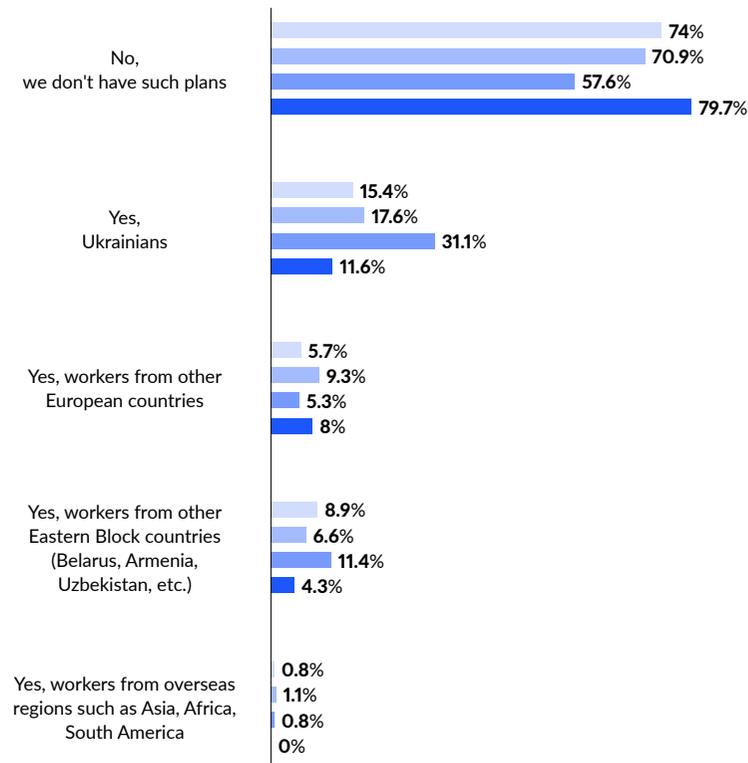
Over 70% of companies don't expect to employ foreigners in the coming year. Among those that do, 18% plan to hire Ukrainians. Only 0.6% of businesses will recruit people from more faraway places. Most of the companies looking to employ foreigners are located in Masovia and the Central region. The interest is lowest among Eastern, Northern and North-Western businesses.

Industry is the primary sector planning to hire foreigners, from both Ukraine and other countries of the former Eastern Block. Large companies are more likely to hold such plans. Among the smallest companies, as many as 81.8% are not interested in employing foreigners.

Foreigner recruitment plans across company sizes



Foreigner recruitment plans across sectors



Are you planning to employ foreigners within the upcoming year?



Small enterprises Medium-sized enterprises Large enterprises

Commerce Services Industry Public sector

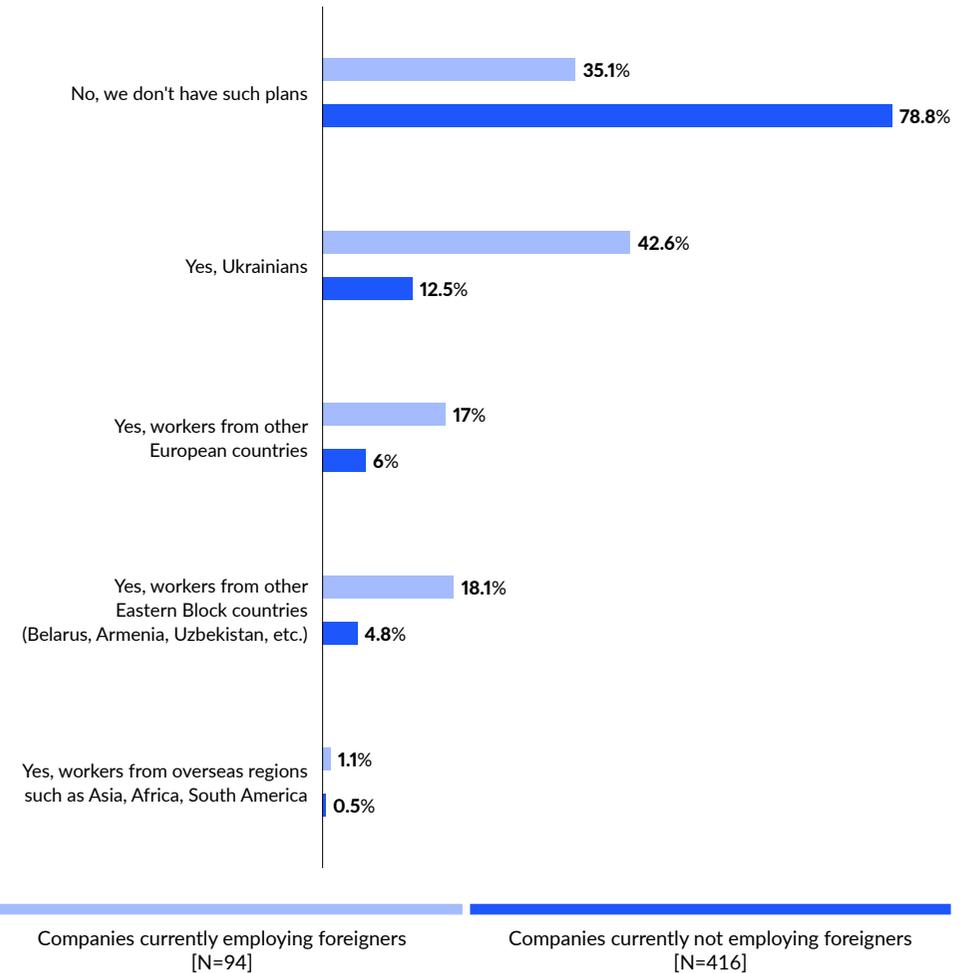
Employing foreigners - company plans

It bears pointing out that **the businesses already employing foreigners are much more likely to employ new ones in the upcoming year**. The difference is stark: among those only employing Poles, almost 79% don't plan to hire foreigners this year, while among those with pre-existing foreign employees, the same can only be said about 35%.

This difference shows that positive experiences with employing foreigners are enticing businesses to keep utilizing this opportunity.

Presumably, organizations with pre-existing foreign staff are more aware of the benefits arising from their employment and find it easier to overcome the barriers related to this process. Knowledge of related legislation, overcoming stereotypes and working out integrational activities are all helpful in tackling the cultural challenges and communication barriers.

Are you planning to employ foreigners within the upcoming year?



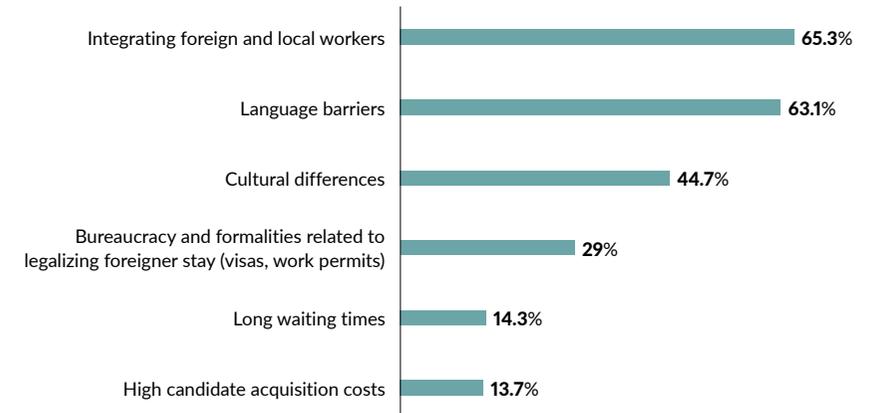
Difficulties with employing foreigners

Employing foreigners comes with several challenges. According to our respondents, **the most severe difficulties concern integrating foreigners with Polish teams (65.3%), language barriers (63.1%) and cultural differences (44.7%). Bureaucracy and formalities related to legalizing their work and stay are a smaller issue (29%), as is the extended waiting time (14.3%) or high recruitment costs (13.7%).** Importantly, the perception of these challenges is consistent between companies, both those already employing foreigners and those who don't. The latter were slightly more afraid of language barriers and cultural differences. On the other hand, those with actual experience with foreign workers were more likely to point toward formalities, waiting times and recruitment costs.

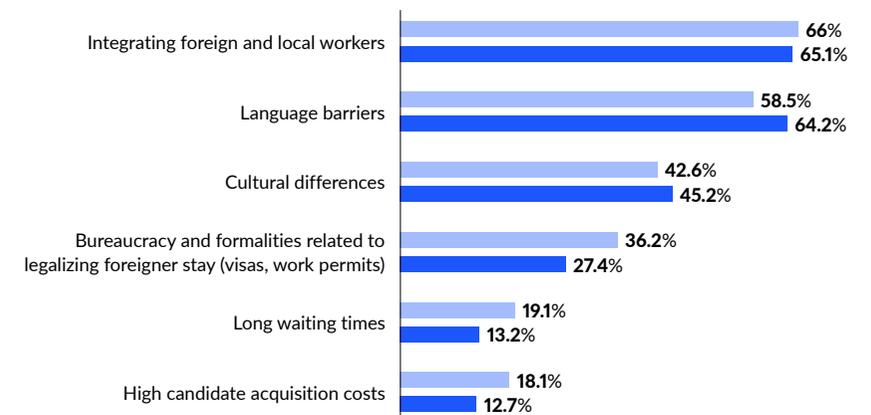
The impact of these obstacles varies between sectors. According to our research, the **difficulties with integrating the workers are felt most keenly in the industrial and public sectors.** On the other hand, commerce businesses are least likely to point towards that, which might be due to their more diverse workplace environment and openness for employees from different cultures.

Language barriers are most **troublesome for commerce and service businesses**, where direct contact with the customers is crucial. They're less pronounced in the industrial sector, where the specificity of work makes language issues less important, especially since it's viable to utilize translators. **Cultural differences** are felt most keenly in the **industrial and commerce sectors**, where team sizes can lead to more misunderstandings and conflicts over differing values, customs and modes of work. **Bureaucracy and formalities** are the primary **challenges for the public sector**, where legislative procedures for many positions can prove more complex. The industrial sector is handling this best, likely due to having more experience with recruiting foreigners. **Long waiting times** are a **major issue** for commerce, where high turnover and seasonality necessitate shorter recruitment processes. It's much less important in the public sector, which tends to utilize more long-term planning in the recruitment processes. **High acquisition costs** of foreign workers are **most troublesome for the industrial sector**, where such recruitment comes with additional expenses such as transport and lodging. The public sector was the least likely to single out this aspect.

What do you consider to be the greatest challenge in recruiting foreigners?



What do you consider to be the greatest challenge in recruiting foreigners?



Companies currently employing foreigners
[N=94]

Companies currently not employing foreigners
[N=416]



Maciej Pełka

International Recruitment Project Manager, Acting Recruitment Director, Gi Group

Challenges and solutions related to employing overseas employees

Employing people from so-called overseas countries certainly poses a number of challenges for employers, such as language barriers, cultural differences and vocational or social integration. If the employees can't speak Polish or English, communicating with them might be difficult. Many employers are well-prepared for hiring Ukrainian and Russian speakers, but other languages might require hiring an interpreter or organizing additional language courses, as well as translating the necessary employee and workplace safety documentation.

Knowing the local regulations on hiring foreigners is incredibly important – for both employers and employees. One should also pay attention to informing the candidates about any internal regulations or principles of coexistence in the lodging place and ensuring they're being respected.

Managing a multicultural team can be a great challenge, requiring well-developed cultural awareness. For people from different cultures, and of different religions and opinions, integration with the local community – ensuring acceptance and a sense of belonging – is just as important as the organization of the work environment. Support of a work agency or the employer in their everyday lives can prove key to their success, professional satisfaction and sense of security.

It's also clear that in the current circumstances, the highly bureaucratic and time-intensive visa process can be troublesome. For some businesses, it can prove an insurmountable obstacle. Employers cognizant of the fact that waiting times for Asian or African workers can last up to several months are unable to appraise their demand so far ahead. As a result, they steer away from the challenges of recruiting from overseas countries, sticking to familiar sources such as Ukraine or Belarus.

I can see a number of solutions to speed up the visa processes and legalizing foreign stay, however, they all require systemic action. Implementing or improving online application systems for visas, residence permits or identifying and eliminating unnecessary steps in the application process could help reduce the waiting times and the amount of bureaucracy. More effective processing of visa applications can be achieved by training and increasing the human resources responsible for the process. It's also important to provide clear, understandable information about the application process, as well as provide operational support for the applicants. Finally, renegotiating international visa agreements could help reduce the necessary requirements and simplify the procedures for the residents of signatory countries.

Regrettably, the employers have little influence over such changes. However, they can be active in various associations, joining together to negotiate with the government, bring attention to the issue of slow visa processes and hasten the necessary procedural changes. Employing overseas employees is an opportunity to drive Poland's economic growth and innovation. Introducing appropriate systemic solutions could simplify this process and bring benefits to all interested parties.



Mateusz Karolak, PhD

Acting Director of the Department of the Sociology of Economy and Labor at the University of Wrocław Sociology Department

Mutual openness and shared language as fundamental aspects of integrating foreigners

Difficulties with employing foreigners mentioned by the employers – such as integration with teams, communication and cultural differences – are, paradoxically, proving that employing them has become a fixture of operating a business in Poland. Thanks to the simpler, repetitive procedures, oftentimes handled by external companies, it is no longer a major issue. However, learning to integrate both sides requires a greater effort and takes up more time.

Undoubtedly, the growing percentage of workers from faraway places and cultures is largely due to the rising attractiveness of Poland's job market, increased openness of employers, but also the direct consequences of Russia's full-scale invasion on Ukraine and the ensuing ban on leaving the country by men in a recruiting age (18-60 years old).

According to the results of our international ENDURE and LYMAS projects, foreigners employed in Poland often struggle with culture shock and language barriers, as well as – regrettably – having to deal with discrimination and racism. Foreign workers are also complaining about the slow work of authorities and the lack of clear rules in the workplace.

In the context of the analyzed issue, fluency in Polish is proving key. The researchers agree that a shared language is among the key foundations of integration. This is why providing the migrants – regardless of their professional position – with the opportunity to learn Polish. It should be a systemic solution, supported by the state and employers and available to all foreigners, regardless of their declared migration plans. This will bring benefits not only to the businesses and workers but also the society at large, since – as proven by experiences of other countries – a large part of the foreign workers tend to stay in the new country for good, regardless of their claims of wanting to return or migrate further.

It also bears remembering that integration and intercultural communication are complex processes necessitating the readiness and openness of all involved parties. Therefore, businesses should place more focus on integrating the entire team and not merely including foreigners. However, according to this year's Barometer, only 20% of businesses employing foreigners have declared offering trainings on communication skills and cultural barriers; integrational events are proposed by a slightly higher number of them at 25%. At the same time, 41.5% of employees believe that such trainings and events are necessary (33.8%). Intercultural mediators are a fairly new profession in Poland, yet one that could greatly help fill this gap.

Given appropriate trust, foreigners who work at a given company might become valued intermediaries helping new recruits integrate and learn the internal culture of an organization.

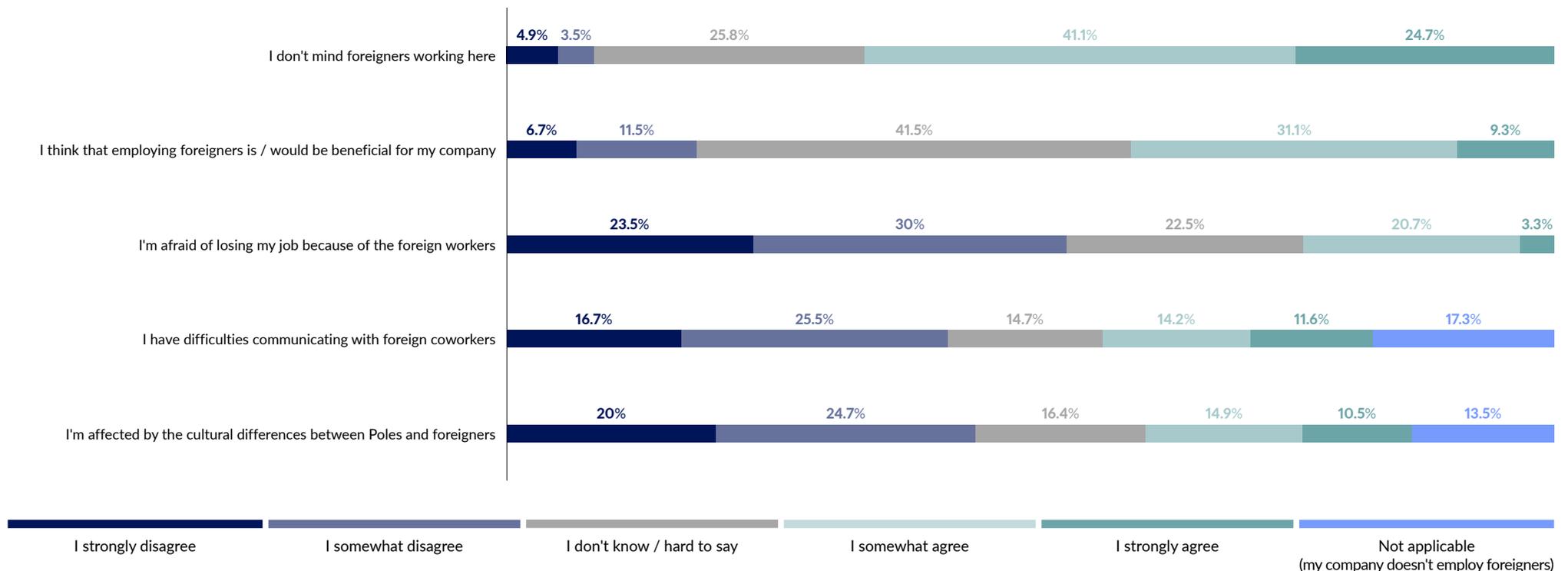
Hiring foreigners from employee perspective

The perception of recruiting foreigners by the surveyed employees hasn't changed notably since last year, although some trends are noticeable. The **vast majority (66%) of surveyed employees don't mind foreigners being employed in their companies**, though the number has fallen slightly since last year (from almost 69%). What didn't change, however, was the number of people concerned about losing their jobs to foreigners (24%, up from 23% last year). These concerns increased most strongly among the youngest workers (30%) and tend to decrease with age (among those over 55 years of age, only 13% expressed such concerns).

We observed a positive development of an **increased number of respondents (from 36% to 40.4%) noticing the benefits of employing foreigners**. At the same time, we have observed an **increased number of people declaring difficulties in communicating with foreigners (25.8%, as compared to 20.8% a year ago)** and **troubling cultural differences (25% as compared to 19.8% a year ago)**. This is an issue primarily for younger employees and men (31%, as compared to 20% women) and managers (36%, as compared to 29% for lower-ranking positions). The language barriers are pointed out much more often by those in leadership roles (33%, with 18% strongly agreeing; among lower-ranking and physical workers, only 20% agree).

For businesses employing or planning to employ foreign workers, this is a clear signal to launch internal initiatives to integrate people of varying nationalities, such as language and cultural training. It's also worth improving manager competences in the area of managing diverse teams.

Attitudes towards foreign employees





CHAPTER 5

New employee groups
as a way to overcome
the ment gap

Adapting the work environment to specific needs of employees

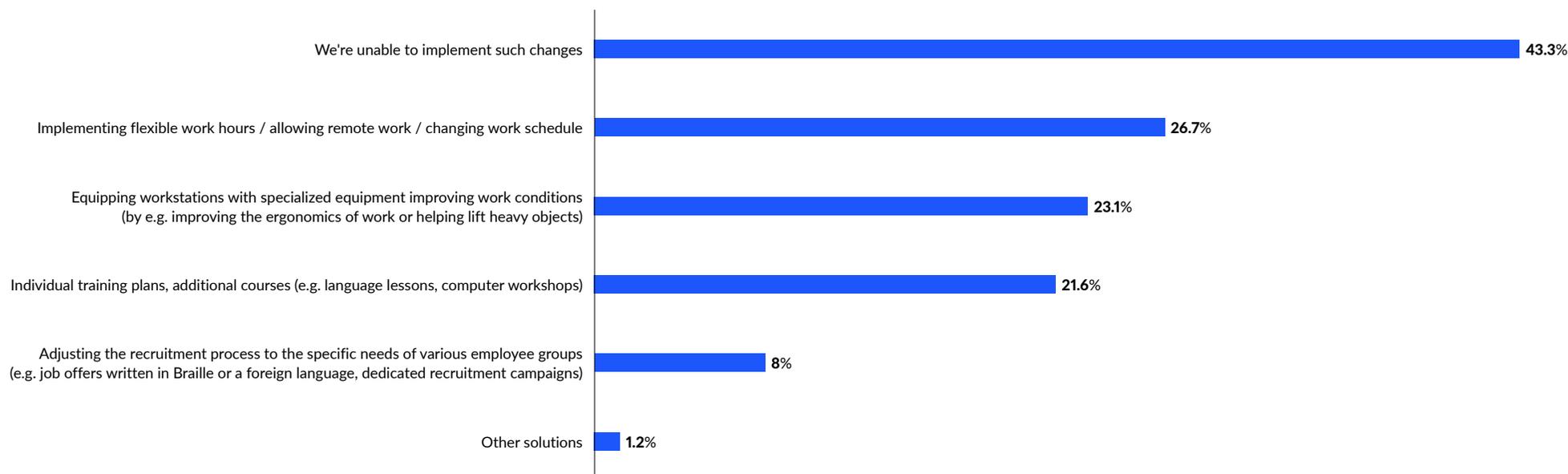
One of the ways to acquire workers with the requested qualifications is by opening oneself up for hiring people hitherto skipped in the recruitment processes. This solution brings a plethora of benefits, but also comes with some challenges, especially in the area of adjusting the workplace environment to their specific needs. Are the businesses ready for such changes, if it would increase their chances to acquire high-quality workers?

43.3% of respondents admitted to not being able to adjust the work conditions in their organization to satisfy the specific needs of various groups of workers, even if it would help attract candidates with certain competences. Almost **27% would be willing to adjust the work mode or schedule** (e.g. by introducing remote work) – especially in the services (34.1%) and commerce (32.5%) sectors. Due to the specificity of their operations, industrial sector enterprises (13.6%) are least open to such solutions.

23% of all businesses are willing to invest in additional equipment to improve the work conditions (by e.g. improving the ergonomics of work or helping lift heavy objects). The industrial sector has shown a particular readiness in this regard, with 29% of respondents agreeing. **A fifth of all surveyed companies are willing to organize additional trainings and workshops for the employees** (e.g. language or computer use lessons).

It bears mentioning that small and medium-sized enterprises are most willing to implement such changes, while the large ones are notably less flexible in this regard. This could be caused by their greater scale of operations – causing greater concerns about necessary expenditures and the risks of the strategy failing.

Would your company be ready to adapt the work environment to the specific needs of various employee groups if it increased the chances to attract people with certain competences? If yes, what areas would it concern?



The respondents could select multiple answers. • N=510

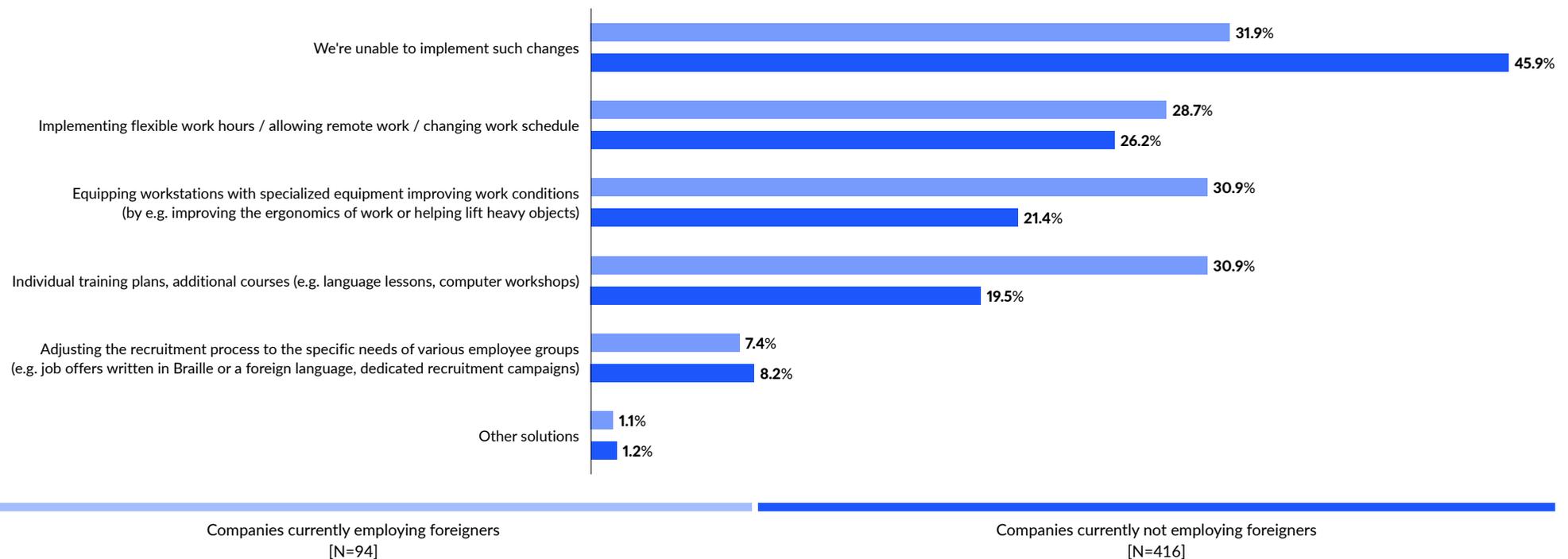
Adapting the work environment to specific needs of employees

When comparing the readiness to adjust the work environment to the specific needs of various employee groups, there are noticeable differences between businesses already employing foreigners and those lacking such experiences. Only **32% of companies employing foreigners** admit to being **unable to adjust the work conditions to the specific employee needs. In the latter group, this percentage amounted to 46%**. Businesses employing foreigners were more willing to adjust their work modes or schedules (28.7% vs 26.2%), purchase specialized equipment (30.9% vs 21.4%) or introduce individual training plans (30.9% vs 19.5%).

These differences might suggest that the unreadiness of some organizations to implement such changes might be caused by their attitudes as much as any objective obstacles. When faced with serious personnel shortages and other circumstances necessitating the employment of people with specific needs, some of them would likely manage to implement the necessary changes.

As can be seen, experiences with employing foreigners tend to open businesses to a greater inclusivity and flexibility in adjusting their workplace environments to the needs of various employee groups. Greater personnel diversity in enterprises necessitates changes of not only technical and organizational nature, but also adjusting one's overall approach. With this in mind, promoting inclusive HR policies, education and exchanging experiences with other businesses are of utmost importance.

Would your company be ready to adapt the work environment to the specific needs of various employee groups if it increased the chances to attract people with certain competences? If yes, what areas would it concern?





Izabela Krzeszewska-Rykowska

Director, Human Resources, Anwis Sp. z o. o.

Openness to diversity is a key to building strong teams

Today, openness to diverse teams is a necessity, made so by the ever-changing world and the need to adjust to the job market environment. In our company, the last few years have seen a gradual evolution of the approaches to management and opening up to employees from various diverse groups.

When we faced difficulties in acquiring male workers for certain positions, we took action to adjust our workplace and create positions for women that were previously exclusive to men. This required us to reorganize our processes, prepare appropriate, women-friendly workstations and welfare measures – but even more importantly, it required us to change our way of thinking.

Furthermore, our team has been joined by foreigners, members of various generations and people with disabilities, all of whom have granted us the great potential of their diverse experiences and perspectives.

Such an open approach provides an advantage in the labor market. It provides additional opportunities in recruitment and talent acquisition processes, thus allowing us to attract motivated, loyal employees and create internal relations based on acceptance and respect for diversity. This builds and legitimizes our image as an organization following the idea of corporate social responsibility.

I wish everyone to find the courage to go beyond the well-known solutions. Our experience proves that the methods we found the courage to try are an effective strategy for building strong teams.



Jarosław Nieradko

Recruitment and Onboarding Manager at Contact Center, Santander Consumer Bank

New technologies open up new opportunities for employment

Including employees with specific needs, also those with disabilities, in one's teams is more than just corporate social responsibility but also an aspect of a greater strategic approach able to bring benefits to both employers and employees. We are well aware of that – this is why we've been employing people with disabilities for years and our Wrocław headquarters are well-adjusted to various needs of our employees.

New technologies and remote work opportunities have opened the possibility of working with those for whom the traditional work environment might pose numerous barriers – physical, sensory or communication. Both sides benefit from that. The employees find it easier to find and perform work while the employers are gaining motivated team members able to effectively contribute to the organization's success, oftentimes exhibiting extraordinary adaptation skills and future consequences.

Remote work opens many new opportunities, especially for jobs that can be performed fully remotely, such as many IT, administration, design, customer service or education tasks. This can be seen in the results of research presented in this report – in the services, commerce and public sectors we are seeing the greatest openness for employers adjusting to the expectations of people with specific needs. The industrial sector has the least amount of such companies. While largely understandable, even this area is not without organizations that have such opportunities and choose to open themselves to people with disabilities, such as Alphapointe¹, an American company successfully employing visually impaired workers.

It's worth utilizing the potential of technological change, especially since research quoted by the Harvard Business Review [2]² documented it bringing mutual benefits to employers and employees alike. People with disabilities greatly value flexibility and being able to adapt the workplace environment to their needs. From the viewpoint of companies, broadening the reach of available talents is especially important – to encompass both those unable to work from an office at all and those who live farther away from the company headquarters. Moreover, organizations that allow one to work remotely are perceived as more attractive on the job market, helping attract and retain talent.

At the Santander Consumer Bank, we understand this well and offer the ability to work under different models. Contact Center employees can carry out their tasks in a modern office, fully remotely from their homes or under a hybrid model. Of course, for remote work to remain effective and friendly, it was important to provide our teams with the necessary tools and technology, as well as ensure an organizational culture that promotes communication and cooperation. This also meant a need to train both the employees and their managers in the area of remote work best practices and sensitivity to the needs of people with disabilities. These efforts lead to positive effects: according to our periodic Stay Interview research carried out in the Contact Center Department, people working under the remote and hybrid models tend to rate their jobs much higher than their colleagues working from the office. The eNPS indicator is higher for them by over 60%. They are also much less likely to consider seeking a new job. Our example shows that utilizing remote forms of employment is not only a chance to include people with disabilities in the workforce but also strengthen employee retention, limit turnover and increase workplace satisfaction

In summary, opening oneself to employees with disabilities and offering remote work are not only measures to increase inclusion and equity but also a strategic choice with possible business benefits. By utilizing the potential of people with varied needs and skills, they can greatly increase their innovation, productivity and competitiveness in the market.

¹ <https://www.nature.com/articles/s41599-021-00707-y>, <https://www.alphapointe.org/about/>

² <https://hbswk.hbs.edu/item/how-companies-benefit-when-employees-work-remotely>



Marta Tokarz

HR Manager, KIRCHHOFF Polska Sp. z o.o.

Multiculturalism and diverse teams are a necessity for modern businesses

Is it even still possible to imagine a homogenous and hermetic business environment? The times of uncertainty and constant change bring a rather obvious answer – diversity has become not only a necessity, but an integral part of doing business.

At KIRCHHOFF Polska Sp. z o.o. in Gliwice, we have been successfully employing foreign workers for several years. At first, we focused on Ukrainians – including women fleeing the war. Nowadays, our team consists of over 900 people, of whom 18% are Ukrainian citizens. Over 50 of them are employed directly in our facility. Since a couple of weeks, we are also working with Filipinos. Right now, it's a small group, which will eventually amount to 25 people.

It also bears mentioning that a fourth of all our employees are women.

These statistics are more than just numbers. They're also proof that multiculturalism and gender diversity are not only a chance, but also a necessity for ensuring the continuity and further growth of the business. Without inviting foreigners and creating appropriate work conditions for the women, it would be difficult to realize the production goals.

Quite importantly, this diversity provides access to various important competences – technical, social and leadership skills alike. We have seen the first internal recruitment offers and promotions among foreign workers. It turns out we are learning a lot from each other, not merely professionally, but also in cultural terms. We become more open to others and each subsequent nation is being welcomed more warmly and with a more positive attitude. Our organization forms a part of a large, international entity and we're happy that multiculturalism took hold as an everyday occurrence in Gliwice, as it had done in other factories in Germany, the USA, Portugal or Canada.

What do employees think about working in diverse teams?

The results of our survey suggest that the employees are seeing the positive impact of diverse teams on their work and overall workplace atmosphere. Almost **69% of the respondents believe that working in a diverse team helps develop soft skills** such as communication, cooperation or empathy. Almost **65% agree that it helps disprove stereotypes and prejudices** and **58% claim that it helps problem-solving and coming up with new ideas**.

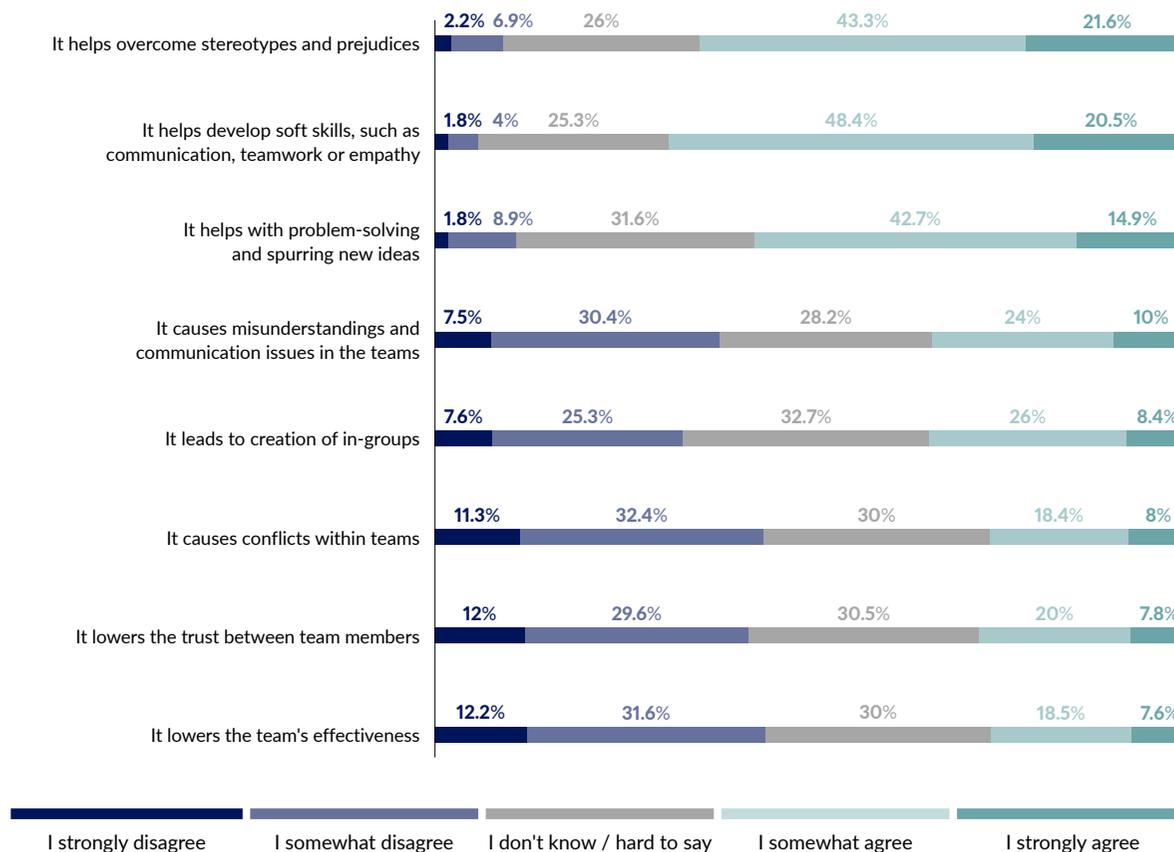
However, diversifying the teams also brings some challenges. The most important of them, according to our respondents, is creating in-groups complicating work – 34.4% of our respondents claimed so, with 33% disagreeing. The employees have also pointed out communication issues (34%). A fourth of them, approximately, have claimed that diversifying the teams can lead to internal conflicts, impact trust between co-workers and lower their overall effectiveness. However, it bears mentioning that over 40% of the respondents disagreed.

We also took note of differences between the employees with experience working in diverse teams and those without it. While both groups ultimately agree on the positive impact of diversified teams on the development of soft skills, creativity and disproving stereotypes, people with prior experience working in such teams are much quicker to reject the claims of spurring conflicts, lowering effectiveness or undermining trust between workers. People without such prior experiences are also much more likely to stay undecided about these claims.

This suggests that the employees aren't inherently prejudiced towards diverse teams and are open to them. Once they gain practical experience with them, they tend to lose their prejudices and notice more positives than negatives.

For employers, this should hint at the best ways to support their diverse teams and the areas requiring special attention.

In your opinion, how does the diversity of a team (in such terms as age differences, gender diversity or having colleagues from various countries) impact workplace efficiency and atmosphere? To what extent do you agree with the following statements? Answer on a scale of 1 to 5, where 1 means "I definitely disagree and 5 means "I definitely agree".

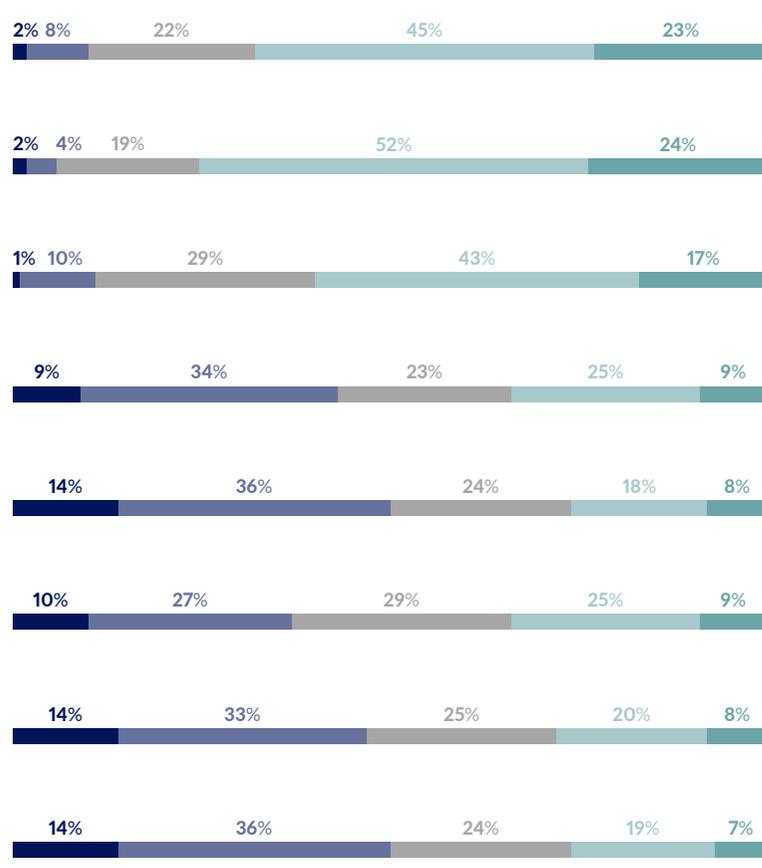


What do employees think about working in diverse teams?

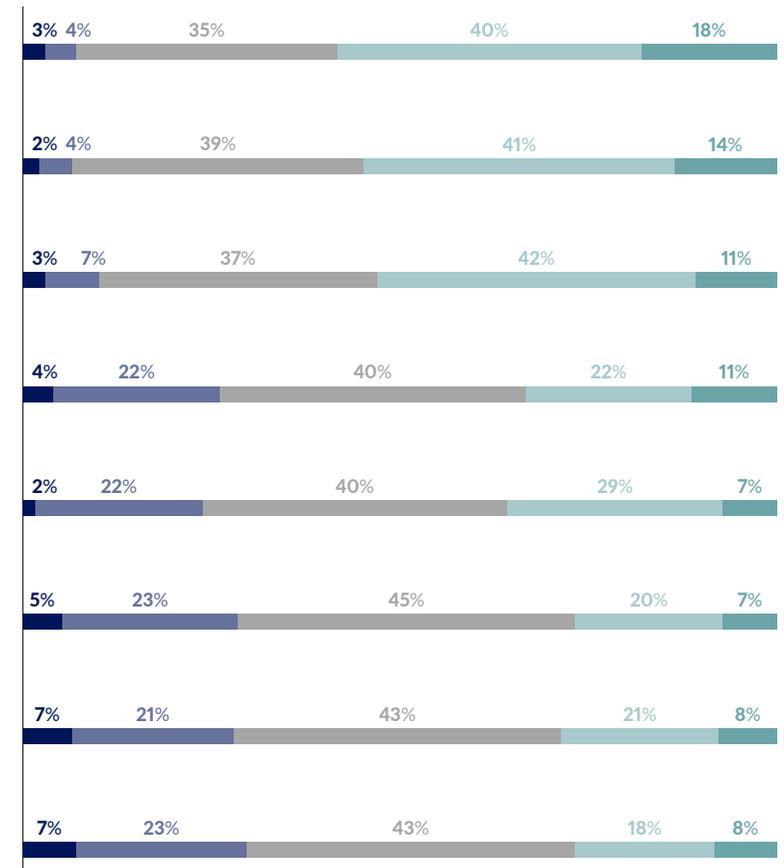
In your opinion, how does the diversity of a team (in such terms as age differences, gender diversity or having colleagues from various countries) impact workplace efficiency and atmosphere?

To what extent do you agree with the following statements? Answer on a scale of 1 to 5, where 1 means "I definitely disagree and 5 means "I definitely agree".

Question answered by respondents working in diverse teams



Question answered by respondents working in diverse teams



I strongly disagree

I somewhat disagree

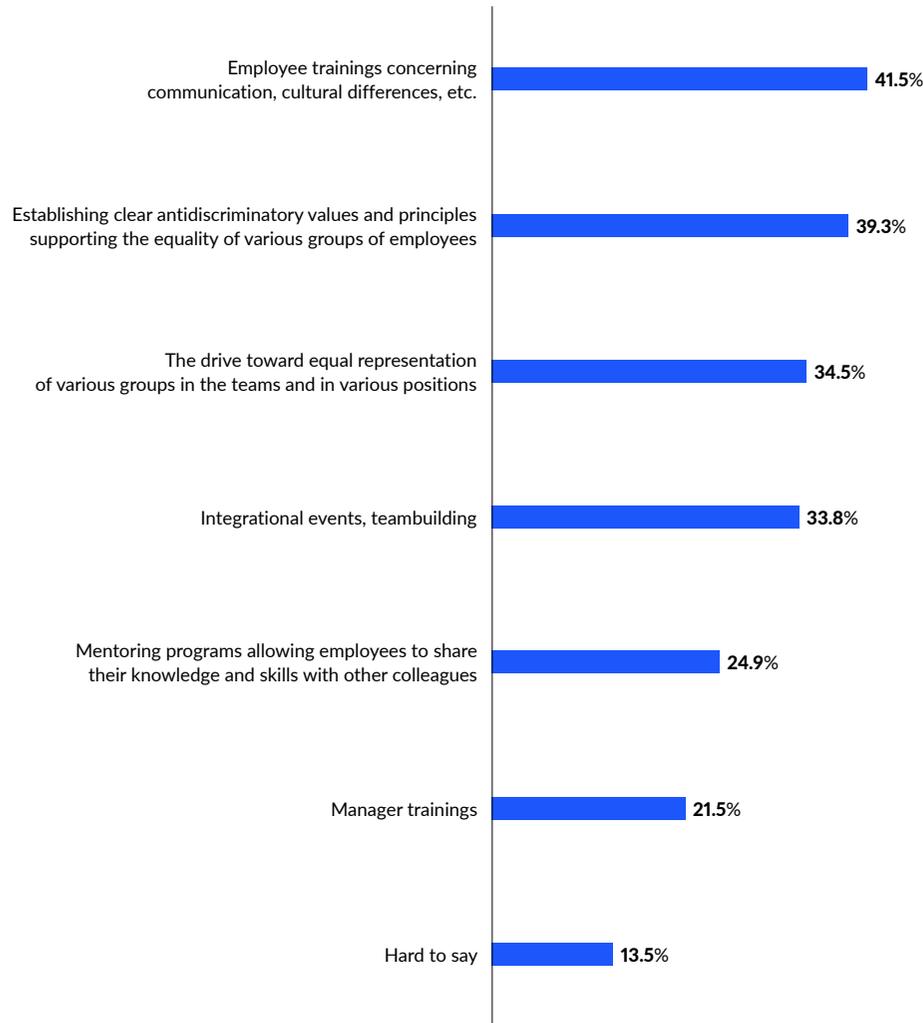
I don't know / hard to say

I somewhat agree

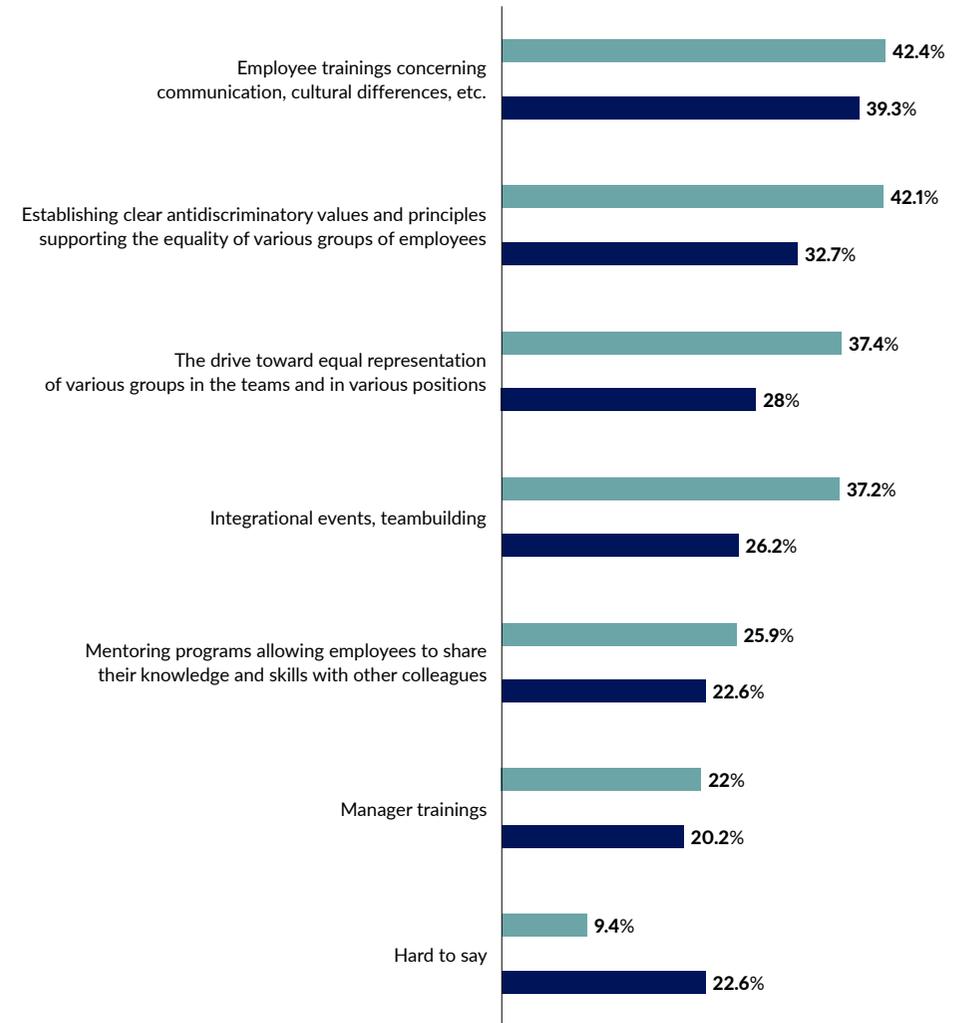
I strongly agree

Supporting the work of diverse teams from employee perspective

In your opinion, what initiatives should be taken by your company to support the work of diverse teams (in such terms as age differences, gender diversity or having colleagues from various countries)?



In your opinion, what initiatives should be taken by your company to support the work of diverse teams (in such terms as age differences, gender diversity or having colleagues from various countries)?



Respondents who has worked in diverse teams

Respondents who hasn't worked in diverse teams

How are companies supporting the work of diverse teams?

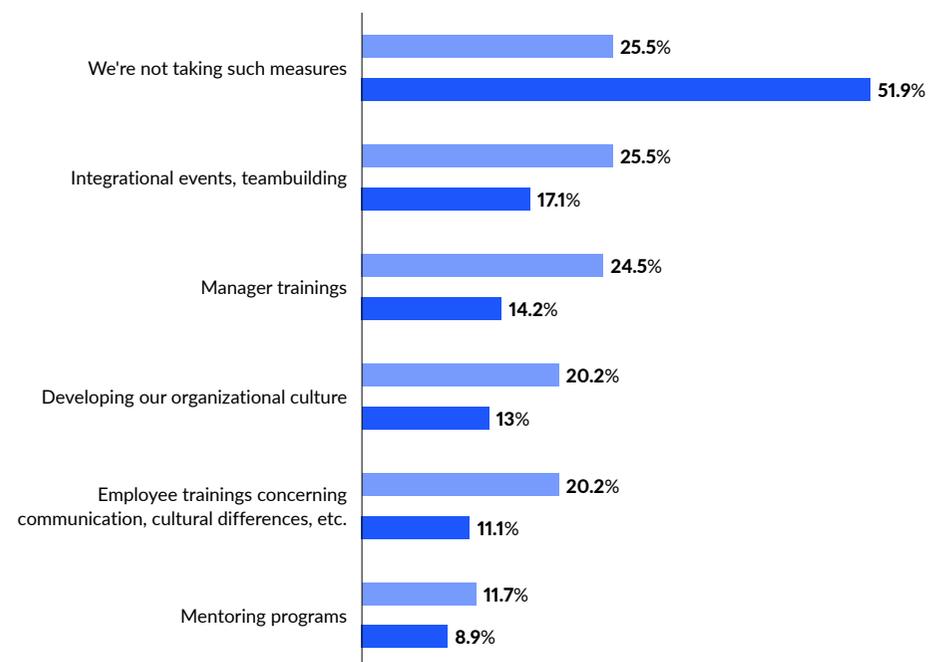
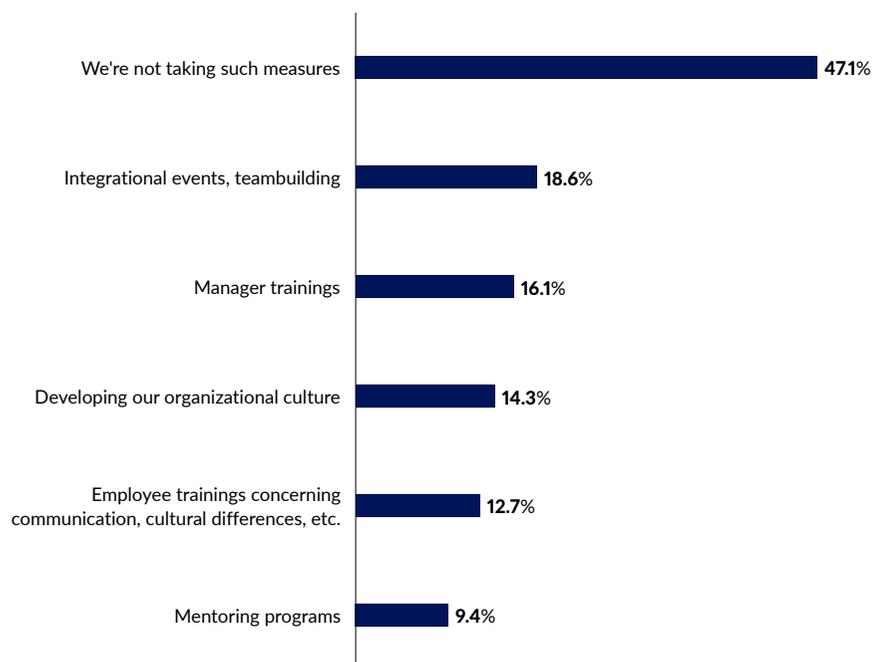
Almost half of our respondents **(47.1%) haven't implemented any initiatives to support the work of diverse teams**. This is usually true of small enterprises, likely due to a smaller number of employees inherently making the teams less diverse. Public sector companies are the least likely to implement such initiatives (with 51.4% not doing so).

Among the organizations implementing such measures, integrational and teambuilding initiatives are the most common (18.6%). The businesses are **also training the management staff (16.1%)** and focusing on **building the internal organizational culture (14.3%). Employee training is a bit more rare (12.7%).** Commerce sector companies are the most open to such initiatives, while the public and industrial sectors are least eager to implement them.

Once again, we can observe a difference between the answers of businesses already employing and not employing foreigners.

Those with prior experience in working with foreigners are much more likely to actively support diverse teams. Only 25.5% of them declare not taking such initiatives. Among the employers not employing any foreigners, this amounted to almost 52%.

Does your company take initiatives supporting the work of diverse teams? If yes, what?



Companies currently employing foreigners
[N=94]

Companies currently not employing foreigners
[N=416]

The respondents could select multiple answers



Agnieszka Balcerska

HR Manager experienced with manufacturing, automotive and fintech sectors

Inclusive leadership requires courage

The inclusive leadership model is based on relationships that help reach mutually beneficial goals. It's of key importance for supporting the integration of diverse teams and helping break the stereotype of "fitting" an organization. Instead of seeking identical copies of our team members (or ourselves), the leaders are seeking co-workers able to introduce new talents, competences and perspectives. The latter is particularly important for the creativity and growth of the operation.

A leader seeking to create an inclusive work environment appreciates diversity and creates space for their coworkers to get involved in the work of the teams. They appreciate the uniqueness of every person, focusing on their advantages and skills more so than on their weaknesses. They lead a team, solving issues, proposing solutions, making decisions and implementing changes in a way that reflects the needs of various employees. They set goals together with their team and define roles based on the talents and motivations of their members.

An inclusive leader exhibits a lot of courage: both in the ability to admit their weaknesses and deficiencies and in questioning the status quo, pointing out organizational barriers and behaviors obstructing change. They're able to accept the imperfect results of a change process, promoting creativity and responsibility. At the same time, they believe that everyone acts in good faith and spreads this attitude within the team, preventing unnecessary conflicts.

In an environment supportive of diversity, feedback information and the readiness to provide or receive it are very important. One could say this is important in every business environment – and they wouldn't be wrong. However, there are leaders who not only give but also gracefully accept feedback, knowing it's a very valuable gift: one of self-reflection, mindfulness, empathy and understanding of the limitations ahead.

In diverse teams, no one has the exclusive right to an "ultimate truth", including the leader. It's a real challenge for bosses stuck in stereotypical modes of thinking and feeling infallible. The varied perspectives bring incredible energy for creating and developing products, building customer satisfaction, or planning and implementing processes. An inclusive leader cares not only about reaching their goals but also about whether everyone has been invited to participate in their implementation. The goal might be shared, but everyone has their own idea of how to reach it. To better establish a shared understanding, the leader should listen intently, be open to criticism and remain aware of their biases.

Finally, inclusive leadership also includes cultural intelligence. It's not just about knowing who eats with chopsticks, who eats with a fork and knife and who's using their hands; whom should they send a Christmas card to and who celebrates Diwali. While it is important, there are even more important issues, such as recognizing different styles of communication. The culture one grows up in imbues a certain style of communication: one we are used to and one we expect. It can make us more or less direct, expressive or restrained. Similar differences concern the perception of time, conflict management, distancing of leadership, or expectations toward others – all of which ought to be well-understood.

In a diverse environment, for which openness to differences is a core value, diversity ceases to be a source of conflict and becomes a proof of value orientation and a sense of belonging.



CHAPTER 6

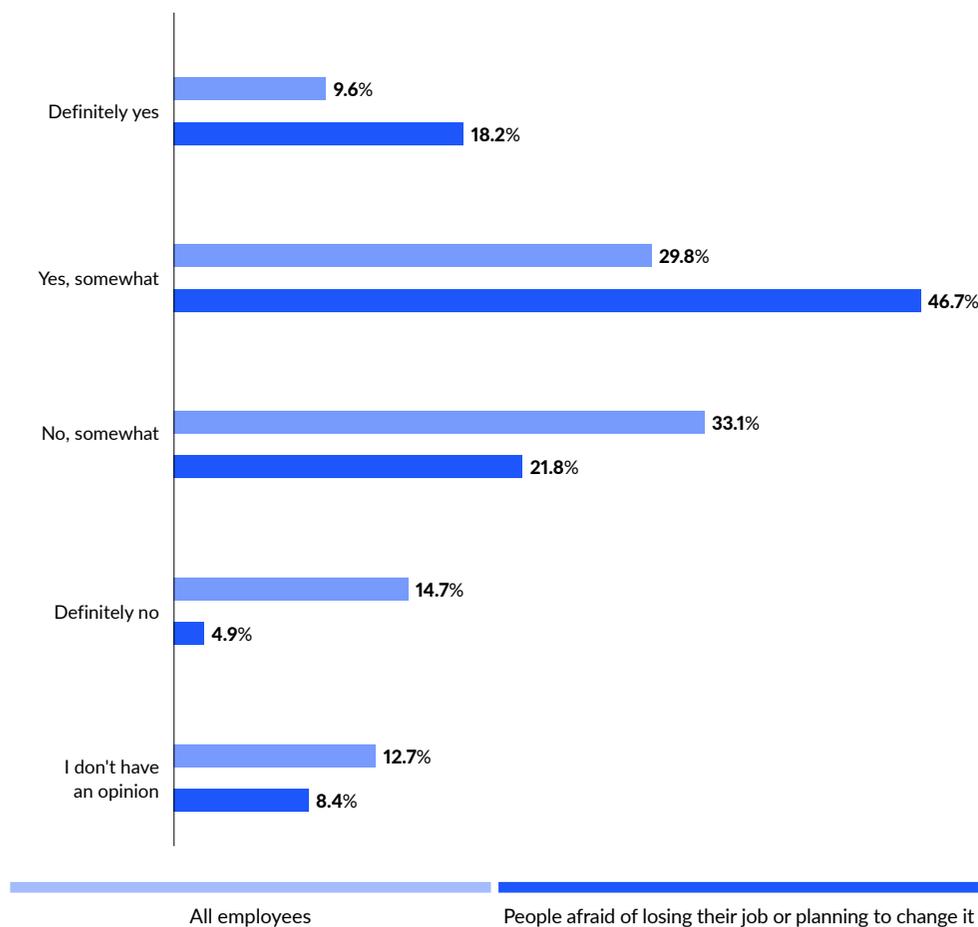
Reskilling and upskilling
as a way of filling the
competence gap

Reskilling – are the employees willing to do it?

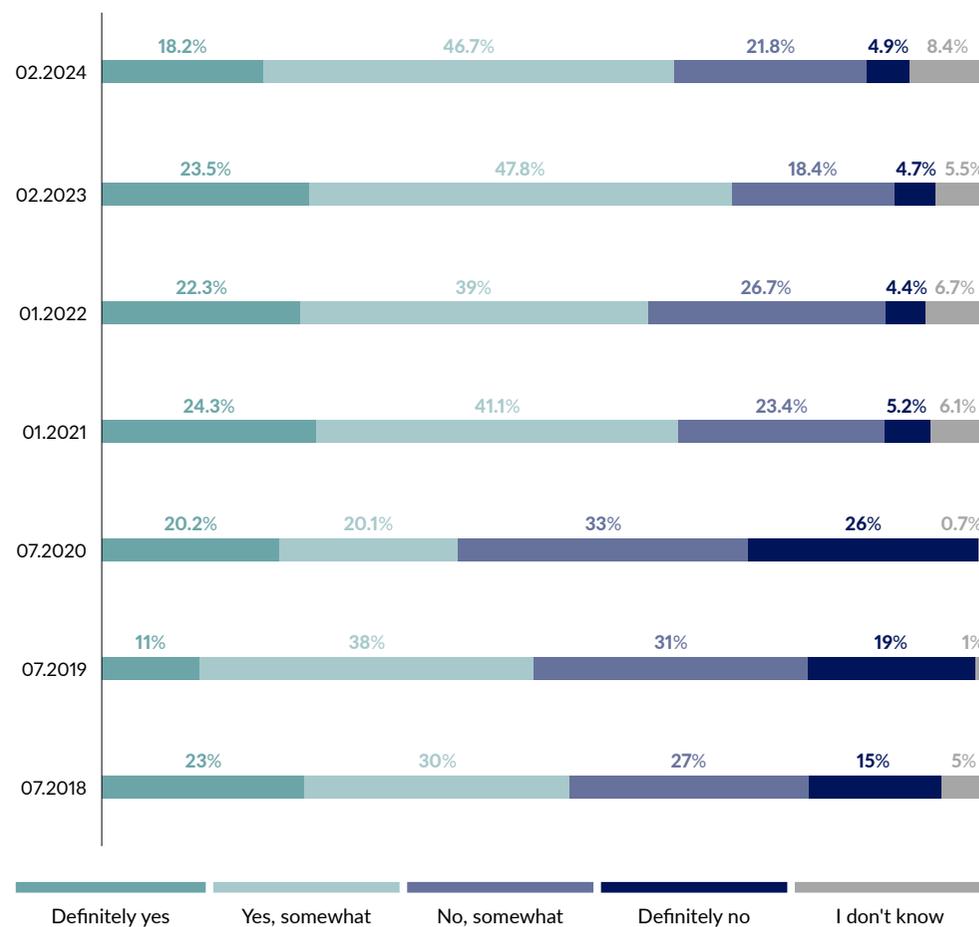
Almost **40% of the surveyed employees are thinking about changing their profession. Among those concerned about their employment and seeking a new workplace, this percentage is even higher at 65%.**

While one can observe a slight drop as compared to last year's results (when 41.9% of employees expressed interest in reskilling), a noticeable trend of increased willingness towards changing one's profession has been present since 2020.

Are you considering changing your current profession / reskilling?



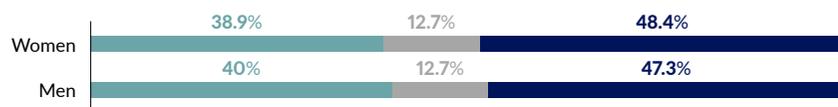
Plans to change one's profession over the past years - of those afraid about losing their jobs and/or wanting to change it*



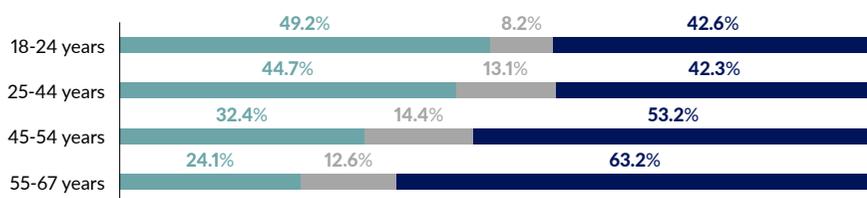
* Question answered by respondents afraid of losing their job or planning to change it.

Who's willing to change their profession?

Willingness to reskill across genders



Willingness to reskill across age groups



Who's willing to change their profession?

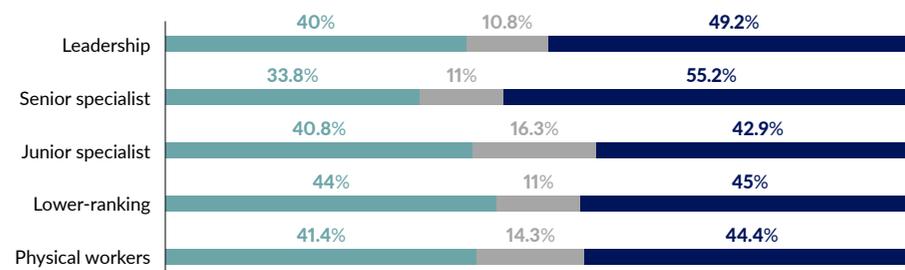
The willingness to reskill is definitely higher among the younger employees. In the 25-44 age group, almost 45% of people are willing to reskill, with the youngest workers under 24 years of age even more open at 50%. This could be because the younger workers are more flexible and able to adapt to the changes. They are also looking at a much longer professional career ahead of them, meaning the potential benefits of reskilling are much greater.

The openness to change one's profession is also strong among lower-ranking employees (44%) and industrial workers (almost half, at 49.6%). There are many possible reasons for that: the drive to increase one's chances for better pay, or less taxing, monotonous or unsatisfying work, or concerns of losing one's job due to ongoing automation, as people tasked with the simplest or physical work are the most vulnerable to this threat.

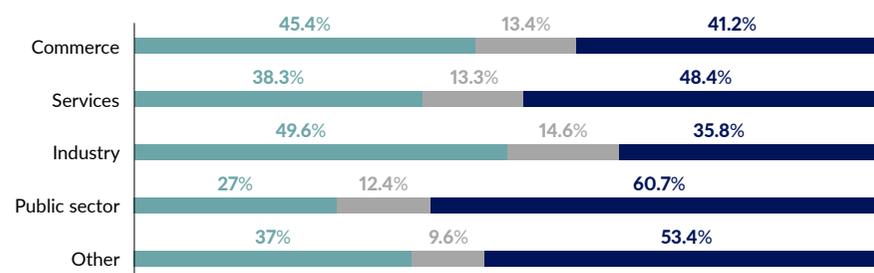
The public sector workers have declared the least willingness to reskill (27%). One could presume that this is due to a greater stability of employment and a sense of security discouraging from the risk of reskilling.

The oldest workers (33.3%) and senior specialists (33.8%) are likewise largely disinterested in reskilling. These employees enjoy a well-developed position and oftentimes are experts in their specialties, with extensive networks of contacts. Changing their profession would mean starting from scratch and discarding their previous position – and likely taking a hit to their salary. They could also be concerned about age discrimination in the recruitment processes.

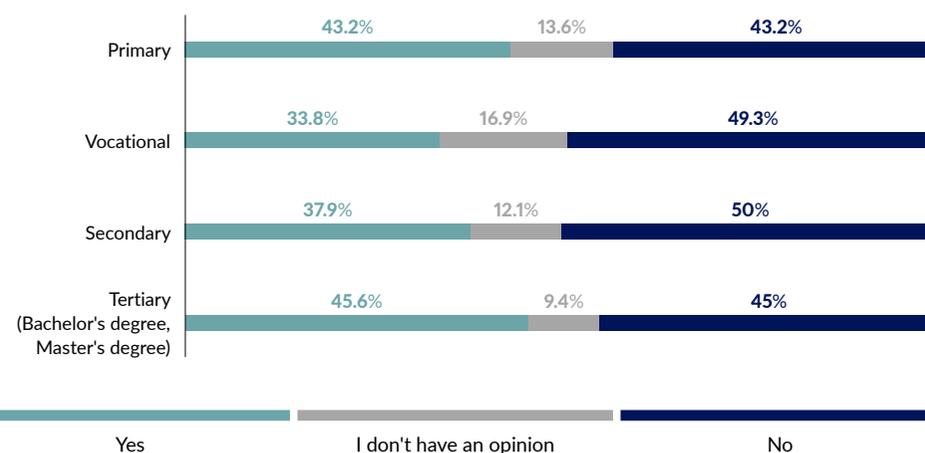
Willingness to reskill across positions



Willingness to reskill across sectors



Willingness to reskill across education levels



How to entice employees to change their profession?

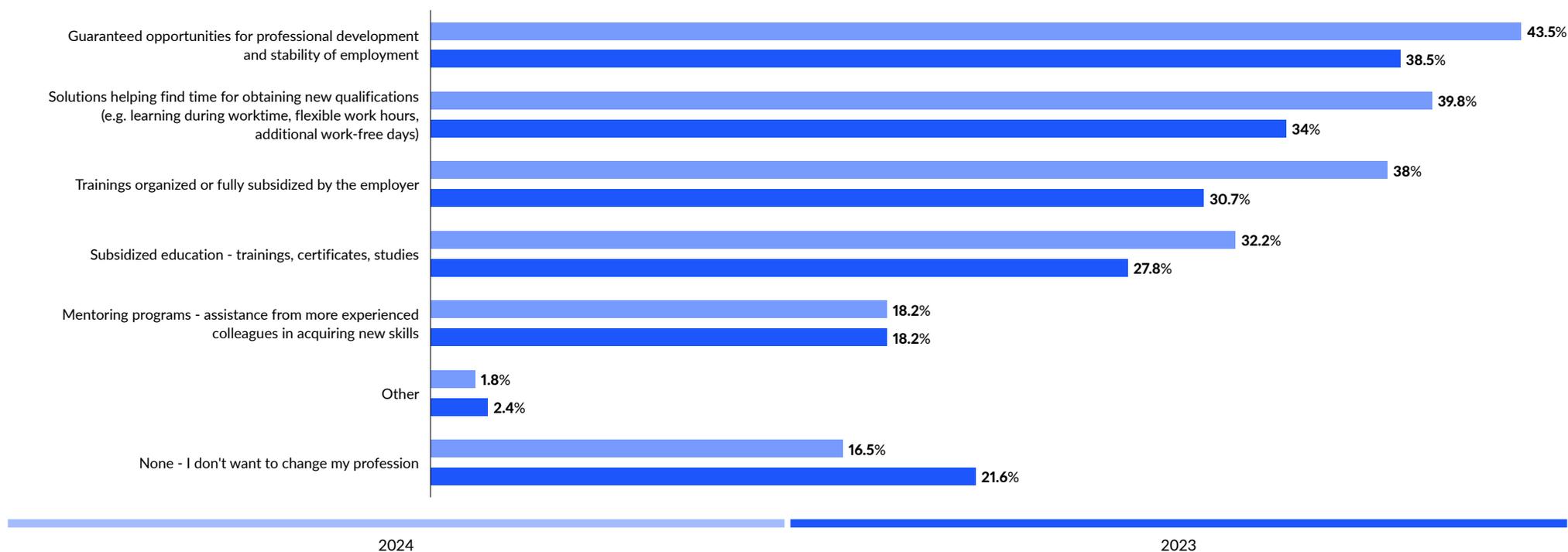
The employees are increasingly open toward changing their professions and the employers could play a crucial role in supporting this process – for a mutual gain. **This year, the employees were more willing to reskill if provided with professional growth opportunities and stability of employment (43.5%, as compared to 38.5% last year).** The two groups agreeing with this most strongly are people aged 25-44 and commerce sector employees.

Solutions helping find time for obtaining new qualifications (39.8%) are also important and particularly valued by the younger employees.

Trainings organized or financed by the employers (38%, up from 30.7% a year ago) are also important. They work especially well in motivating commerce and industrial workers aged 25-44. This age group also values subsidized education, especially among those with primary or tertiary education. On the other hand, mentoring programs are being appreciated more by higher-ranking employees.

Reskilling certainly isn't the easiest or cheapest way of acquiring personnel with specific, necessary competences. However, supporting this process by the company does more than increasing its success chance. It's also a chance to attract more motivated and committed employees.

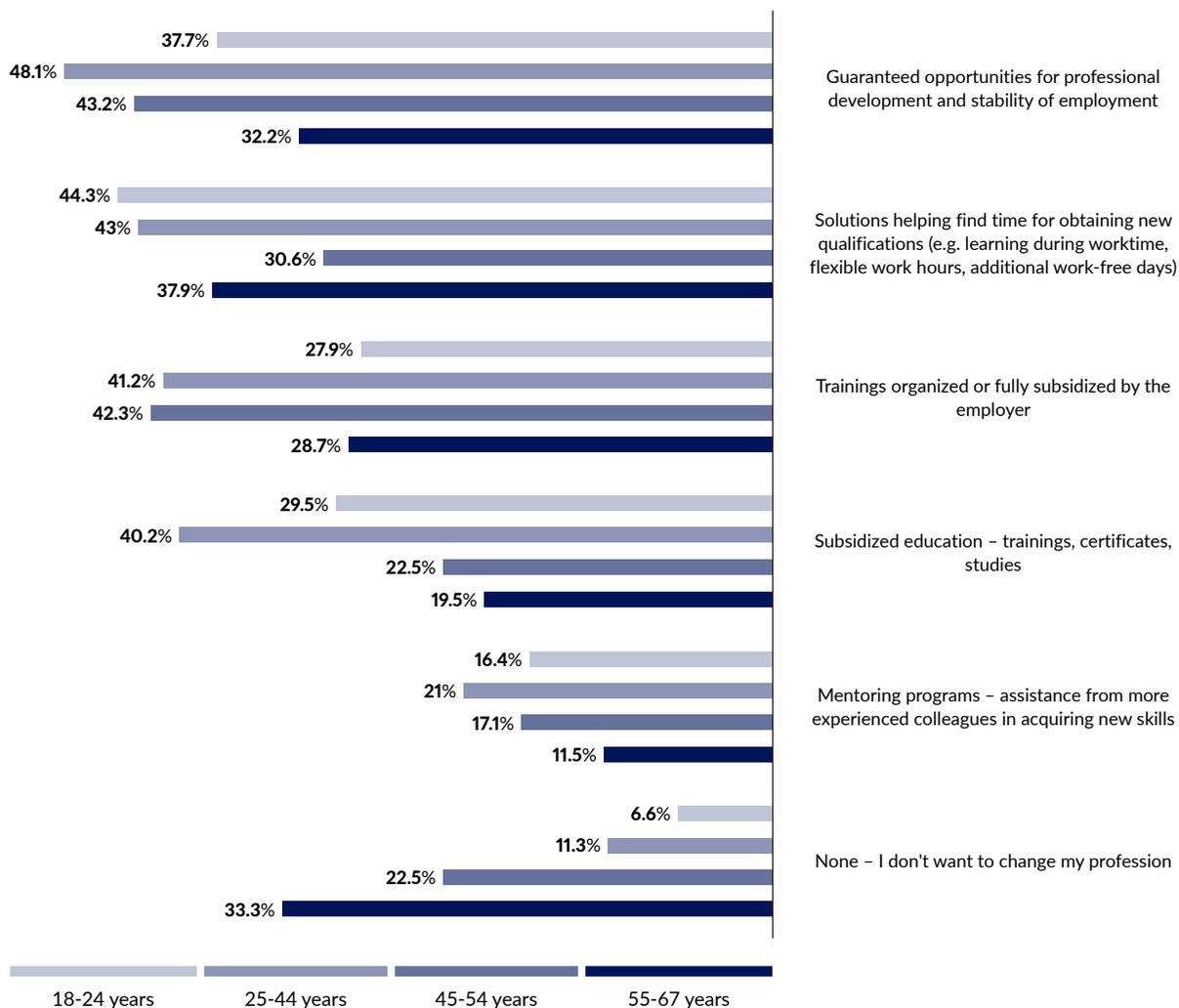
What employer initiatives (in the current of a future workplace) would convince or entice you to change your profession?*



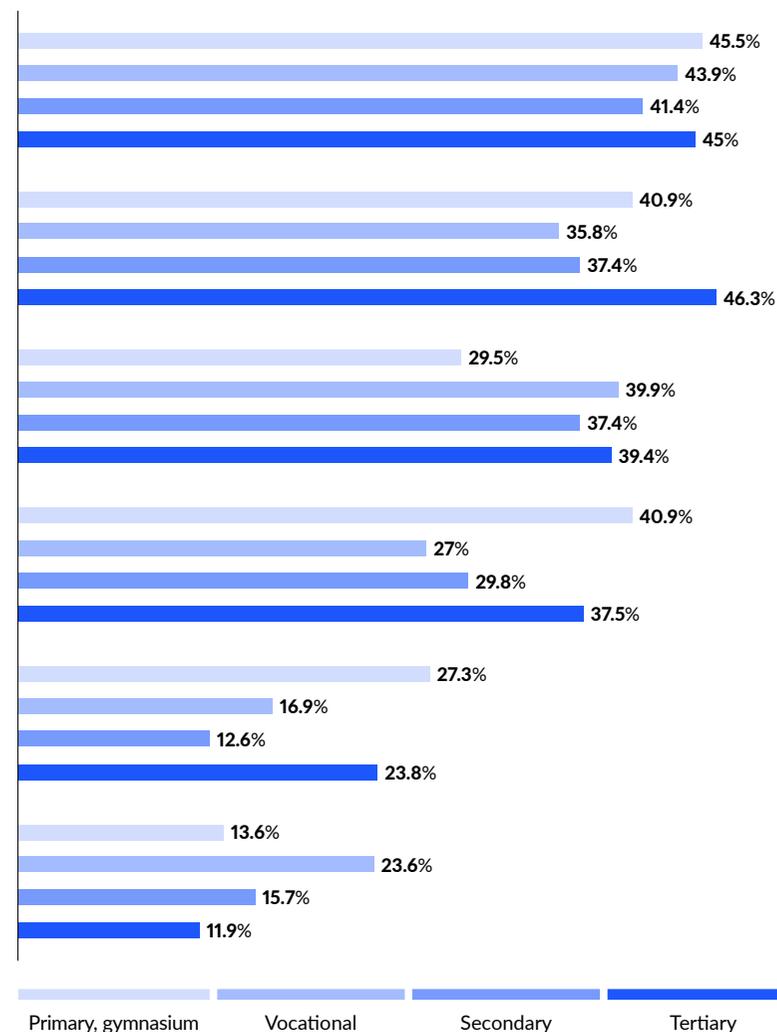
* Respondents could select multiple answers.

How to entice employees to change their profession?

Motivators to change one's profession across age groups*



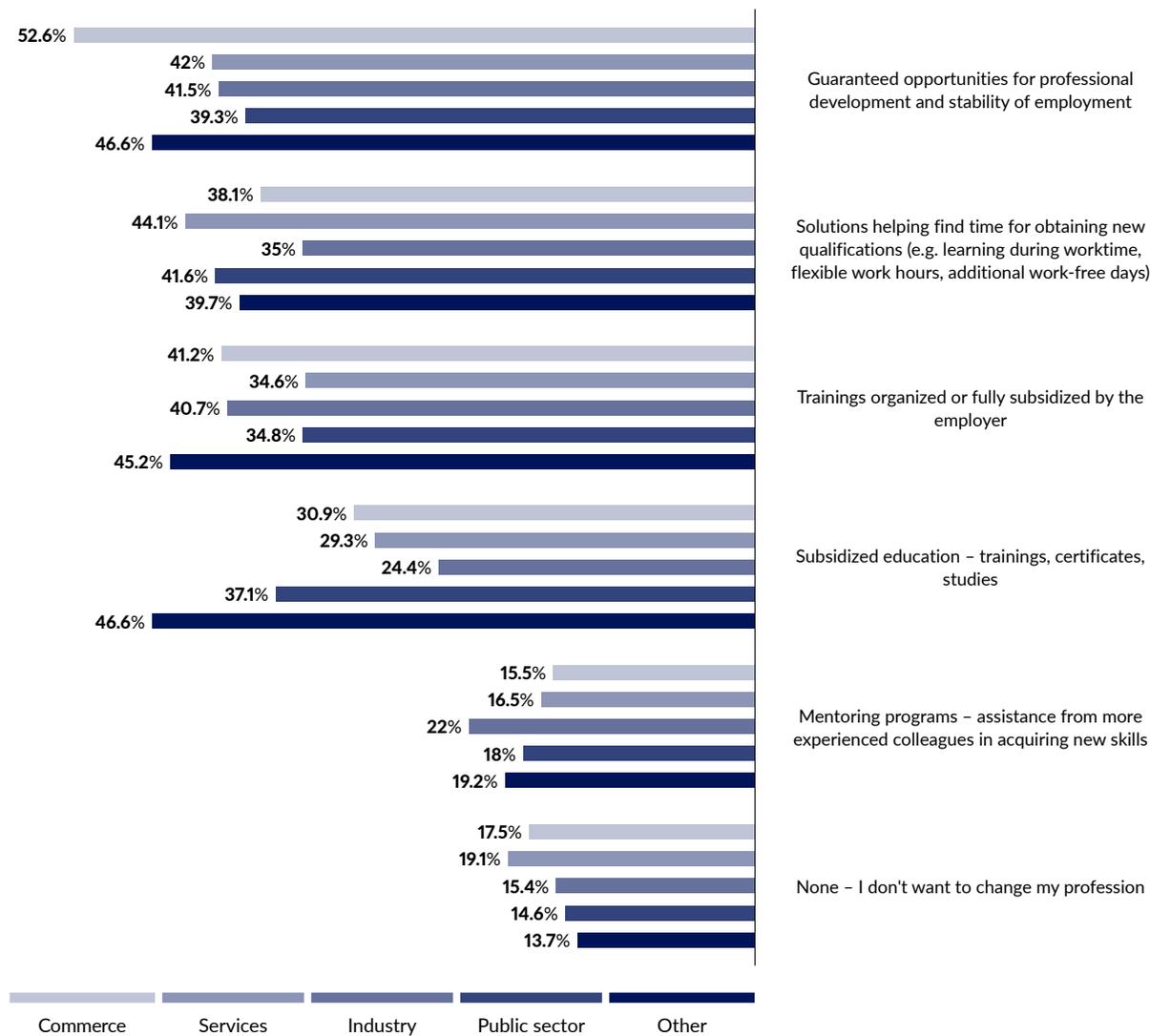
Motivators to change one's profession across education levels*



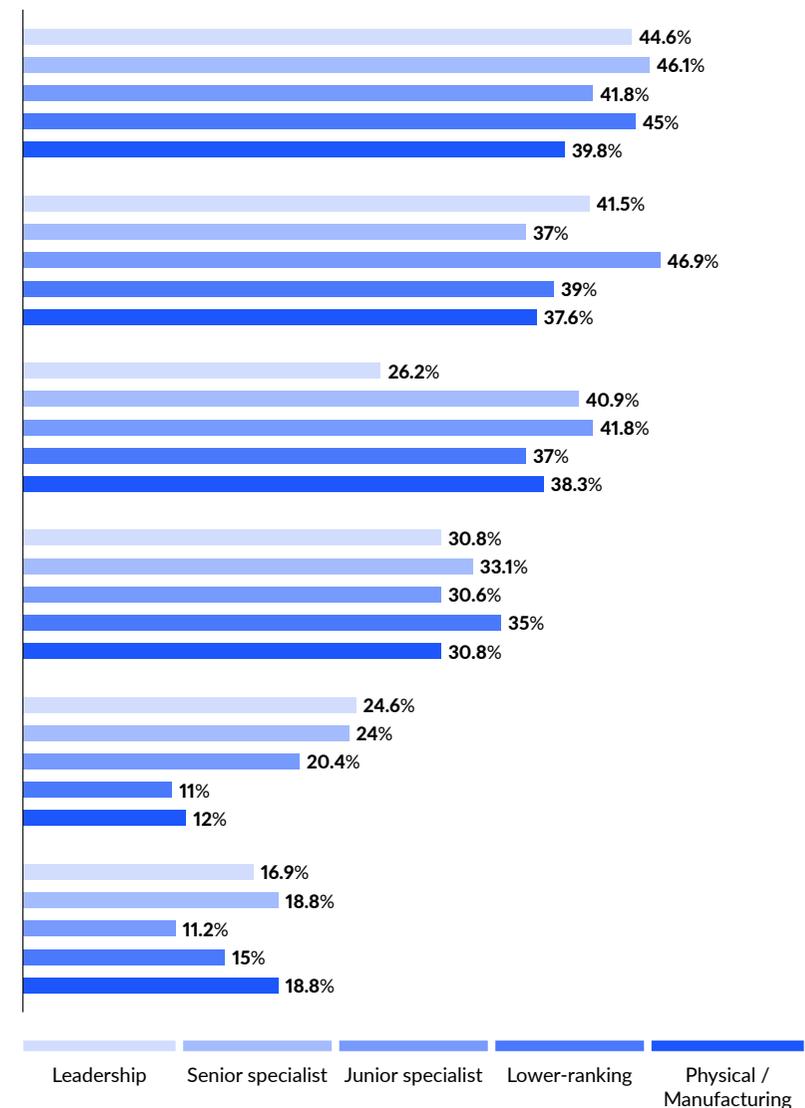
* Respondents could select multiple answers.

How to entice employees to change their profession?

Motivators to change one's profession across sectors*



Motivators to change one's profession across positions*



* Respondents could select multiple answers.

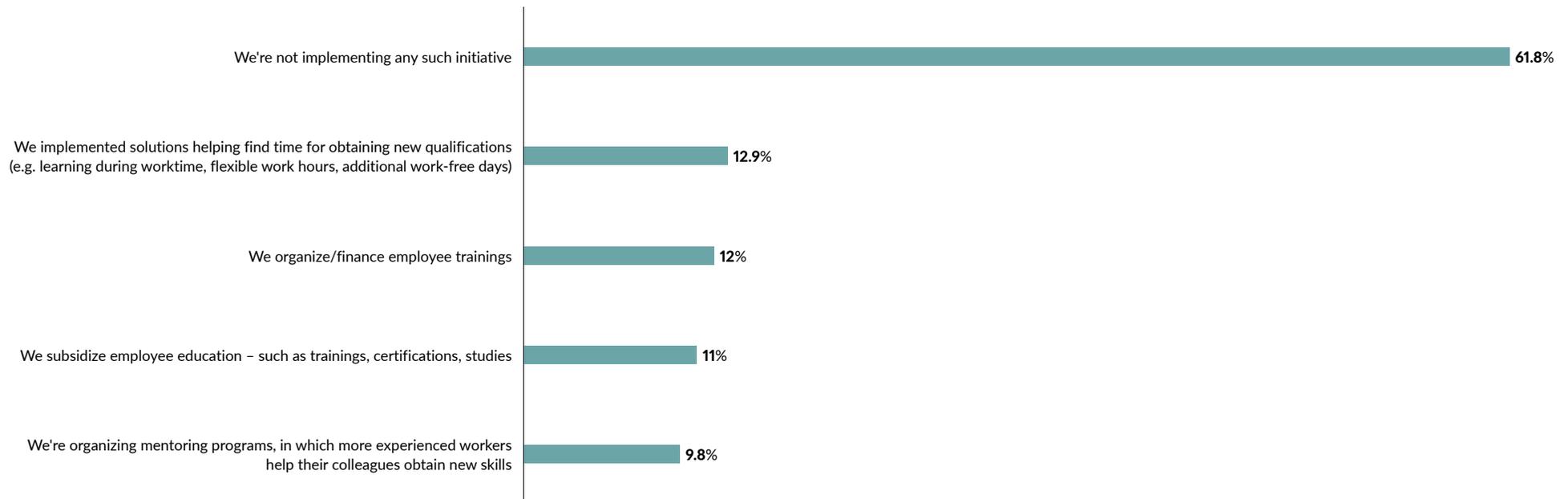
How are companies supporting employee reskilling?

While employee deficits and competence gaps are an issue for many businesses, **almost 62% takes no initiatives to help their candidates and employees in obtaining new qualifications or reskilling. Among the companies making such efforts, most focus on helping find time for learning (12.9%) and organizing or subsidizing trainings (12%).** These forms of support are aligned with the employee expectations, but the scale of their occurrence is relatively small when taking into account the scale of the problem.

Presumably, the simplest solution would be to place burden of reskilling and upskilling on the employees. However, due to the costs of such endeavors, they might find it difficult to tackle this challenge.

The consequences of businesses not putting in their own efforts might include worsening the pre-existing recruitment challenges and the misalignment of candidate competences and employee requirements. From the employer viewpoint, supporting employee development might seem unprofitable – it comes with costs, while the results are uncertain and long-term. However, in the near future it might prove a necessity rather than an option when seeking employees with certain qualifications, especially when it comes to increasingly digitized positions.

Are you helping your employees (current and new hires) acquire new skills or reskill?



Respondents could select multiple answers.



Agnieszka Zielińska

Director of Polish HR Forum

Why are reskilling and upskilling so important?

The difficulties in acquiring the right candidates are among the greatest challenges ahead for employers. Talent shortages in Poland – and other countries – have been defining the job market for years now and are set to continue doing so for decades. The two key reasons for that are the demographics and technological developments.

The „Future of Jobs” report, published by the World Economic Forum, claims that the introduction of new technologies – especially AI-related – will lead to upskilling and reskilling 60% of workers across the whole world. With this in mind, the results of the last “Labor Market Barometer” showing that as many as 60% of all employers take no such initiatives are a cause for concern. This approach will lead to a growing competence gap. At the same time, upskilling and reskilling programs will become a necessity prioritized by employees and employers alike.

In Poland, we struggle with a systemic mismatch between the education system and the business world. There are some examples of best practices for such relationships, but only on a local level. This simply isn't enough. The competences of Polish graduates oftentimes aren't aligned with the job market requirements. Furthermore, vocational schools, which theoretically ought to respond to the growing demand for technicians, machine operators, electricians and other experts, have been struggling with a bad reputation making it harder to attract an appropriate number of students. And yet, Poland remains a country in which a majority of workers are employed in the manufacturing sector. At the same time, the extent to which Poland's industry is robotized remains well below other European countries.

This must change if we are to remain a competitive economy and therefore the competences of employees and candidates also have to change. White collar positions are being automated quicker, as they require relatively low investment expenditures to implement. It's no coincidence that positions set to shrink in employment include primarily administrative, HR, accounting and data entry roles. At the same time, the level of digital skills in Poland remains unsatisfactory. Only 43% of people aged 16-47 have basic or better digital skills, while the EU average is 54%. Another cause for concern is the systematic decline in the number of STEM (science, technology, engineering and mathematics) graduates in Poland. In the 2017/2018 academic year, almost 110,000 people graduated from these faculties. In 2021/2022, this number fell to under 72,000. Yet, according to the Polish Economic Institute, we would need 3.5 times more STEM graduates to fill out the IT gap in our country. This data illustrates the scale of the problem we're dealing with.

Employers must accept the fact their capability to employ candidates with certain competences is limited and that they have to pay closer attention to analyzing their internal resources and improving employee competences. On the other hand, the employees should become more open to the inevitable change. Developing one's competences is a responsibility shared by both employers and the employees.



CHAPTER 7

Counteracting employee turnover

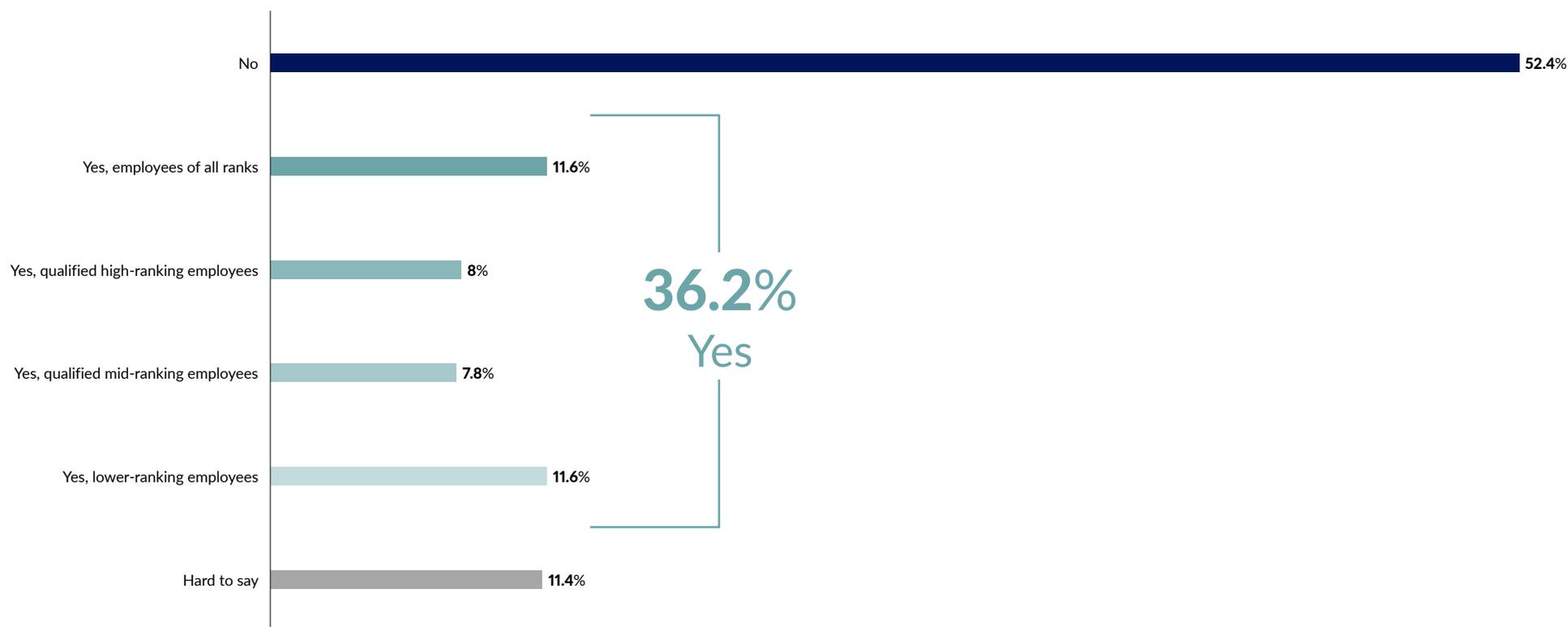
Employee turnover as an HR issue

Over a half of surveyed companies (52.4%) reported no problems with employees quitting. This is a lot less than a year ago, when 87% employers have declared so.

The changes are visible in all types of companies, regardless of their size or industry, with the **largest enterprises seeing an increased turnover rate** (a year ago, 83% of them reported having no such issues, as compared to 40.2% nowadays), as does the **industrial sector** (38.6%, - 47.1 p.p. y/y). Commerce sector appears to be the least affected by this issue. **The increased turnover concerns** all types of positions, although it is reported more often by **lower-ranking employees**, especially in the **industrial sector** (19%, an increase by 11.3 p.p. y/y).

The observed changes can be signaling an improving economic situation, emboldening the employees to seek new jobs. For the employers, who largely aim to maintain their current employment levels, this means additional challenges, both in the area of limiting turnover and acquiring new employees to fill out the remaining vacancies.

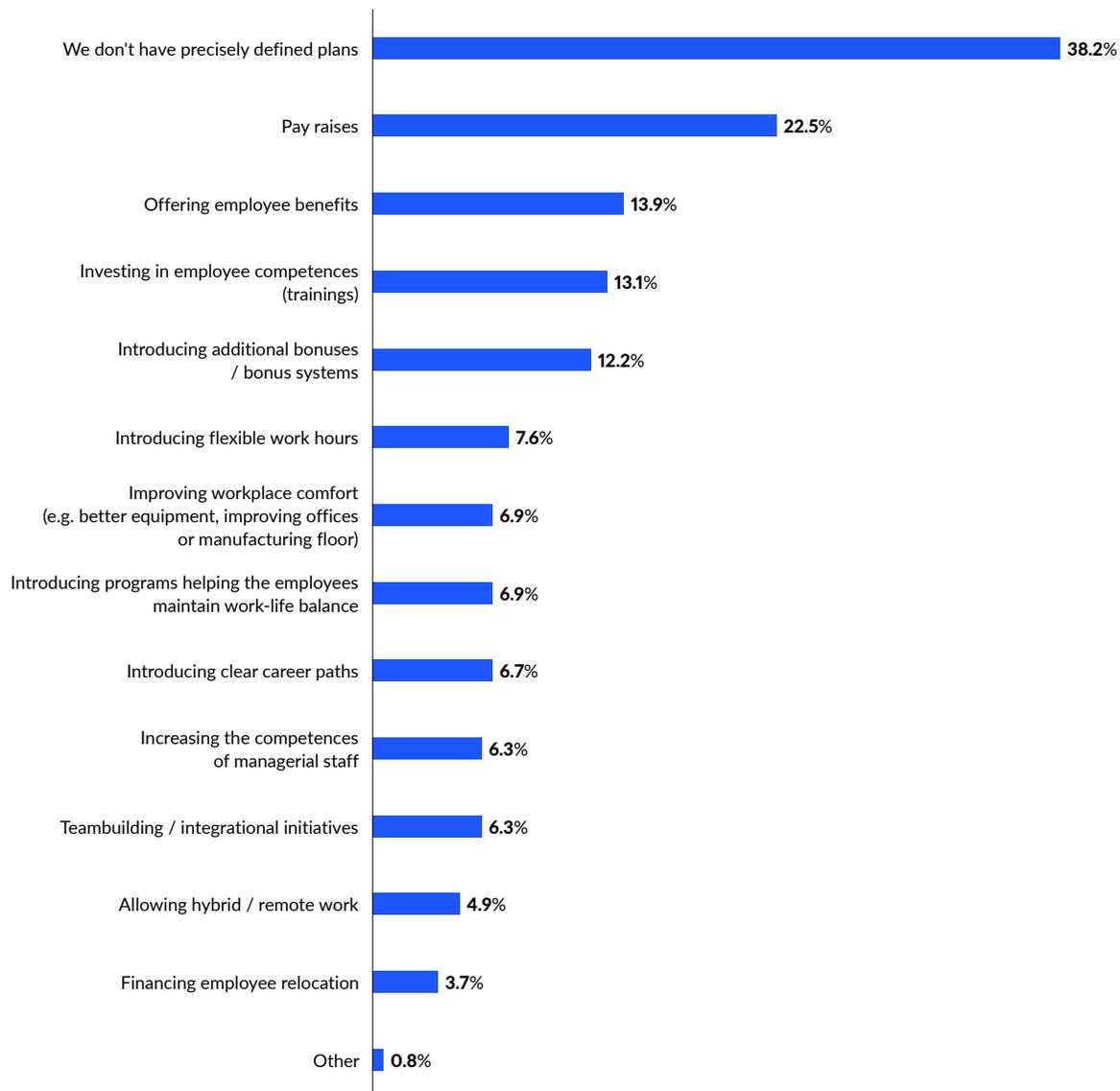
In the past few months, have you had issues with employees leaving? If yes, what groups of employees?



Respondents could select multiple answers.

What are employers doing to counteract turnover?

What measures is your company planning to implement to limit employee turnover?



Respondents could select multiple answers.

What are companies doing to counteract turnover?

Over a third of all companies (38.2%) lacks a well-defined employee turnover prevention strategy – less than a year ago (41%), but nevertheless still a notable percentage.

Interestingly, last year the smallest companies proved to be least prepared in this regard. Now, we are facing the opposite situation – **40% of large entities declares having no plans to limit staff fluctuations**, as compared to 36.3% a year ago.

To counteract employee turnover, the businesses are usually implementing pay rises (22.5%), although this solution is losing popularity each year (24.5% a year ago, 30.6% a year before that).

A similar situation concerns the bonus systems (currently utilized by 12.2% as an anti-turnover measure, as compared to 14.5% a year ago). On the other hand, **employee benefits systems are visibly attracting interest (increase from 7% last year to 13.9%)**. Companies are also strengthening their employee development investments (trainings), although we noted it still being more popular a year ago (a decrease from 16.8% to 13.1%).

This year's results are showing that the employers are seeking increasingly diverse tools to stem the tide of employees leaving. The noticeable fall in popularity of the financial motivators may result from financial constraints, but may also mean that employers are looking for more comprehensive and long-term solutions aimed at building employee commitment and loyalty.

These changes prove a growing awareness of the issues posed by employee turnover and its negative impact on the businesses. An ever-increasing number of companies are noticing the need to adopt a holistic approach to managing their teams, encompassing both the financial aspects and broadly understood employee wellbeing and development.

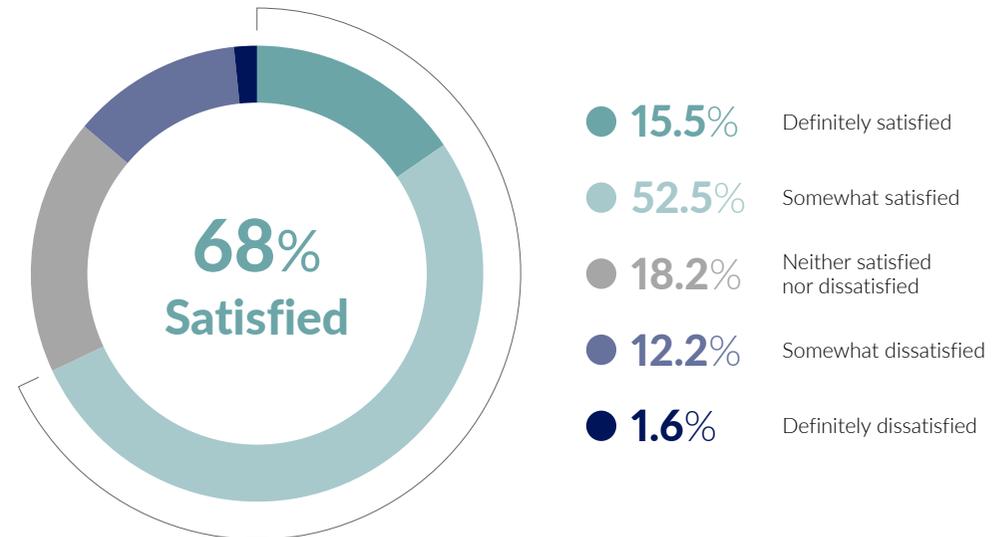
Employee satisfaction in their current jobs

68% of surveyed employees have declared being satisfied at work – marking a slight increase from the last year. Taking a closer look, we have noticed a smaller number of definitely satisfied respondents (a fall from 19.6% to 15.5%), who went on to bolster the ranks of somewhat satisfied employees (an increase from 46.7% to 52.5%). The number of dissatisfied employees has increased as well (from 11.3% to 13.8%).

The satisfaction levels differ between sectors and positions. They're highest among the employees of service businesses and lowest in the industrial and commerce sectors.

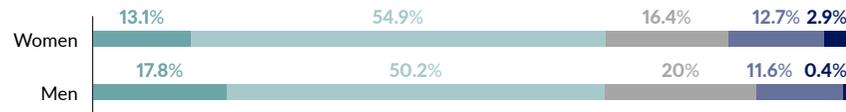
There is a strong correlation between one's satisfaction level, position and earnings. Junior specialists, lower-ranking employees and physical workers with the lowest pay tend to be the most dissatisfied, while leaders and senior specialists tend to be much more content.

How satisfied are you with your current job?

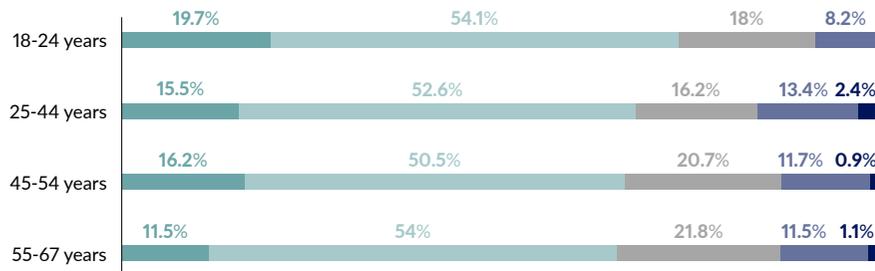


Who's satisfied with their current job?

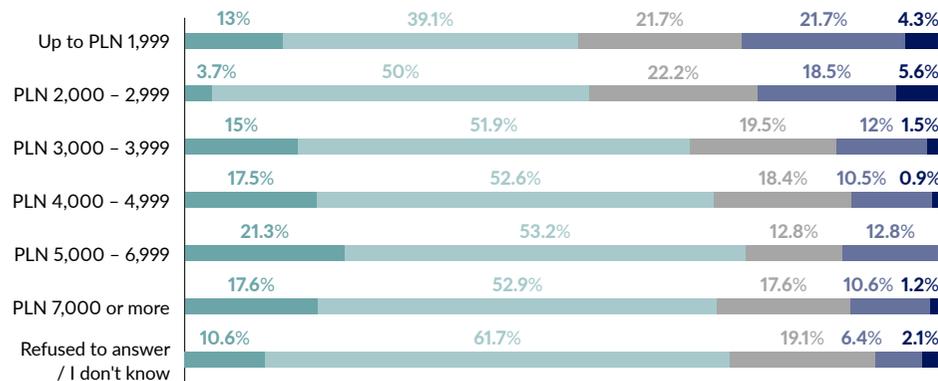
How satisfied are you with your current job?



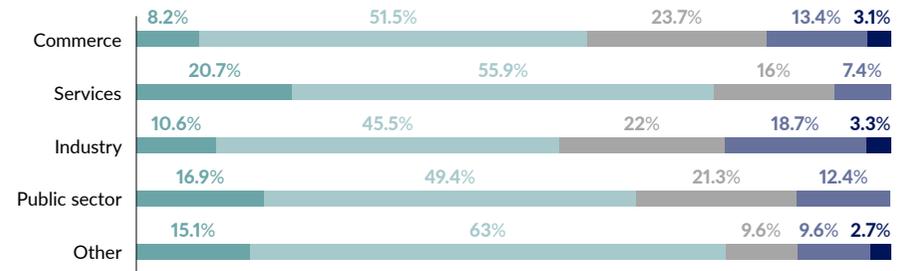
Job satisfaction across age groups



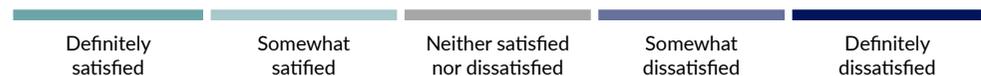
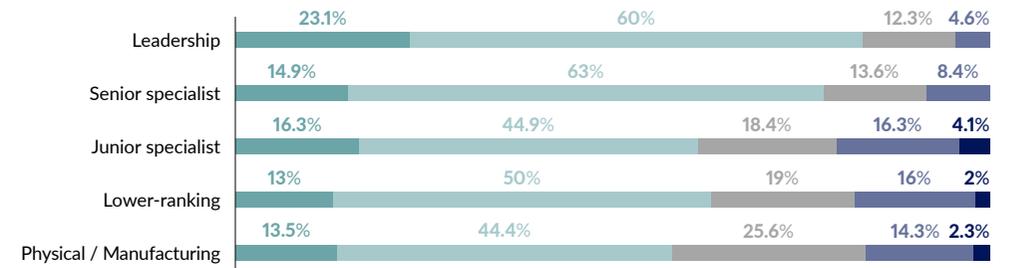
Job satisfaction across salary levels



Job satisfaction across sectors

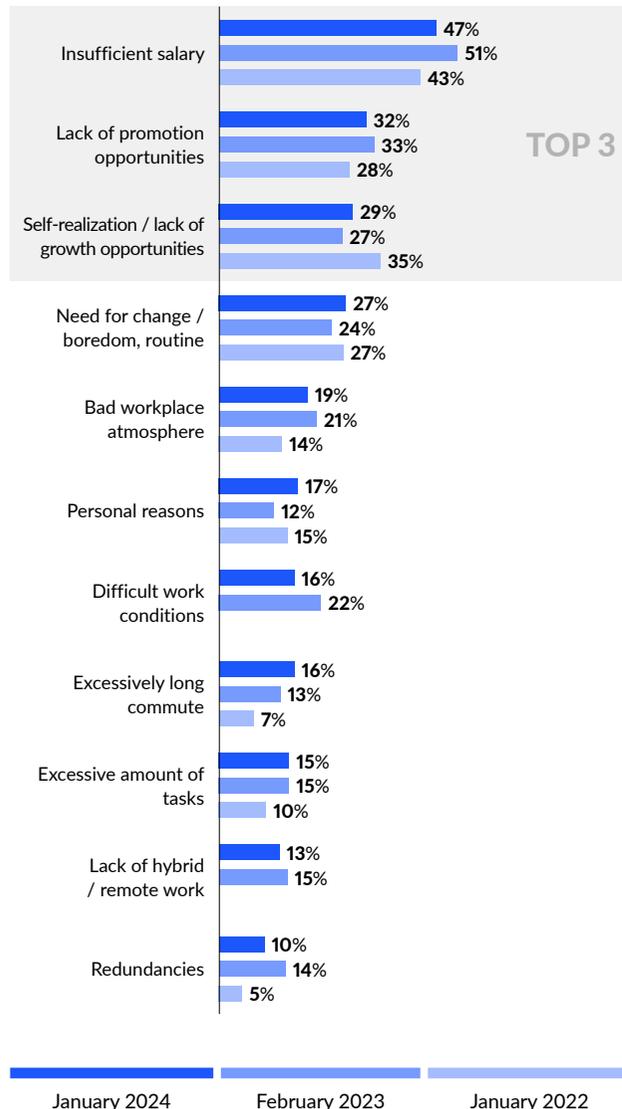


Job satisfaction across positions

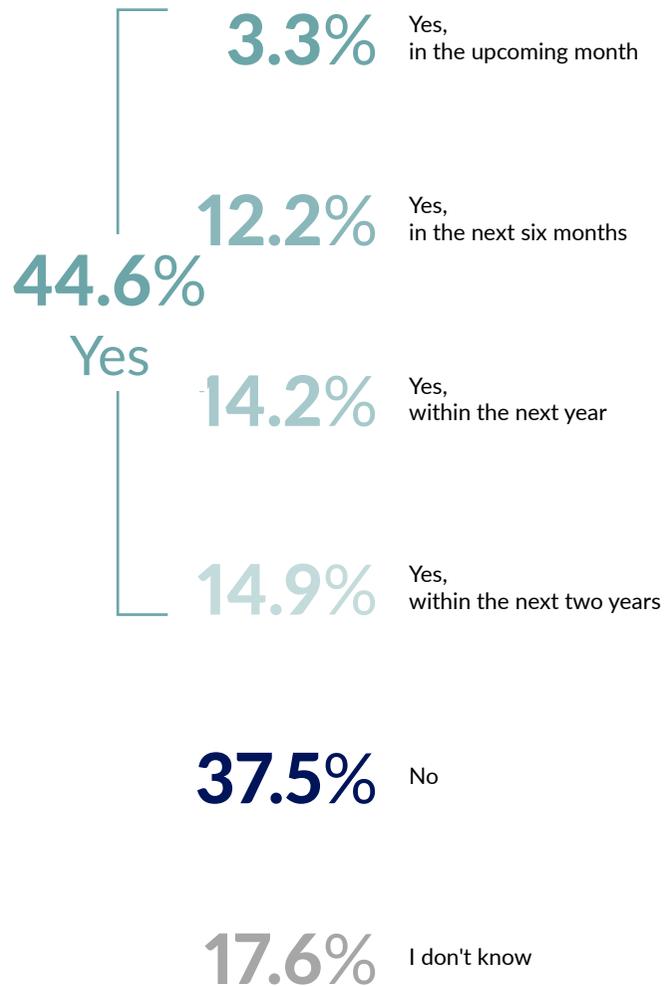


Reasons for seeking a new job

Why are you looking for a new job?*



Are you planning to change your current job?



Why are employees choosing to change their jobs?

The reasons are the same as last year – **47% of respondents want to quit due to low pay, 32% see no opportunities for professional growth and 29% seek better promotion opportunities.**

The financial aspects were pointed out primarily by the women (53% as compared to 40% of men). Furthermore, they were mentioned by half of the respondents aged 25-54. The dissatisfaction with low pay was most commonly pointed out by those earning between PLN 3,000-3,900 (63%) and working in commerce (64%). On the other hand, the managers (31%), manufacturing and physical workers (41%) were least likely to do so.

Undoubtedly, the workers care about further developing their professional careers. **The lack of promotion opportunities** has been pointed out to a similar degree by the employees of all industries and age groups. It bears mentioning that lower-ranking employees tend to be more likely to quit their jobs over this. This might suggest that much like in the case of seeking to increase one's pay, it's easier to obtain a higher-ranking position by changing one's workplace than getting a promotion within the current organization.

Lack of growth opportunities and the drive for self-fulfillment predominantly affect commerce and service sector employees. This issue was also more prevalent among women.

Routine, boredom and a need for change usually motivated the managers (35%), manufacturing and physical workers (32%) and men. It was by far the most common cause of resignations in the industrial sector (at 38%).

* Question answered by respondents planning to change their job. • Respondents could select multiple answers.

What motivates people to stay at their current companies?

The survey among people planning to change their jobs has shown that the **financial factors not only remain key for retaining employees**, but their importance has further increased since last year. **Pay raises (90%) and additional bonuses (85%)** remain strong motivators to remain in one's current company.

Aside from the financial aspects, **better opportunities for professional growth (75%)** and **better workplace atmosphere (75%)** have also proved important. Furthermore, the employees value initiatives ensuring the **work-life balance (72%)**.

Women tend to put greater emphasis on the offered pay, professional growth opportunities and workplace atmosphere. Flexible schedules and remote work are more important to them than men. As for the latter, aside from salary levels and growth opportunities, the men are paying attention to solutions to help ensure work-life balance.

The older employees are, the more emphasis they put on financial matters. In terms of retaining employees to stay at their current workplace, a **pay rise** would primarily motivate lower-ranking employees, but also the leaders. It would also prove quite important for those employed in the public and industrial sectors.

Satisfactory **professional growth opportunities and supporting work-life balance** would primarily motivate the older employees, aged 45-54. They are also quite important for the managerial Staff. The work-life balance in itself is also greatly valued by industrial workers.

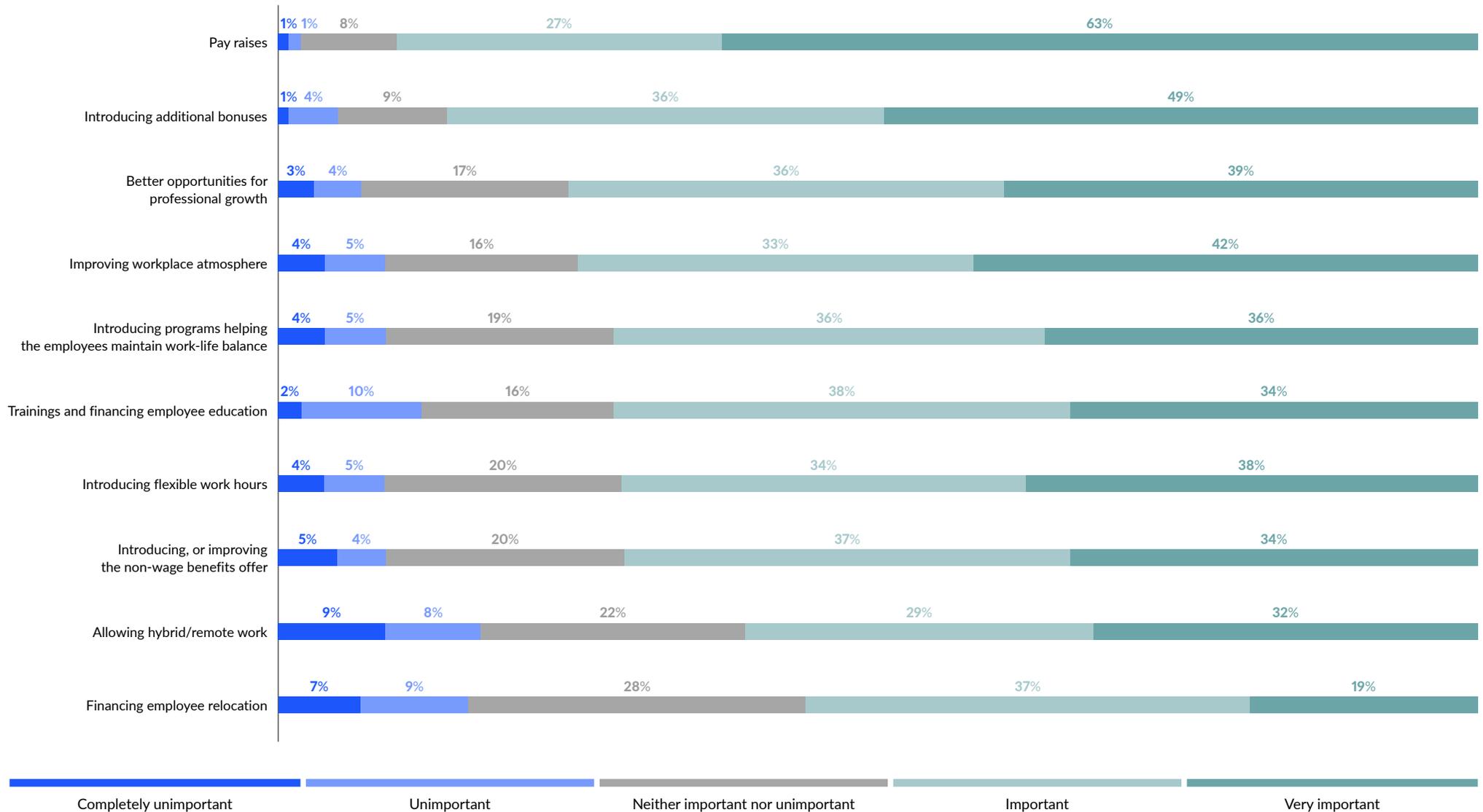
Introducing **remote and hybrid work** would help retain primarily managers and people aged 25-44 or 55-67.

When comparing this data with the measures introduced by companies to counteract employee turnover, we can notice that the employers aren't quite catching up to the employee expectations.

While salaries remain key in motivating employees, it's becoming increasingly clear that they're not the only factor influencing their workplace satisfaction and retention. Alas, despite the growing awareness of these needs, **there is still a notable misalignment between employee expectations and what the employers are actually offering.**

What motivates people to stay at their current companies?

What initiatives would have a notable impact on your willingness to stay at the current workplace?



*Question answered by respondents planning to seek a new job.

Non-wage benefits

Comparing employee expectations and available benefit offers unveils certain discrepancies. While Christmas vouchers, insurance packages and sports cards are among the most popular non-wage benefits (at, respectively, 30.2%, 24.1% and 13.3%), except vouchers they aren't a priority for the majority of employees.

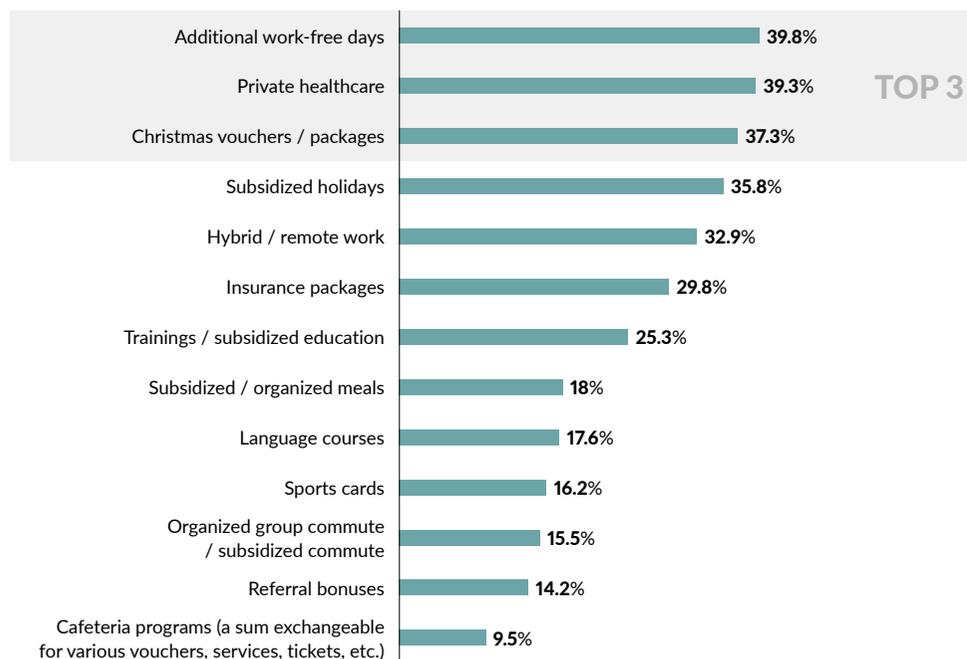
The most requested benefits include additional work-free days (39.8%) and private healthcare (39.3%). Christmas vouchers and packages are appreciated by 37.7% of workers, while 35.8% value holiday subsidies. Insurance packages only end up sixth (29.8%), while sports cards are only important to 16.2% of respondents.

The benefits held in higher regard by women than men include private healthcare (42.5% vs. 36%), Christmas vouchers (40% vs. 34.5%), subsidized holidays (37.1% vs. 34.5%) and remote or hybrid work (37.1% vs. 28.7%). Men are more interested in subsidized commutes (18.2% vs. 12.7%), workplace meals (20.4% vs. 15.6%) and referral bonuses (16% vs. 12.4%).

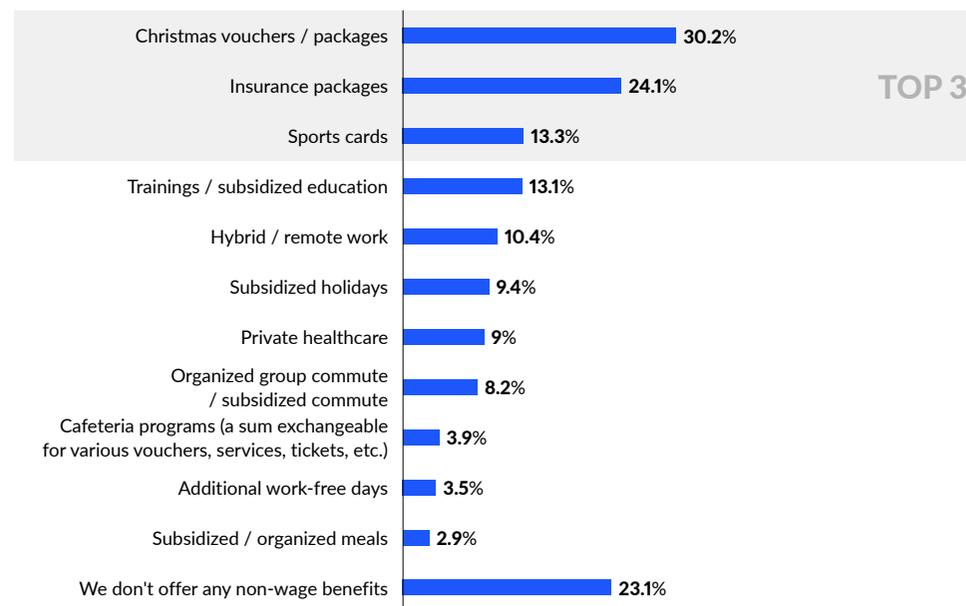
It bears mentioning that despite the media, especially HR industry publications, increasingly often treating non-wage benefits as a standard aspect of new job offers and discussions focusing on new, innovative benefits to further increase the effectiveness of employee acquisition, for many businesses the reality is quite different. Almost a fourth of all employers do not offer any non-wage benefits. In the case of small businesses, this number is even higher, at 29%. For comparison, among the largest enterprises the same can only be said about 16% of businesses.

Presumably, this is largely caused by limited financial means, but other reasons might include a lack of awareness or conviction among the employers as to the importance of non-wage benefits for employee satisfaction and motivation, or lacking knowledge and experience in the area of organizing benefit systems.

Which employee benefits are most important for you?



Which employee benefits are you offering, or planning to offer?



Professional growth opportunities and the appraisal of employers

How important are professional growth opportunities in the appraisal of employers?

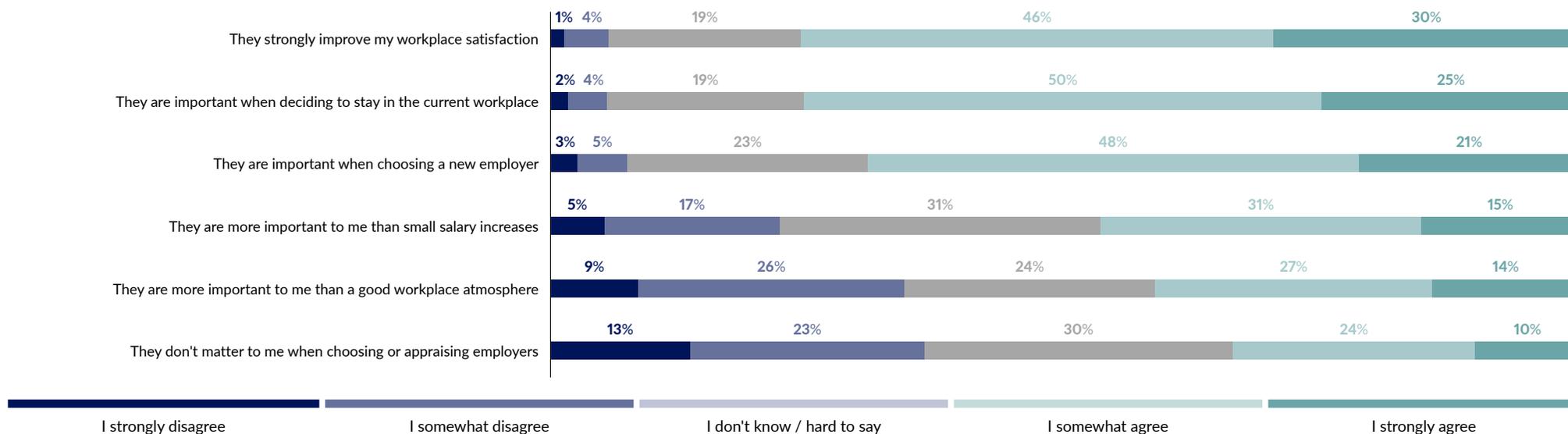
The professional growth opportunities provided by a company are key for its appraisal by employees. 76% of our respondents declared that they have a **great impact on their workplace satisfaction** and 75% have agreed that **they're an important factor when choosing to stay at the current workplace**. For 69% of employees, growth opportunities are highly important when choosing a new employer. Only 34% admitted that this aspect doesn't have much impact on their appraisal of companies.

Interestingly, 46% of employees claim that the professional growth offer is more important for them than slight salary increases. 22% of respondents disagreed. However, the workers aren't quite as keen to prioritize growth opportunities over a good workplace atmosphere – for 41% of them, self-development is more important while 35% place more weight on workplace atmosphere.

The importance of professional growth increases with both one's age and position. Senior specialists and managers are more likely to take this into account when appraising current and future employers and these aspects are tied more strongly to their workplace satisfaction. The lower one's pay, the more important available growth opportunities become for continued employment in one's current workplace. When seeking a new job, personal growth is most important for those with secondary and tertiary education.

How are the professional growth opportunities offered by an employer impact your appraisal and willingness to work for them?

Rate the following statements on a scale from 1 to 5, with 1 meaning „I definitely disagree” and 5 meaning „I definitely agree”



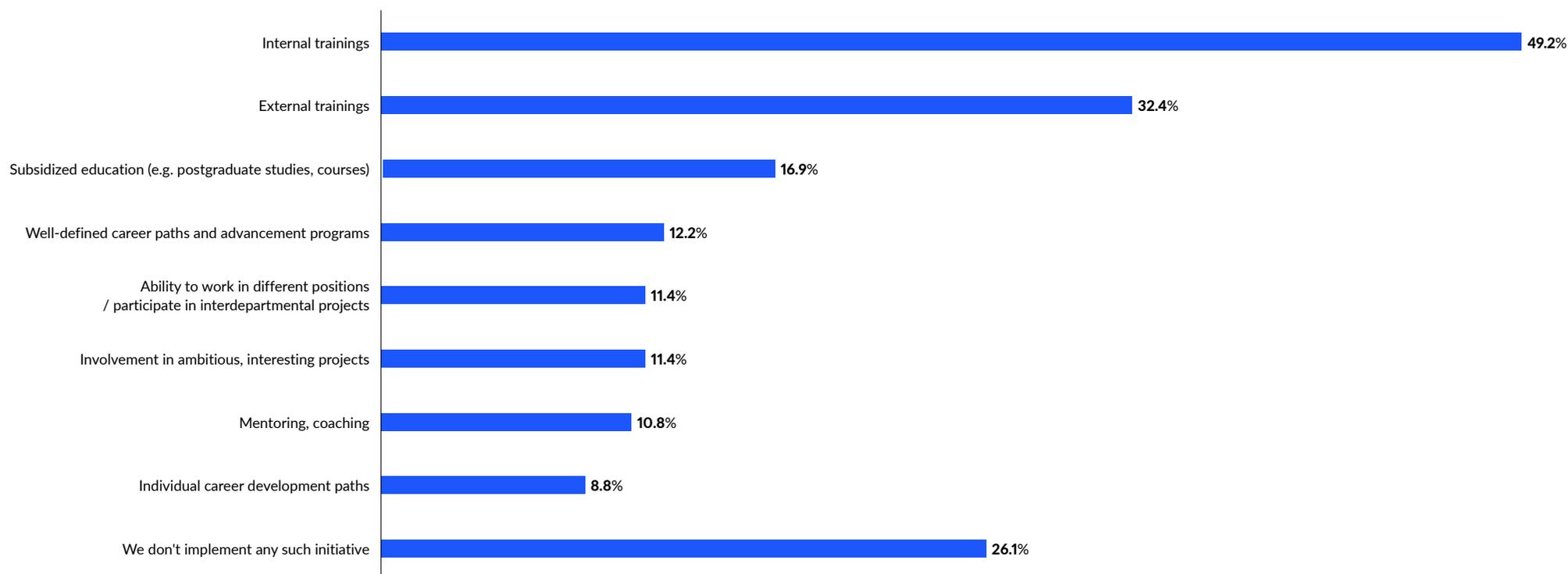
Respondents could select multiple answers

How are companies supporting the professional growth of their employees?

The businesses are taking various measures to support the professional growth of their employees. **Almost half of all organizations offer internal trainings (49.2%) and a third facilitates external trainings (32.4%). Almost 17% choose to subsidize employee education.** Other forms of support, such as well-developed career paths, advancement programs, involving employees in ambitious projects, mentoring or providing the opportunity to work in different positions are being implemented by one company in ten.

However, 26.1% of employers don't implement any initiatives to support the professional growth of their teams. This is especially true of the smallest entities (at almost 32%), commerce (30.1%) and the industrial sector (27.3%). **The size of an enterprise has a notable impact on its ability to support the professional growth of its employees.** Internal trainings are organized by as many as 61.2% large and 51.2% medium-sized enterprises. Among small companies, only 35.3% implement such initiatives. However, they are just as likely as their larger counterparts to utilize external trainings (34.7%, as compared to 32.9% in large enterprises). On the other hand, they are much less eager to subsidize employee education (11.2%, as compared to 18.8% in large and 20.6% in medium-sized companies). Then looking at various sectors, service companies are offering the best growth opportunities while the industrial sector fares worst in this regard.

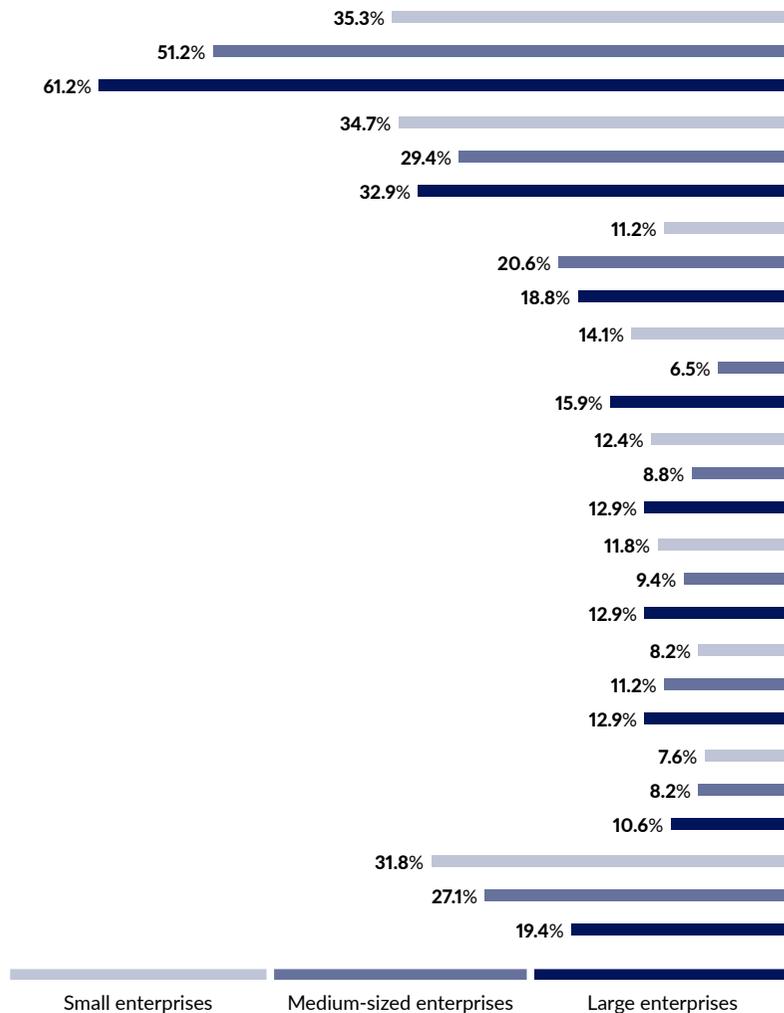
What opportunities for professional growth is your company offering its employees?



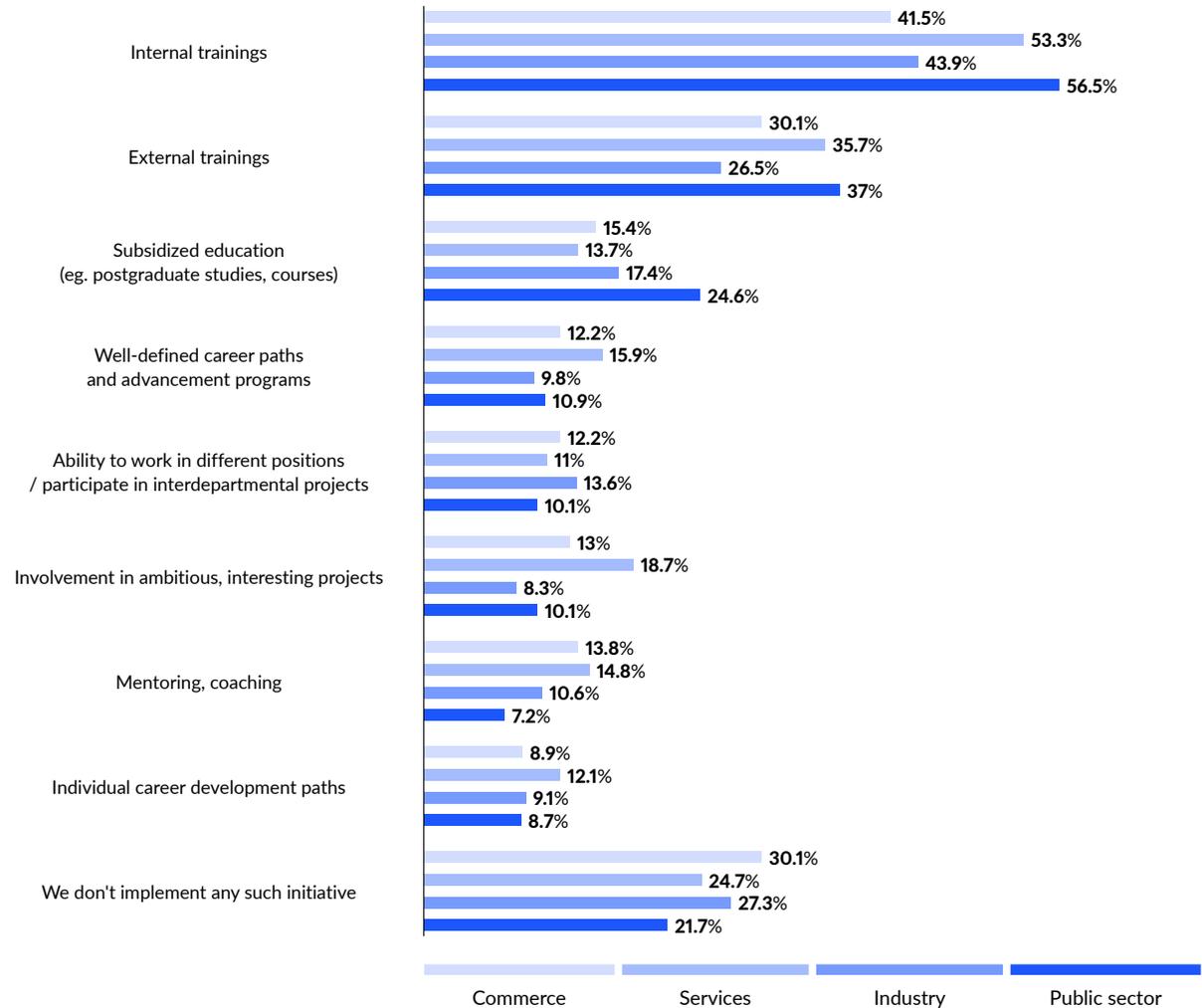
Respondents could select multiple answers

How are companies supporting the professional growth of their employees?

Support for employee professional growth across company sizes



Support for employee professional growth across sectors



Respondents could select multiple answers.



Joanna Kupiec

People & Culture Director, Duon Dystrybucja

Effective professional growth requires an individual approach and transparent communications

In my opinion, the greatest challenge ahead of businesses, in terms of ensuring the professional growth of employees, is meeting mutual expectations. According to research, most of us – regardless of gender, age, experience or the scope of obligations – would like to keep growing. At the same time, my own recent experiences in recruitment suggest that every candidate has their own definition of growth, befitting their individual needs and earlier experiences (or lack thereof). Thus, transparently presenting concrete opportunities provided by the company is important as early as during the recruitment process. If a candidate's expectations prove higher than what can be offered, we should be open about it and avoid building false expectations that we later won't be able to fulfill. The questions of candidate expectations and their understanding of growth should be treated as essential in the recruitment process.

When talking about challenges in the development of our current employees, the trick lies in the individual approach. As a company, we can facilitate it through having development talks with our employees. These meetings allow our workers to express their expectations so that their managers can address them. Professional growth shouldn't be divorced from the ongoing competence analysis, or the potential of our workers. It should also be linked to the organization's overall strategic goals. In this regard, consistency and a well-defined action plan are crucial.

The employee and their manager are both responsible for this. The manager needs to listen to employee needs and expectations and decide how their response to them can lead to business results.

In the scope of employee responsibility, the most important factors include the willingness to take risks and make increased efforts – without that, even the greatest training, development initiative or support tools won't guarantee the expected results. I'm certain that regardless of one's budget or the size of the organization, each business is capable of supporting its employees' growth. Personal development doesn't mean merely language lessons or internal specialist training, which tends to dominate the rankings. It's also crucial for us, as leaders, to utilize our experience and market insight of HR specialists to first define personal growth and the related expectations, and then ensure all current and future employees understand this definition.



Maciej Wiśniewski

Country Manager, Bona Polska

Investing in employees – the art of recognizing potential

Even 10 years ago, I would say that an employee's professional growth is an investment, but nowadays the labor market looks very different. I am no longer certain of this. This is largely due to new generations entering the market, new technologies supporting work, the emergence of new, attractive professions or even just the shift in values considered to be important. On one hand, a constant, cohesive and loyal team can provide its manager with a sense of stability when making strategic decisions, but on the other hand, creating such a team in the first place is increasingly difficult. Nowadays, employers should be more cautious when deciding to invest in their employees. Of course, it is still necessary and justified, but there is no guarantee it will pay back. I believe it's neither one's competences nor willingness to learn, but a person's character that is decisive in choosing whether to invest in their growth.

The employees can be disloyal, even when provided with good work conditions, good pay, social benefits, trainings, etc. The willingness to change one's workplace is constantly growing and does not have to be motivated by dissatisfaction – but also curiosity, the drive to experience something new, or new opportunities that appear enticing, regardless of how they'll actually turn out.

In these circumstances, a graduation diploma, competences or professional experience are important from the perspective of completing current tasks. Still, the decision to invest in the employees has to be backed by meticulous observation. One ought to establish who feels truly at home in the company, identifies with it, proposes new improvement initiatives and doesn't show the signs of restlessness. It's worth working together with people, but not everyone deserves it.

Today, the human capital strategy requires a new approach. The job market is changing, necessitating a new approach to the employees. One will definitely have to pay closer attention and spend more time with them. It's the only way of choosing those worth investing in.

Employee preferences concerning the support for their professional growth

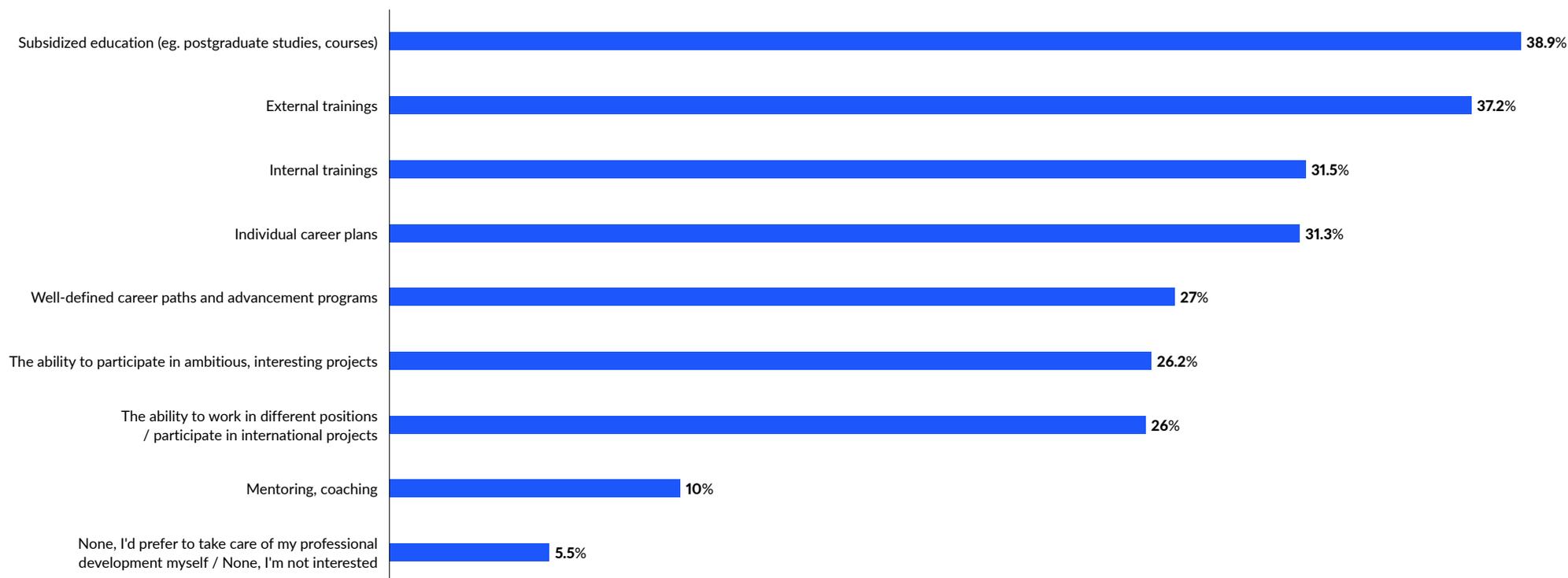
The employees are eager to utilize their employer's support in the area of professional growth, but their expectations tend to somewhat differ from what is usually offered.

The most desirable forms of support include education subsidies (38.9%) and internal trainings (37.2%). Internal trainings attract slightly less interest (31.5%). Perhaps the external forms of education are perceived as more valuable and external experts appear more competent and independent. Another important factor likely contributing to this phenomenon is the employer's financial investment, which could be interpreted as a reward for the employee. This in turn leads to a better perception of and eagerness to utilize such trainings.

The employees also appreciate the value of individual development planning (31.3%) and clearly defined career and promotion paths (27%). A fourth of all employees want to grow professionally, participating in ambitious projects or trying themselves in various positions.

Supporting professional growth is an important factor contributing to the attractiveness of an employer. When planning such initiatives, businesses should first consider the needs of various employee groups and their own business goal and only then select the right form of support.

What forms of support for professional growth support would most like to utilize?



Employee preferences concerning the support for their professional growth

Employee preferences as to the forms of professional support are notably different across various age groups. **The younger workers, who usually have less experience and occupy lower-ranking positions, are showing strong interest in continuing and subsidizing education, promotion opportunities and mapping out their professional growth. Older workers are more likely to appreciate trainings, focusing on updating and filling the gaps in their pre-existing knowledge.**

Notable differences in preferences as to the forms of supporting professional growth are also present between the various age groups. **Lower-ranking employees** tend to place **greater emphasis on financial support for education and training and planned career paths**. The higher one's position, the more interested they are in trainings carried out by external experts. It bears mentioning that subsidizing education is a form of supporting all employees, regardless of their position, are appreciating. The **preferences of managers** are also of interest: **they are clearly invested in continuous growth**. They are interested in subsidized education, participation in ambitious and interesting projects and promotion opportunities.

Those employed in the commerce and public sectors prefer subsidized education (45.7% for commerce and 42% for public sector, respectively). In the **services sector**, the attitudes are similar (35.9%), despite an equally strong preference for external trainings (35.9%). For the **industrial workers**, internal trainings has proven to be most important (at 40.9% – the highest result among all sectors), with individual career paths also being greatly valued (36.5%). The ability to join ambitious and interesting projects is most important for commerce and public sector employees. Industrial and service workers, on the other hand, prioritize the ability to work in different positions, in different departments or interdepartmental projects. The differences are also visible between genders. The women are more fond of subsidized education and internal trainings (although both tend to be top picks for both genders). Men prefer trainings, well-defined career paths and advancement programs. They are also more interested in working in different positions and participating in interdepartmental projects.

Interestingly, the interest in various forms of supporting professional growth also differs depending on one's residency. External trainings are increasingly important for those living in large cities. People from smaller towns tend to prefer their employers to organize trainings themselves. They are also more interested in working in different positions or in different departments, as well as more eager to join ambitious projects. On the other hand, larger cities tend to place more weight on various forms of coaching and mentoring.

**Paweł Prociak**

Managing Director, Board Member, Wyser

**Karolina Popiel**

Principal - Human Resources, Wyser

In the best companies, the managers never stop seeking knowledge

The development of leaders as an element of a holistic approach

The managerial staff has a crucial impact on the overall success of the organization and the ongoing growth of its leadership is necessary to ensure the stability, or acceleration, of this process. Therefore, future capabilities for the professional development of the managers should be taken into account as early as during candidate acquisition. Their professional growth should be supported by strategic planning to ensure alignment with the organization's overall goals.

The task of a future employer lies largely in understanding the development needs from both their own perspective and the broader outlook of organizational improvement.

With this in mind, we assume that leaders play an important role in shaping the organizational culture and acting as an example to other employees. Their involvement in professional growth will inspire others to take similar initiatives. Broadening one's knowledge and improving one's skills will help make better and faster decisions. Thanks to the new information, they will be able to stay ahead of new trends and technologies and approach new business challenges with an open mind.

Thus, offering future leaders a chance for professional growth becomes key, as it constitutes a vital part of a holistic approach to ensuring the long-term goals of conscious organizations.

Leader development from an individual perspective

A mature leader refuses to stand still – the sheer amount of changes taking place in the market does not allow them to do so. They develop their competences in a conscious director, gather experience and learn with each and every decision and project. Therefore, they will greatly value an offer foreseeing the opportunities for future professional development – especially if they're of high quality (eg. MBA, trainings and courses on renowned universities). According to the report, almost 40% of people in leadership positions would prefer their employers to subsidize their education, such as postgraduate studies. A fourth of all respondents consider the ability to work on ambitious and interesting projects to be the single most interesting opportunity for growth.

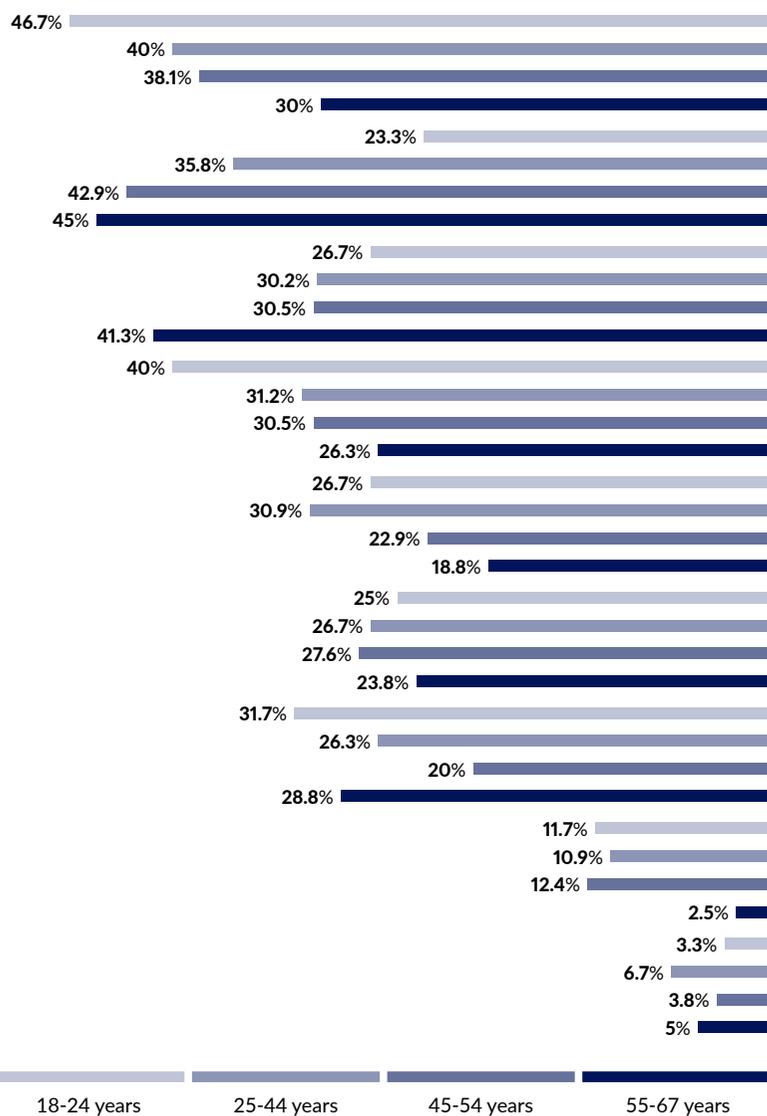
A conscious manager knows when their leadership is effective. Professional growth allows them to perfect their leadership skills such as communication, team management, conflict solving and decision making – all contributing to their eventual success.

A leader must also be able to follow the ever-changing market requirements. Thus, the managers are planning their own developmental goals to remain competitive in the job market.

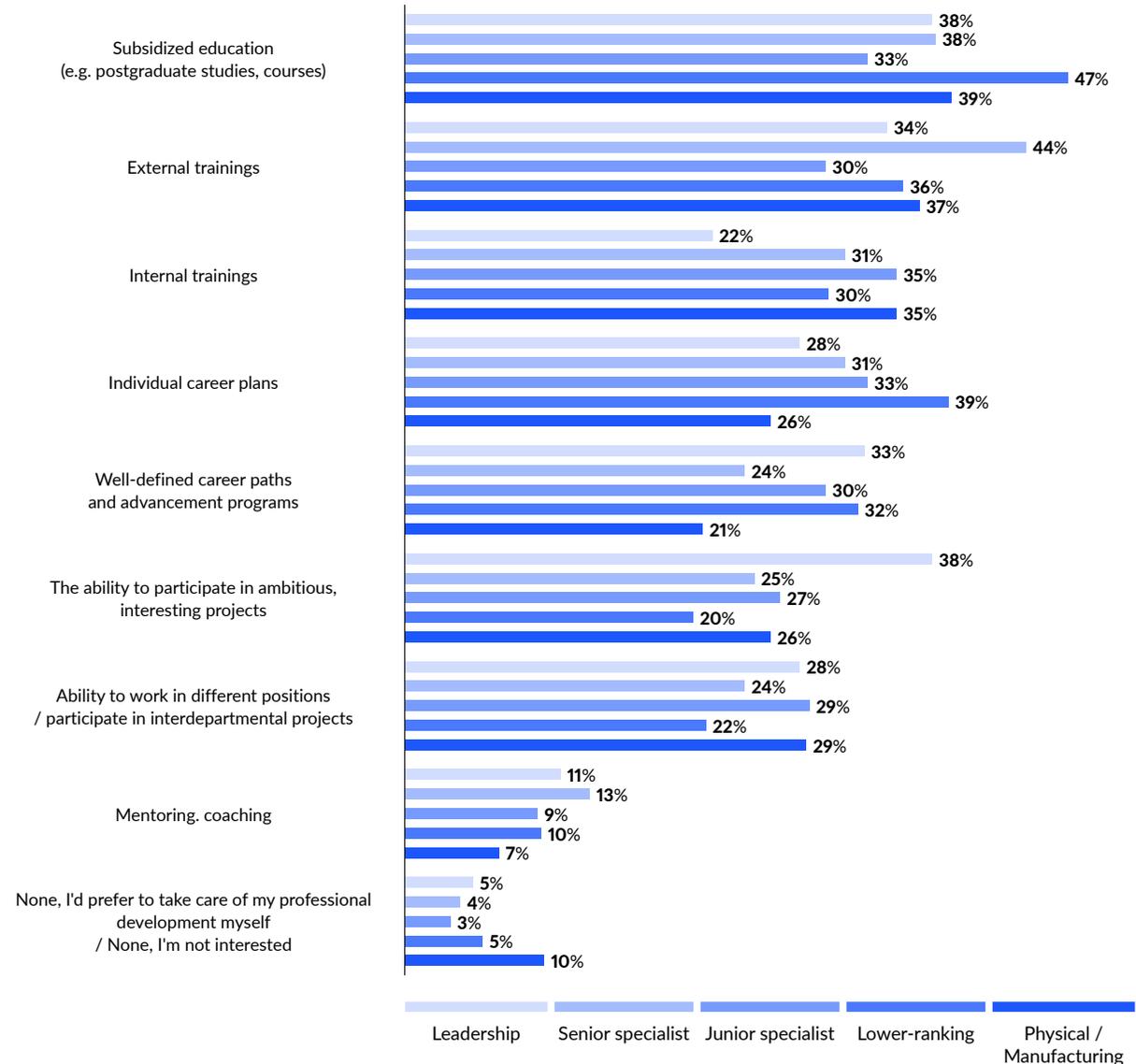
As a result, professional development proves incredibly important for a manager's long-term success and to reach both professional and personal satisfaction.

Employee preferences concerning the support for their professional growth

What forms of support for professional growth support would most like to utilize?



What forms of support for professional growth support would most like to utilize?



What are the employees' preferred areas of development?

According to our research, **the employees are interested primarily in improving their language skills (49.6%)** and broadening their **professional qualifications through trainings pertaining to their current profession (46.2%)**. Moreover, 41.6% of the respondents have expressed interest in obtaining digital skills, including the use of specific software, tools, programming and data analysis.

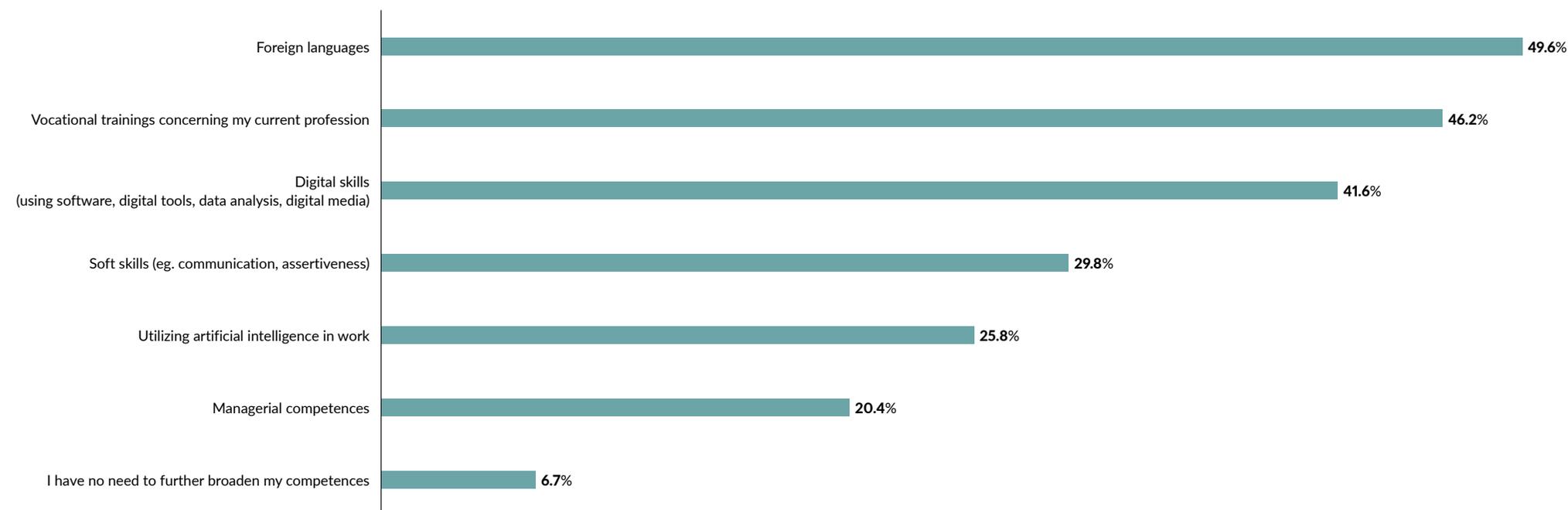
The interest in learning **foreign languages** is strongest among young people (aged 18-24), those with secondary education and women. While the willingness to learn new languages is fairly strong in all sectors, industrial workers have shown the strongest interest in it.

Vocational trainings pertaining to one's current profession (46.2%) is the second most popular choice. Their draw is strongest among men and the 25-54 age group. This form of professional development is valued more by junior specialists, physical and industrial workers. It also bears mentioning that the interest in vocational trainings is higher among small-town residents and decreases in importance as one's earnings increase.

Digital skills are of particular interest to workers aged 18-44 with secondary or tertiary education and women. This area was most often mentioned by commerce workers, but the overall interest held strong in all researched industries.

30.6% of all employees would like to learn more about the **opportunities to utilize artificial intelligence**. It's of particular interest to the 45-54 age group (30.6%), including both men and women. People in managerial positions are the most eager to develop in this direction (43%). The interest was also higher among the residents of large cities (33%).

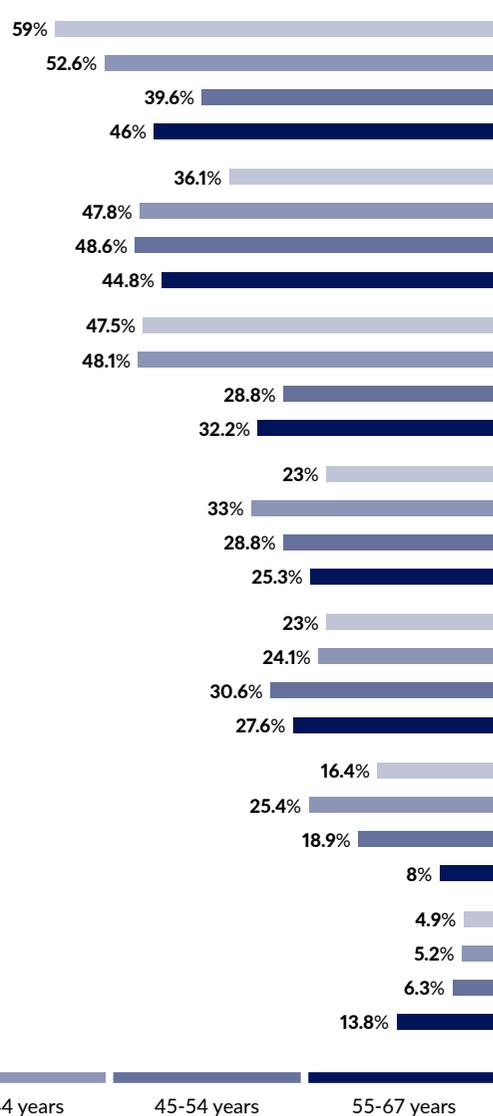
What are your preferred areas of development?



What are the employees' preferred areas of development?

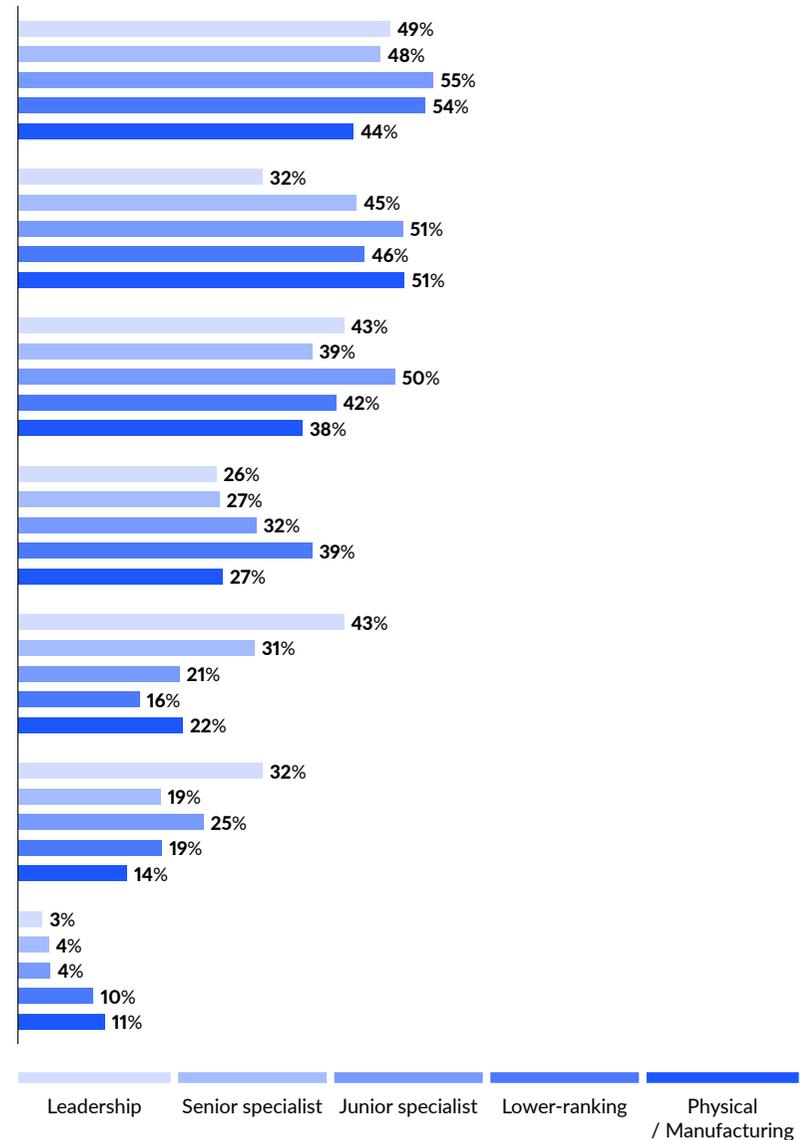
What are your preferred areas of development?

Age groups



What are your preferred areas of development?

Position



Respondents could select multiple answers.

Gi Group Holding – the global HR services ecosystem

Gi Group Holding is one of the global HR services providers. The business recruitment ecosystem in Poland is formed by three individual, but mutually supportive brands – Gi Group, Wyser and Grafton Recruitment, which is also an authorized provider of Thomas International tools in Poland. Combined, they allow Gi Group to offer the full scope of HR services, providing businesses with effective solutions fit for their current needs.

Gi Group's overarching goal is to actively co-create and promote a sustainable, improved and satisfying global labor market that reflects the ever-changing needs of companies and candidates.

Currently, the Group is servicing over 25,000 customers worldwide, generating an income of EUR 3.6 billion in 2022. We employ over 9,000 people and remain active in 37 countries across the entire Europe, the APAC region and both Americas.



ONE OF THE LARGEST HR COMPANIES

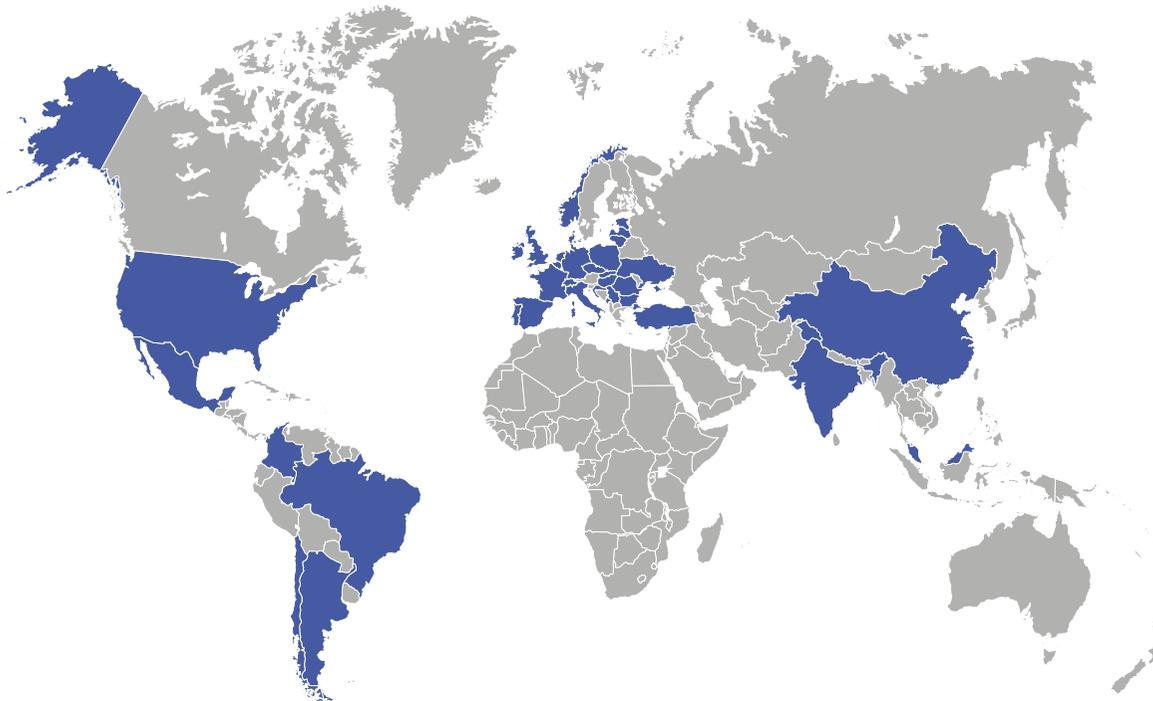


19th
place
GLOBALLY



9th
place
IN EUROPE

according to Staffing Industry Analysis 2023



DIRECT PRESENCE IN 37 COUNTRIES

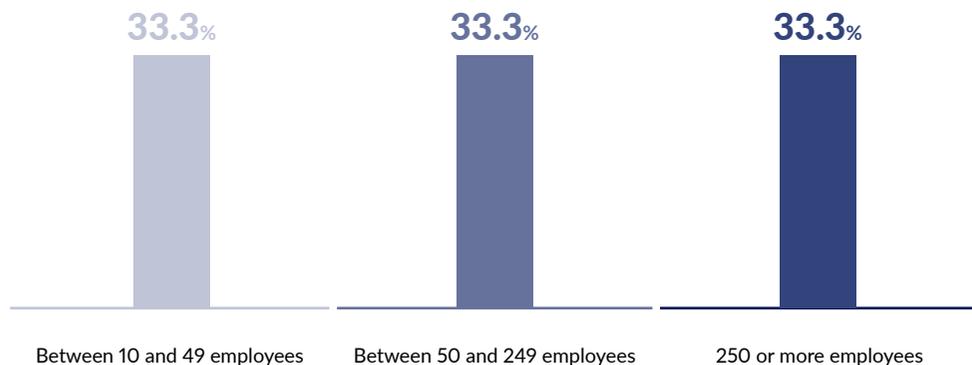
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|-----------|---------|---------------|-------------|----------------|
| Argentina | Czechia | Italy | Netherlands | Switzerland |
| Belgium | Denmark | Lithuania | Norway | Turkey |
| Brazil | Estonia | Liechtenstein | Poland | Ukraine |
| Bulgaria | France | Luxembourg | Portugal | United Kingdom |
| Chile | Germany | Latvia | Romania | United States |
| China | Hungary | Malaysia | Serbia | |
| Colombia | India | Mexico | Slovakia | |
| Croatia | Ireland | Montenegro | Spain | |

Research methodology

	Research goal:	<p>The primary goal of this research was to investigate the perception of Poland's labor market from the perspectives of both employers and their employees.</p>
	Research method:	<ul style="list-style-type: none"> • Employers: computer-assisted phone interviews (CATI) with the representatives of small, medium-sized and large enterprises operating in various industries. • Employees: on-line surveys (CAWI) utilizing the SW Panelonline survey panel
	Research sample:	<ul style="list-style-type: none"> • Employers: the research encompassed 510 surveys with the representatives of small, medium-sized and large enterprises operating in various industries. • Employees: the research encompassed 550 surveys with a representative sample of Poles of all genders
	Respondents:	<ul style="list-style-type: none"> ■ Employers: <ul style="list-style-type: none"> • Representatives of small enterprises (10 – 49 employees): N=170 • Representatives of medium-sized enterprises (50 – 249 employees): N=170 • Representatives of large enterprises (powyżej 250 employees): N=170 • Representatives of commerce sector enterprises: N= 123 • Representatives of service sector enterprises: N=182 • Representatives of industrial sector enterprises: N=132 • Representatives of public sector enterprises: N=138 ■ Employees: <ul style="list-style-type: none"> • Poles aged 18-67, in accordance with the statistical distribution of genders, age and place of residence by size
	Date of implementation:	<p>Employers: 03/02 – 09/02.2024</p> <p>Employees: 9/02 – 14/02.2024</p>

Demographic structure of research sample - employers

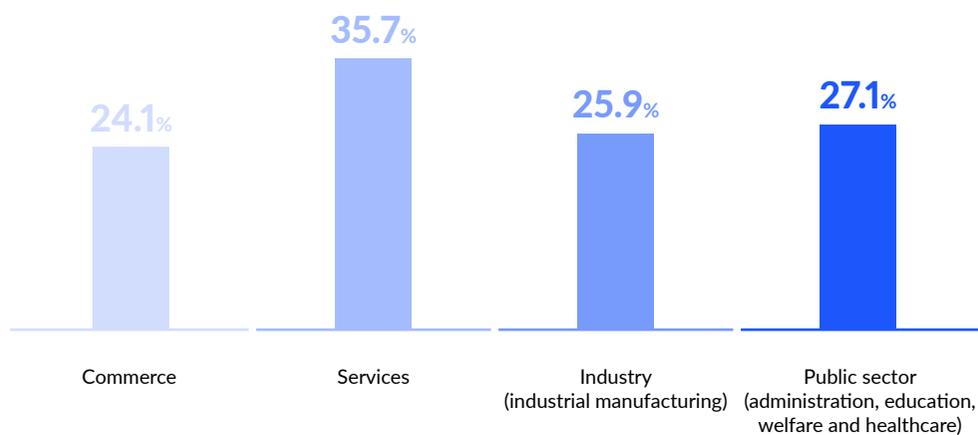
Company size



Province

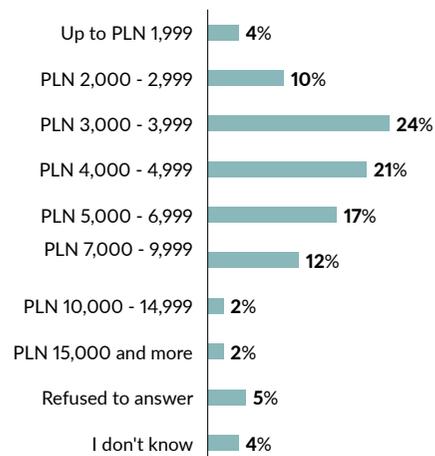


Sector

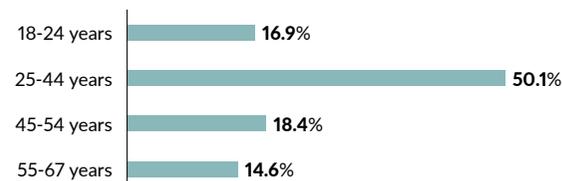


Demographic structure of research sample - employees

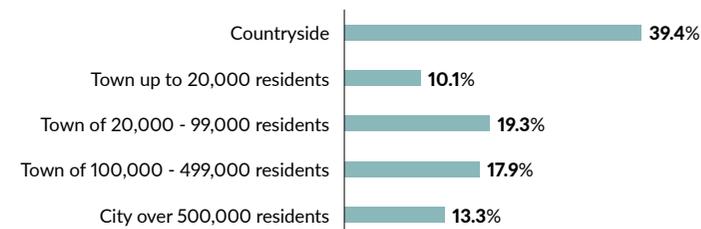
Income



Age



Size class



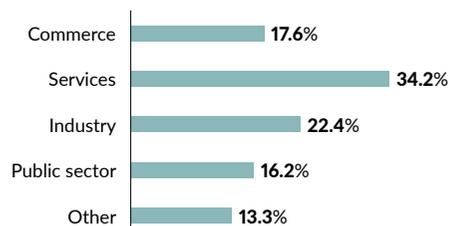
Gender



Province



Sector



Stanowisko



SUBSTANTIVE DEVELOPMENT

SW Research Agencja Badań Rynku i Opinii
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