

# **12th meeting of the Voorburg Group on Services Statistics**

**Copenhagen  
15-19 September 1997**

## **The provision of personnel services. A first overview of the French experience**

session 2

Céline ROUQUETTE

*Abstract: This paper presents a pilot survey on provision of personnel services made in France in early 1997. First, it gives an overview of the NACE Rev.1 group at stake, and of the industries surveyed. Then, it explains the methodological choices and presents the questionnaires that were used for the survey. Finally, it presents two kinds of results : an analysis of the response behaviour of the sample, and a few statistics based on the pilot survey and on the Business Annual Survey.*

# **INTRODUCTION**

---

The selection and provision of personnel services have a growing importance in the economy. They have all the more developed since recruitment and placement have become strategic in a context of unemployment and development of peculiar and precarious kinds of job contracts.

The NACE Rev.1 74.50, which gathers all those "selection and provision of personnel services", comprehends miscellaneous industries, as different as temporary work services, placement services, recruitment services, carrier assessment consulting, and so on, and so forth. They are not equally developed in the OECD countries, since the legislation in force authorise here what is forbidden there.

This address is aimed at setting out the background, methodology and conclusions laid by a pilot survey on provision of personnel services (NACE Rev. 1 74.50) that have been made in France in the early year 1997. First, it seems necessary to explain exactly what is comprehended in this sector of the NACE, and what has been selected for the survey at stake. Then we will review the methodological choices that have been made in France to carry out the survey. Finally, we will lay the stress on a few interesting results.

## **I. THE SECTOR 74.50 OF THE NACE REV. 1.**

---

### **A. JURIDICAL BACKGROUND.**

In most of the developed countries, the legislator has intervened to regulate the activities of selection and provision of personnel in the seventies. The intervention of the law was aimed at avoiding that firms might evade the social laws on employment, and may practise illegal traffics of labour force.

Moreover, the International Labour Organisation has passed a convention that forbids the existence of private placement profit businesses. In the Convention number 96, there are two options : the general frame of the convention stipulates that the states must maintain a free and public placement service, and that they must forbid private placement offices ; the flexible option allows the countries to let private placement offices operate, providing their activity be regulated. Some countries have not adhere to this convention, because they consider it is contrary to the principles of

liberty in force. A few countries have chosen to adhere to the flexible option, the rest have chosen to adhere to the general frame of the convention. In fact, as far as laws on employment are concerned, we can establish a distinction between an "Anglo-Saxon" model, which corresponds roughly to the countries that have not adhere to the convention or have adhered to the flexible option, and a "Latin" model, that corresponds to the countries that have adhered to the general frame of the convention.

### *1. The Anglo-Saxon model.*

We gather under this denomination all the countries, be they Anglo-Saxon or not, where the social laws are quite similar to those in force in the United Kingdom or the United States of America. Those social laws are characterised by the liberty of the employer to sign on and sign off at will its employees and the absence of a general system of protection of the workers. There is no restriction about the types of provision of personnel services a firm can provide either. Most of those countries, such as the United States, the United Kingdom or Brazil, have not adhered to the convention number 96 of the International Labour Organisation. A few others, like Japan and Ireland, have adhered to the flexible option of the convention, that authorises the existence of private placement offices, provided they be strictly regulated. The United States on the one hand, and Japan, on the other hand, are quite good examples of that Anglo-Saxon model.

In the United States, the employer is always free to dismiss an employee, without any cause ; that is what is called "employment at will". Therefore, there are few differences between fixed term or temporary work services contracts on the one hand, and unlimited duration contracts on the other hand. The real distinction in the employment market is to be found between the workers who are protected by a trade union that ensures them advantages, and those who are not. As far as temporary work is concerned, there is no distinction between placement offices and temporary work services offices : the latter do not have a special status regarding the law. The same phenomenon can be found in New-Zealand, Ireland, or Australia. In the United Kingdom, the temporary work agencies are regulated by the 1973 "Employment Agencies Act", which regulates all the employment agencies (head hunting, placement of artist, placement of housekeepers, seasonal placement, temporary work services). In these countries, there is no specific definition of what are temporary work services.

In Japan, the difference lays between a kernel of workers that benefits of life employment, better wages, and all kinds of advantages, which represents roughly 30% of the employees of a firm, and precarious workers who do not have access to those advantages. The precarious aspect of a job is not linked to a fixed term of the contract. Strategic posts which imply a lot of responsibilities are more likely to be life jobs. In Japan, temporary work services are allowed, but in order to strictly respect the Convention n°96, the temporary workers cannot be signed on when their temporary contract ends. This adds to the precariousness of the temporary worker's status, and draw some limits to the development of temporary work services.

### *2. The Latin model.*

In the countries characterised by a Latin model, the activities of selection, recruitment and placement of personnel are quite restricted. For instance, the placement can not be made by a profit business, but only by a public administration. Therefore, only a few types of services, such as temporary work services or recruitment or outplacement consulting, are authorised. This is often seen by the Anglo-Saxon model countries as an hypocrisy, since the border between the placement, which is illegal, and the provision of personnel services, such as temporary work, recruitment consulting or outplacement consulting, becomes narrower and narrower, especially if we consider the fact that approximately 30% of the temporary contract are renewed as "normal" contracts at the term of the temporary contract. But still, this legislation efficiently protects the workers against several types of abuses.

All the countries that have adopted a Latin model have adhered to the Convention number 96 of the International Labour Organisation. In Europe, it is the case of France, Germany, Belgium, Spain, Finland, Italy, Luxembourg, Norway, Sweden, and the Netherlands. In all those countries, the placement is then a monopoly of the administration, or at least it should be so.

Those countries are not equal as far as temporary work is concerned, though. Indeed, the International Labour Organisation's attitude towards temporary work agencies is not very clear. The International Labour Bureau have decided in the sixties that profit temporary work services should be considered like a profit placement, and thus forbidden as well as the permanent placement. Several countries, such as Sweden, Greece, Italy and Spain, followed that advice and banned all types of placement, including temporary work services. In Greece, Italy and Spain, the provision of temporary workers was tolerated though. In Italy, for instance, there are no temporary work services offices, but some firms do provide temporary workers : services businesses, free-lance workers associations, workers co-operatives. In Greece, the provision of temporary work services is ensured by some special departments inside services businesses.

On the contrary, most of the countries considered that the confusion between placement and temporary work was not justified, and temporary work services were maintained. Those countries asserted that in the interim relationship, the link between the temporary work agency and the temporary worker subsists throughout the temporary contract, even if the temporary worker obeys to and works for the user firm. In particular, the temporary work services office is responsible for the temporary worker. In the countries where the provision of temporary workers is allowed, there is a strict regulation and a definition of the temporary work services.

## **B. THE CONTENTS OF THE SECTOR IN PRACTISE.**

The international legislation on classification and the European jurisprudence have drawn some limits to the sector 74.50 of the NACE Rev. 1. Still, there may subsist some doubts. The sector is supposed to comprehend the provision of personnel services, but some of those services are excluded from this section of the NACE Rev.1. For example, casting industries are part of the cinema industry (NACE 92) though it is a selection and provision of a certain type of personnel. On

the contrary, the European jurisprudence includes model agencies. Finally, according to the revision of the CPC, escort services are to be found in the NACE 93.

In theory, the provision of hostesses (for the organisation of fairs and exhibitions) is a part of the NACE 74.50; exactly like model agencies. On the contrary, the provision of a working team, with its own management, the team being integrated in the organisation of the firm that employs it, but staying under the control of the firm that provides the team, is not to be classified in the NACE 74.50.

In theory, human resources management units of a group should not be classified in the NACE sector at stake. If the considered legal unit manages only the personnel of the group, it should be classified in the NACE 74.15. In practise, it is never classified in the right NACE, because the classification always considers the legal units, and never the financial units (the group or enterprise in the meaning of the statistical units regulation).

In the same way, unemployment charities, that help the unemployed being reinserted in the employment market by finding them a services job (such as gardening, house-cleaning, house-keeping, ironing...) should not be classified in the NACE 74.50, because they are non profit activities. They should conventionally be classified in the NACE 74.84 if the unemployed people are reinserted in a firm, or in the NACE 93.05 if they are employed by households. In practise, as it is very difficult to identify the charity businesses from the profit businesses, they are often classified in the NACE 74.50.

## **C. THE ACTIVITIES STUDIED IN THE SURVEY.**

As far as this sector of the NACE is concerned, it is clear that all those activities are very different. It is hard indeed to compare market and non market activities (private businesses and non profit organisations), permanent and temporary services (permanent placement and temporary work services), consulting and placement, action on the global employment market (placement) and action on a part of the market (human resources management). Therefore, it has been chosen to limit the survey to three types of activities : permanent placement services ; temporary work services ; recruitment and outplacement consulting. In fact, the first of those activities does not exist in France, in so far as it is a monopoly of the public authority. Those industries have in common several elements : there is a triangular relationship between an employer, an employee, and a third intervening party, the firm classified in the NACE Rev.1 74.50, which plays a part as an intermediary between the potential employer and the potential employee ; there are profit industries ; they have an effect on the global employment market ; they have known a recent development. We are now going to describe the three types of activity that we had decided to survey.

### *1. Temporary work services.*

We must not confuse temporary workers and fixed term workers. Fixed term workers are directly signed on by the firm, for a fixed and limited length of time. Fixed term contracts can be seasonal (for instance, on a seaside resort for summer) or due to short term cycles (brusque and non lasting raise of commands, for instance).

The temporary work firms sign temporary workers on and place them at other firms' disposal for a fixed length of time. Hence, there is a triangular relationship between a worker, the temporary work firm, and the firm that appeals to the temporary worker. In this triangular relationship, the temporary workers are paid by the temporary work firm, but take orders from the employing firm. In the temporary work firm, there are two different sorts of workers : the temporary workers, that have a special kind of contract that lasts as long as the mission in the user firm lasts ; and the permanent workers, whose contract is unlimited, and whose jobs consist in selecting the temporary workers, eventually training them, receiving the clients and finding the right temporary worker for the task at stake.

The temporary work firms generally operate at a local level, be they small firms or local units of international businesses. Moreover, the different laws hamper the free circulation of temporary workers amongst Europe, so there are few exports. If a firm wants to intervene abroad, it is generally easier and more efficient to create a subsidiary.

Some temporary work firms get specialised in the provision of a certain type of qualification, because it may be easier to manage a file of temporary workers that have the same particular qualification. Moreover, there are some reputation effects that may attract new clients and make them faithful. Some firms, or some subsidiaries are specialised, for instance, in the provision of medical personnel, or secretaries. Some firms want to use their capacity of selecting and training personnel in other provision of personnel services. Since it is forbidden to provide any type of service other than temporary work services, in France (but also in Belgium, Luxembourg, and Spain), those firms create subsidiaries that provide other types of services, that are generally linked to the provision of personnel (for instance, recruitment or outplacement consulting, training), or are operational services (cleaning services or safety services).

In Europe, France is the first market for temporary work services. It is the second in the whole world (in terms of full time equivalents). The United Kingdom and the Netherlands are also important markets. Germany and Austria have developed an important market, that could be bigger though, if the legislation did not heavily bear on the temporary work firms. In these two countries, indeed, the temporary work agencies are obliged to sign on the temporary workers for an unlimited length of time. Therefore, the German and Austrian temporary work agencies sign on comparatively less workers, and the cost of the appeal to temporary workers is higher. Still, the temporary work market is important in those countries. On the contrary, Luxembourg and Ireland are still small markets. Temporary work firms face a quick growth in Spain and in Portugal.

## *2. Carrier consulting (outplacement and inplacement).*

The outplacement services, and the services that are linked to them, were born because it appeared that the time when a manager began a young engineer in a firm, spent there 35 years and became head of the firm, was over. Nowadays, a senior executive is likely to experience one or two breaking ups in his or her carrier.

An outplacement office helps one or several people to find the job(s) that correspond(s) to their capacities, abilities, and tastes. The people at stake are generally speaking senior executive or managers. The outplacement service can be provided to one person only (it is then called « individual outplacement ») or to several people (it is then called « collective outplacement »). Outplacement offices often propose other services : carrier assessment, adaptation to a change of business culture, teambuilding. The service may consist in finding the right place inside the firm where the manager was already employed (in that case, it is sometimes called « inplacement »). This is then a way to optimise a recruitment. But it may also consist in finding a new job outside the firm, when one or several people are dismissed for economic reasons or because they do not give entire satisfaction to their employer. The consumer of the service is generally speaking a firm, but it can also be an employee. However, this case is seldom seen, since the service is quite expensive. The collective outplacement is generally used to avoid a dismissal. It might also be the case for an individual outplacement.

The outplacement services have been imported in France from the United States in the seventies. The second wave of creation of offices took place in the eighties, and the activity was marked by the development of collective outplacement. The last wave of creation took place in the early nineties. It was the most important of the three waves of implantation, but still, when the thrill around the activity was gone, some offices brutally closed down.

A study realised by the French professional association of outplacement offices from a sample of 730 assignments draw the impact of the activity on the global employment market. It seems that appealing to an outplacement office reduce the duration of the job search. The average age of the person to outplace is 43 years old. The average duration of an assignment is 5 months. The average payroll of the people that are outplaced is 340000FF before the outplacement.

### *3. Recruitment consulting.*

The recruitment consulting services may be seen as the exact opposite of the services described above. Indeed, those services are aimed at helping firms to recruit their permanent personnel, senior executives and managers in particular. In order to recruit the right person, the consultant must know very well the activity and the entrepreneurial culture of the client.

There are two ways of recruiting a person : by direct approach (which is often called « executive search » or « head hunting » because it is more frequently used for the recruitment of top managers), or by classified advertisements. In both cases, the consultant meets all the applicants, and

select the two or three that according to him fit best to the job. It is always up to the client to make the final decision<sup>1</sup>.

The direct approach needs more time and information, because the recruitment consulting office must contact the applicants-to-be, and it must have information about the people that work at the head of other firms. Computer are very important to manage and update the database that comprehends the information about senior executives throughout the country and abroad. As a consequence, the « executive search » is also more expensive than the recruitment consulting by classified advertisements : between 25 and 33% of the global annual payroll of the post, whereas it is generally around 15 to 20% of the global annual payroll (wages plus premiums) of the post in a case of advertisement recruitment.

Some offices get specialised in the recruitment of certain posts (administrative, engineers, computer engineers, law, finance or accounts managers, marketing, human resources management), towards certain countries (international jobs, German native speakers, Spanish native speakers), or certain sectors (aeronautics, food industry, weapons industry, insurance, audiovisuals, banking, chemicals, retail trade, computer services...). Some stay generalists.

## **II. THE METHODOLOGICAL CHOICES.**

---

### **A. THE DATA COLLECTION.**

#### *1. The questionnaire.*

##### a. General points.

The questionnaires were to be generalist. They were aimed at deepening the knowledge of the employment, the turnover, the internationalisation, the investment (and in particular the investment on the information technologies and on the immaterial assets) training and education. Indeed, three countries wanted to be part of the pilot action : the Netherlands and France, where there already exists a Business Annual Survey, and Denmark, where business statistics are based on registers. The questionnaires were designed as if they were destined to a country that has never surveyed the sector, and that want to investigate thoroughly the provision of personnel industry.

---

<sup>1</sup> It is always the case in France, since the placement (when the office choose the applicant) is prohibited. In other countries, the final decision may be taken by the recruitment office.



In fact, all the modules proposed in the questionnaire are treated in the French Annual Survey on Business services. But they are not treated so completely. For instance, there is only one questionnaire designed for the whole NACE Rev. 1 74.50 sector, and it only suggests three items for the breakdown of the turnover begotten by the firm : placement services (divided between senior executives recruitment, other placement services, and provision or renting of personnel other than temporary), temporary work services and other activities.

Since the activities we wanted to study are quite separate from one another, it has been decided to design two questionnaires in France. The first was designed for temporary work services, the second for recruitment and outplacement consulting services. We are then going to detail the variables asked for the two questionnaires and explain why they were important.

#### b. Recruitment and outplacement consulting services.

The questionnaire is divided in seven chapters : general characteristics of the firm ; breakdown of turnover ; exports ; employment and activity ; investments ; invoicing ; means used. The first block of questions try to analyse the environment in which the firm works. A series of questions asks about the financial links and the informal networks in which the firm may be. If an office is part of a group or of a network (which may give it access to databases, exchange clients or establish any type of co-operation), it is possible to infer that this fact has an impact on the accounting variables as well. We also ask about the membership of professional organisations, and about qualification and certification. In those fields of activity where anyone can open an office, the research for quality and certification is strong.

The second block asks different breakdowns of turnover. The breakdown by products does not follow the CPA, but has been suggested by the professional associations. It is also important to know who in the firm contacts the office to recruit someone. It is the aim of the following question, which asks about the position of the person who orders the recruitment or the outplacement. The questionnaire also asks about the breakdown of turnover according to the sector of the clients. There also is a question about the concentration of the clients.

Since it is necessary to have a close contact with one's client, there are few exports in that field. However, it seemed important to check this intuition, and to know towards which groups of countries there are exports, if any.

As far as the employment block is concerned, we did not completely follow the proposition of common core for the Eurostat pilot surveys. In such types of services as outplacement, inplacement, and recruitment services, the legal units are generally rather small, and the qualifications are not very dispersed. We were not likely to find, for instance, any industrial worker in that line of business. We finally asked for a breakdown of the employees by gender, and between directors, consultants other than directors, and administrative clerks. Those three functions had been suggested by the professional associations we had consulted while designing the questionnaire. We followed the common core of the Eurostat pilot actions in introducing questions asking for the breakdown of people employed by seniority in the firm and full time/part time.

We also asked some questions about the activity of the firm. For instance, we asked for the breakdown of the missions by bracket of annual payroll of the recruited or outplaced person. The invoicing is also an interesting question. The means used include the access to an external applicants' database (that may be managed by a network of independent offices) and the management of a computerised internal database.

### c. Temporary work services.

The questionnaire that deals with temporary work services is divided between six blocks : the first one details the general characteristics of the firm ; the second asks questions about the clients ; the third one deals with the exports of the firms ; the fourth one focuses on the employment of the firm, considering the permanent staff as well as the temporary workers ; the fifth one lays the stress on the investments ; and finally, the last one asks about the training inside the firm.

The block that focuses on the general characteristics of the firm is slightly different from the one we wrote for recruitment and outplacement services. We asked in what industries work the subsidiaries, in order to check some hypothesis that were suggested by the professional associations of the activity. We also asked for the number of local units, since the geographical proximity is important in that kind of activity.

The second block of the questionnaire deals with the clients of the firm. The first questions asks for a breakdown of the turnover between the sectors of industry of the clients. In this case we roughly followed the groups of the NACE Rev.1. The second question asks about the concentration of the clients and was suggested in the common core of the Eurostat questionnaire.

The block about the exports of the firm raised a certain number of questions. The definition that was finally chosen is the definition used in the general frame of business accounts and it was well understood and used by the firms. The professional associations were not satisfied by the simple breakdown of the destination countries between European Union, rest of Europe and rest of the world. As they thought that exports are basically cross borders provisions of temporary workers, they added a question about the three main destinations of the exports.

The block dealing with employment was clearly the most interesting one. First, the survey introduced a distinction between the permanent staff and the temporary workers of the firm. Secondly, it largely focused on the temporary workers. For instance, it had been noticed that firms often made a confusion between temporary workers (which have a special status materialised by a certain type of job contract) and part time workers (characterised by the duration of their work). Hence, the major part of temporary work firms declared their temporary workers as part time workers in the Annual Survey questionnaires, whereas they generally work full time in the firm they are leased to. In 1995, the part time employees were thus supposed to represent 60% of the total number of employees, which is wrong.

Focusing successively on the permanent staff and the temporary workers, we finally did not introduce the common core of the Eurostat pilot surveys. Indeed, the permanent staff are

comparatively not enough numerous to make such information as the seniority in the firm or the qualification accurate, regarding the raise of the respondent burden it leads to. As far as temporary workers are concerned, since they have fixed term contracts with the temporary work services firm, it is not judicious to ask about their seniority. Therefore, we asked for a breakdown by gender, duration of work and status (executives versus clerks) of the permanent employees, the total number of hours worked during the years by them, and the number of non employees (chairpeople, independents) of the firm. Regarding the temporary workers, we asked for the breakdown of the worked hours by gender and qualification. In order to underline the cycles of activity, we also asked a quarterly breakdown of the worked hours. And finally, we asked for a breakdown of the temporary work contracts by duration. The professional associations had indeed indicated that that duration was shorter and shorter as years went by. It is confirmed by statistical breakdowns on administrative records of the missions. The survey gave us the opportunity to check this trend.

The two last blocks are shorter than the previous one. One asks for the investments of the firm and the part of that investment dedicated to computers. As temporary work services firms are supposed to react as quickly as possible to find the right temporary worker, we may infer that computers are quite important in that industry. The block about the training of the people employed is important as well, all the more so as it distinguishes between the temporary workers and the permanent staff.

## *2. Mailing, telephone and fax.*

Most of the business surveys in France are mail surveys. It is the case of the Annual Surveys on Businesses, of the branches surveys, and of the one-off surveys, such as the Eurostat pilot surveys. In this case, since we wanted to speed up the data collection process, we proposed to the sampled firms to answer by fax, telephone or mail. The data collection timetable was quite simple : one or two weeks after having sent the questionnaires, two people in charge of the data collection were to call the firms back, ask them if they were willing to participate to the survey at stake, and how they wanted to answer. If they wanted to answer by phone, an appointment was to be taken rapidly for the data collection.

## **B. THE SAMPLE BASE AND SAMPLING METHOD.**

### *1. The statistics on enterprises' French system.*

#### a. The business register SIRENE.

All firms are available in the business register called SIRENE. SIRENE (Système Informatique pour le Répertoire des Entreprises et de leurs Etablissements, which means Computer System for the Register of Legal Units and their Local Units), was created in 1970. It is the basis of all statistical enquiries on the businesses' demography. It is also an inter administrative tool of information system and identification of the firms.

When a firm or an association is born, it has to be declared, either to a Chamber of Commerce if it is a firm, or to the local administration if it is an association. This declaration leads to the attribution of an inter-administrative identification number, which is called SIREN. One SIREN corresponds to one legal unit. When the legal unit ceases to exist, the SIREN number is never attributed again. To each of the legal unit's local units corresponds a unique local unit number, called SIRET. When the SIREN is attributed, the INSEE determines the main activity of the new legal unit. This information is entered, just like many others (location of the head office and of the local units, number of employees...). The SIRENE register includes several types of enterprises : the people that exert their activity as independents, professional people (physicians, shopkeepers, barristers) ; all kinds of companies (sole proprietorship, partnership, limited companies, nationalised industries, publicly-owned enterprises, state authority monopolies).

The SIRENE register is administered by the INSEE. It is rapidly updated, at least as far as creations of firms are concerned. For instance, a newly-born firm is in the register only a few days after its birth date. On the other hand, the declaration of the decease of a firm, though compulsory as well, takes more time, and therefore the register may comprehend some firms that have ceased to exist. The changes that may affect the life of a firm, such as a change of principal activity, or a change in the address, may not be recorded if the administration does not spot it, by whatever means (annual survey, administrative declaration, tax declaration).

#### b. The sample base OCEAN.

From SIRENE is extracted a sample base called OCEAN. It is used as a sample base for the six annual business surveys (on manufacturing industry, food industry, wholesale and retail trade, construction, transportation, and services). OCEAN is generally more rapidly updated, as far as the address and activity are concerned, than SIRENE. It allows the positive or negative co-ordination of samples between different surveys. For instance, it is possible to avoid that a firm selected for one survey be selected for another survey (negative co-ordination). On the contrary, it is possible to obtain that two samples, drawn for two different surveys, have common units (for instance, in order to elaborate a database). That is what is meant by « positive co-ordination ».

#### c. The French Annual Business Survey on services.

The French Annual Survey on Services (meaning business services, households services, and real estate activities) has been created in 1983. It was the last Business Survey created : the Annual

Survey on manufacturing businesses had been elaborated in 1966, the Survey on wholesale and retail trade in 1972, and the Survey on transportation in 1974. At first it did not cover the whole sector of services, but only the following subsections : HORECA, advertising, production of films, and so on, and so forth. Year by year it has been extended to all the business services and households services.

Today, the Annual Survey on Services Industries is mandatory and each year 65000 questionnaires or so are sent. Till 1997, there was a census on the firms that employed 20 employees and more. From now on, the threshold has been raised to 30 employees or 30 millions francs turnover, in order to curb the respondent burden. The new generation of the Annual Survey will survey alternately households services plus real estate activities and business services, according to a methodology that is already enforced in Canada, Japan or Australia. Business services will be surveyed each even year, from 1998 on. There is not any geographical stratification in the Annual Survey sample. The sample is stratified according to the main activity and the economic weight measured by the number of employees. The smallest firms, that is to say the firms that employ less than 30 employees and that have a turnover inferior to 30 millions francs, receive a light version of the questionnaire.

As far as work force services are concerned, all temporary work services firms are surveyed by the Annual Survey on Business Services. About 45% of the recruitment and outplacement consulting firms are surveyed. Here are the weight of the sample firms dealing with consulting :

| Strata | 0 salary | 1-5 sal. | 6-9 sal. | 10-19 sal. | 20 sal.<br>and more |
|--------|----------|----------|----------|------------|---------------------|
| Weight | 5        | 3        | 1        | 1          | 1                   |

90% of the total turnover of the NACE group in France is made by temporary work services firms. That is why we decided to divide our 200 firms sample between 180 temporary work services firms, and 20 recruitment or outplacement services offices.

## *2. The sample*

The NACE Rev.1 group 74.50 is divided in France between two subsections, one gathering the temporary work services firms, and the other the rest of the NACE group. We wanted to use some information available on the Annual Survey files. Some of those information are only asked to the firms that employ more than 30 employees or that have an annual turnover superior to 30 millions francs. The threshold seemed too high for recruitment or outplacement services so we did not introduce it. On the contrary, it seemed reasonable for temporary work services so we finally kept as a sample base the firms that had well answered to the 1995 Annual Survey and that employed more than 30 employees at the end of the year 1995.

Recruitment and outplacement offices are mingled with model agencies, management of human resources subsidiaries of groups and non profit organisations that help the unemployed. We had to eliminate them. It was all the more difficult as there is not any satisfactory selection criteria. The businesses that employ the biggest number of employees and that beget the biggest turnover are generally to be found amongst the human resources management subsidiaries, so these are quite easy to eliminate from the sample base. But there is no such easy way to segregate the recruitment and outplacement consulting services from model agencies, and unemployment charities. The solution was to write a sampling program, then to eliminate one by one the firms that did not correspond to the activities we wished to study, by comparing the list we had obtained to the professional associations lists, and to rerun the program on the sample base thus modified till we had obtained 20 firms identified as recruitment and outplacement consulting firms. We checked we had both activities.

As far as temporary work firms are concerned, there was no such difficulty. All firms are surveyed by the Annual Survey, and the sector is pure. We made two strata, one with firms employing between 30 and 99 salaries, one with firms employing 100 salaries and more. The ten biggest firms in terms of employees were systematically selected. In each stratum, there were roughly 240 firms, and we sampled a third of each stratum, using a simple sampling method.

*A few figures about the NACE Rev.1 74.50 group.*

|                                     | Temporary work services | Rest of NACE 74.50 |
|-------------------------------------|-------------------------|--------------------|
| Number of firms                     | 740                     | 1 430              |
| Turnover (MF)                       | 58 710                  | 7 720              |
| Employees 12/31/1995                | 281 450                 | 27 750             |
| Exports (MF)                        | 1 110                   | 200                |
| Investments (MF)                    | 230                     | 110                |
| Value Added/ Turnover               | 95%                     | 74%                |
| Average Hour payroll (FF)           | 57                      | 91                 |
| value added by occupied person (FF) | 172 500                 | 209 900            |

*Business Annual Survey.*

### III. THE RESULTS.

---

At that time it is very difficult to give any robust result about the recruitment and outplacement services. Indeed, the sample of those firms was small, and the response rate was even lower than for temporary work services, since only 5 out of twenty firms have answered. Moreover, it is difficult to use the Annual Survey files, since we cannot separate the recruitment and outplacement offices from the other selection and provision of personnel services of the NACE Rev. 1 74.50 group. This part of the address is thus dedicated to temporary work services firms.

## A. ASSESSMENT OF THE DATA COLLECTION.

### *1. A low response rate.*

The response rate at mid August was slightly inferior to 30%, which may seem good for a voluntary survey, but disappointed us, since we had established a cooperation with the professional associations of the sectors, and hoped a response rate of 50%. The response rate is quite similar in all the strata of the sample. Several factors can explain why the response rate was so disappointing.

First, there has been a time schedule problem. Instead of being launched during the second term of 1996, the data collection began in the early first term of 1997, only a few weeks before the Annual Business Survey questionnaires were sent. Some firms who were willing to answer the voluntary survey were then obliged to dedicate to the mandatory Annual Survey questionnaire. This explains the slowness of the data collection. Now, five months after the sending of the questionnaires, the INSEE goes on receiving some pilot survey questionnaires. The data collection is thus still going on, and the firms that have not answered are called back, but it is difficult to estimate the final response rate we are going to obtain. Secondly, it is possible that some firms were reluctant to look for old data. In the biggest firms, 1995's data are already classified in the archives of the firm, and it takes time to look for the data that were asked. Finally, the data collection system, with a phone call by two people in charge of the data collection and the data entry, may have worried some firms. The French firms are not used to giving information by phone, especially strategic data such as the ones the questionnaires dealt with. The high difficulty of some questions may also have deterred several firms from answering. We will see later on an analysis of the response behaviour.

### *2. Partial answers.*

The firms that have sent back the questionnaire have not always answered all the questions. After some discussions with firms and with professional associations, we can divide the questions that have a low response rate between two categories : the questions that are intrinsically difficult, and the questions that are too strategic or too sensitive to be answered.

| Question                              | Response rate |
|---------------------------------------|---------------|
| Number of local units                 | 100%          |
| Is your firm certified ?              | 100%          |
| If not, is certification in project ? | 90.2%         |
| Does your firm belong to a group ?    | 98%           |
| Breakdown of turnover                 | 92.2%         |

|                                                                        |       |
|------------------------------------------------------------------------|-------|
| Concentration of clients                                               | 98%   |
| Exports in 1995                                                        | 100%  |
| total payroll                                                          | 90.2% |
| Breakdown of the payroll between temporary and permanent workers       | 88.2% |
| Total social contributions                                             | 88.2% |
| Breakdown of the contributions between temporary and permanent workers | 74.5% |
| Breakdown of permanent employees                                       | 96.1% |
| Number of permanent employees                                          | 100%  |
| Number of hours worked in 1995 by the permanent employees              | 84.3% |
| Number of non employees occupied people                                | 86.3% |
| Breakdown of the hours worked by the temporary workers                 | 62.7% |
| Number of hours worked by the temporary workers                        | 92.2% |
| Number of hours worked by the temporary workers each quarter           | 68.6% |
| Breakdown of the contracts by length                                   | 68.6% |
| Investment                                                             | 72.5% |
| Training                                                               | 56.9% |

Among the first category, we find all the questions about the temporary workers on the one hand, and the permanent workers on the other hand. The firms are indeed used to communicating global data about their employees, but it was the first time that a survey asked a breakdown of the data between the two sub-populations of workers. Surprisingly, the firms are not always able to breakdown data such as wages, social contributions or training hours between the temporary workers and the permanent workers. Those data are important, though. But it seems that they are managed at a local unit level, and seldom at the level of the head office, which do not centralise this type of information. This also explains why the firms that only have one local unit have a superior response rate, and have better filled up the questionnaire than the other. Among the difficult questions, we also find the breakdown of the hours worked by the temporary workers by gender and qualification. Indeed, the firms are more used to giving the number of days worked by the temporary workers. Moreover, the qualification is badly known by the firms. That is why most of the respondents have given the total number of hours worked by the temporary workers, without breakdownning it.

The structure of the questionnaire itself was a factor of difficulty, since it asked different kinds of data : general data, known by the executives in general ; employment data, held by the human resources management department, if any ; accounting data, known by the relevant department inside the firm, or even by an external accounting office, if the management of the accounts was subcontracted. Therefore, the questionnaire had to circulate between the different services of the firm, which means that someone had to take the responsibility of checking that it was filled up by each service. This explains why the questionnaires were not always completely filled.

Among the second category, we find the breakdown of turnover by sector of the client. A few firms have not given this information. However, the response rate to this question is higher than the response rate for the questions mentioned above. We can safely infer that the firms that have answered did not consider there was a confidentiality issue with the INSEE, and that when they did



not answer a question, it was because they could not find the information rather than desired to overshadow it.

## **B. THE RESPONDENT BEHAVIOUR.**

### *1. Cross tabulations.*

As there was an access to administrative data and to data collected earlier by the Annual Business Survey on Services, we could draw some comparison between the respondent and the firms that had not answered to the questionnaire. The general non response rate was 72,2% when we began to study the response behaviour. It was interesting to see what links could appear between the variables of the Annual Survey and the response behaviour.

First, we crossed some variables two by two, in order to calculate simple statistics. To achieve this goal, we merged the table of the data we had collected and entered and the table of the data issued from the Annual Business Survey. Then we created a dichotomised variable to code the response and the non response. We crossed this variable with the number of employed people, the number of employees, the value added, the turnover, the legal status and the geographic dispersion of the local unit.

We then discovered that the response rate is curbed when the number of people employed augments. The non response rate is 70% among the firms that employ less than a hundred people, 73% among the firms that employ between 100 and 500 people, and 77% among the firms that employ more than 500 people. The non response rate is quite similar with the number of employees. The difference is even more important between the firms that have only one local unit and the firms that are dispersed throughout the country. The non response rate is 65% among the firm that only have one local unit. It raises to 73% among the firms that have several local units situated in the same NUTS2. It goes up to 78% among the firms that have several local units in different NUTS2, one NUTS2 concentrating more than 80% of the people employed by the legal unit. And finally, it is 85% among the firms the local units of which are situated in different NUTS2, none of them concentrating more than 80% of the people employed.

In fact, such a link would not be surprising. Indeed, a legal unit that only has one local unit has a total access to its data. It may be more difficult for a firm that owns several units to gather all the information asked by the questionnaire, even if the local units are all situated in the same local area. For instance, such information as the qualification of the temporary workers or the wages and social contributions may be managed locally by each local unit, and not gathered by the head of the firm. The more dispersed the local units are, the more difficult it is for a respondent to gather all the information.

It seems that there is a difference between the limited companies and the corporate business, as far as the response or non response is concerned. The non response rate is 67% for the limited companies, and 77% for the corporate business. We may infer from that figures that there may be a link between the response behaviour and a hidden variable strongly linked with the legal status, for example, the amount of capital. Indeed, less capital is needed in order to found a limited company than to found a corporate business. So the link may be between the size or amount of social capital and the response rate, instead of being between the legal status and the response rate.

On the contrary, at first it does not seem that the turnover or the value added are good explanatory variables for the response or the non response behaviour. Those conclusions needed to be checked with some other data analysis. That is why we tried to test a few models. We made a logistic regression on the variable to analyse which variables had an influence on the response behaviour. We also made a cluster analysis and a factor analysis.

## *2. Data analysis.*

We have tested the accuracy of a logistic regression. We introduced in the model several qualitative variables : three brackets of turnover ; three brackets of number of employees ; the legal status ; two brackets of location of the head of the firm ; the index of dispersed location already defined above ; the production ; the profits of the firm. In this model, it appears that only two variables are relevant to explain the respondent behaviour of the firms : the location of the head of the firm, and the dispersed location of the local units. Hence, a firm whose head is located elsewhere than in Paris is more likely to answer than a firm whose head is located in Paris. In the same way, a firm that owns only one local unit is more likely to answer than a firm that has several local units. In order to test if there was not a link between the location in Paris and the number of local units, we replaced these two variables by a new one crossing the location of the firm's head office and the index of unique local unit. The model is not relevant, which means that the two variables have an impact on the response behaviour.

We also tested two models one against the other. In the first one, we tested the explanatory capacity of the number of local units (one local unit versus several local units). In the second one, we tested the explanatory capacity of the dispersion of the local units (one local unit or several local units in only one NUTS2 versus several units in several NUTS2). It appears that the first one is more relevant than the second one, since the number of concordant predictions is higher in that case.

## **C. THE KNOWLEDGE OF THE SECTOR.**

### *1. General characteristics.*

a. Financial links and number of local units.

There is no question about the ownership of the firm or about its financial links in the administrative sources or in the Annual Business Survey questionnaire. There exists in France a survey on the financial links, but it does not necessarily include all the firms that have financial links with other firms. The question was introduced in the pilot survey questionnaire, and the results here are extracted from the 51 questionnaires we received. We have to keep in mind the fact that all the firms that had been sampled employed at least 30 employees at the end of the year 1995.

| Belongs to a group | Frequency | Percent | Cumulative percent |
|--------------------|-----------|---------|--------------------|
| Yes                | 5         | 10      | 10,0               |
| No                 | 45        | 90      | 100,0              |

Amongst the 50 temporary work services firms that have answered the question, only 10% were members of a group. There is a link between the turnover begotten by the firm and its belonging or not to a group. None of the firms that have begotten a turnover inferior to 20 millions francs belonged to a group. Less than 10% of the firms that had made a turnover comprised between 20 and 100 millions francs were part of a group. But 60% of the firms that had earned more than 100 millions francs were members of a group. Among those firms which belong to a group, four declared that the group's head office was in France ; only one is owned by a group the head office of which is abroad (more precisely, in the United States). Yet, we may infer that those results would be different if all the ten biggest firms had answered the survey, since we know that amidst those firms, several belong to international groups whose head offices are in Switzerland, in the Netherlands or in the United Kingdom.

The number of local units is part of the Annual Survey questionnaire. We could then base our statistics on the whole population of temporary work services firms, since they are all surveyed by the Annual Business Survey. The average number of local units by firm is around 6, but half of the firms have only one local unit, and 75% of them have three or less local units. In fact, 9 out of ten firms have six or less local units, but the average figure is influenced by the biggest firms, who have more than a hundred local units. The biggest firm in France has almost 700 local units, and the second one more than 600 local units. It is interesting to note that, if the average number of local units is far superior when calculated with the pilot survey results, on the contrary the median and the third quartile are exactly the same. It is an illustration of the well known fact that the quartiles are more robust statistics than the mean.

b. Certification.

The question about certification was introduced for the first time in the pilot survey, so there may be a bias because of the selection of bigger firms. Approximately 20% of the firms that have answered to the questionnaire are certified.

| Has certification | Frequency | Percent | Cumulative percent |
|-------------------|-----------|---------|--------------------|
| Yes               | 10        | 19,6    | 19,6               |

|    |    |      |       |
|----|----|------|-------|
| No | 41 | 80,4 | 100,0 |
|----|----|------|-------|

Among those which are not certified, 12% do not have answered to the question about the projects of certification, and 46% have answered the certification was not in projects. That can be easily explained by the cost or preparing for being certified. It takes time to achieve the requirements of the certification, and the smaller firms cannot afford to dedicate time to this time-consuming training.

| Projects certification        | Frequency | Percent | Cumulative percent |
|-------------------------------|-----------|---------|--------------------|
| No object (already certified) | 10        | 19,6    | 19,6               |
| No answer                     | 5         | 9,8     | 29,4               |
| Yes                           | 17        | 33,3    | 62,7               |
| No                            | 19        | 37,3    | 100,0              |

This is not surprising then to state that the biggest firms are certified, whereas the smallest are not. Among the firms that have answered to the pilot survey, all the firms that have more than 10 local units are certified. On the contrary, only 24% of the firms that have between 2 and 9 local units are certified, and the percentage falls to 4% if we consider the firms that have a unique local unit.

## 2. The turnover.

### a. The amount of annual turnover.

Since it is a data we can find in the Annual Business Survey results, we did not use the results of the pilot survey to analyse this variable. The average turnover is 80 millions francs, but half of the firms earn less than 15 millions francs, and 75% less than 30 millions francs. The five biggest firms concentrate more than half of the total turnover begotten by the temporary work services firms, which amounts to approximately 60 billions francs. The sector is thus very concentrated.

### b. The sectors of the clients.

Using the answers of the respondents, we analysed the sectors of the clients that appeal to temporary work services. We created several ordered qualitative variables, coding 0 if the firm did not provide any temporary work services to the sector at stake, 1 if the sector represented less than 50% of the firm's turnover, and 2 if the sector represented more than 50% of the turnover of the firm.

Some sectors always represent less than 50% of the turnover of the firms : it is the case, for instance, of the HORECA sector, which may appeal to other specific forms of employment, such as seasonal jobs ; of the administration and government organisations ; of the bank and insurance sector. Those sectors generally consumes rather few temporary work services, since at least 80% of

the firms declared they did not provided services to those sectors. The trade sector, the health sector, the transportation sectors, and the residual sector are not big clients of the temporary work services either. They represent the biggest client (more than 50% of the turnover) of a few specialised firms (between 1 and 4) but they are small clients for the majority of the firms. On the contrary, the sectors of industry and construction are great consumers of temporary work services : 55% of the firms declared that industry represented more than 50% of their turnover ; 20% of the firms declared that construction represented more than 50% of their turnover.

#### c. The concentration of the clients.

In most cases, for about 60% of the respondents, the three biggest clients represent between 10 and 50% of the turnover. 15% of the firms are quite dependent on their three biggest clients, who represent more than 50% of their turnover. On the contrary, a quarter of the firms do not depend on their biggest clients, who beget less than 10% of their turnover.

The concentration of the clients is linked with the turnover. None of the firms that have begotten a turnover superior to 100 millions francs depends for more than 10% of its turnover on its three main customers. On the contrary, 22% of the firms that have earned less than 20 millions francs have declared that their three main customers represented more than 50% of their turnover.

#### d. The exports.

The survey confirm that exports are rare (70% of the firms do not export at all their services) and that it is a local phenomenon. The firms that have declared exports are mainly located in the East of France, and the destination countries are France's direct neighbours, Germany (quoted 11 times by the respondents), Belgium (quoted once) and Luxembourg (quoted three times). Among the firms that have answered to the pilot survey, we found that more than 75% of the firms whose head office is in Alsace had exported ; the proportion is still of 60% among the firms located in Lorraine. The two firms located in Paris, and the firm located in Loire county, that have exported, are among the five biggest French firms, and their local units are spread throughout the country, and in particular in the East of France. The local aspect of temporary work services is thus confirmed.

Exports are also linked with the turnover, since 75% of the firms that have a turnover inferior to 20 millions francs have not exported in 1995, whereas they are 72% among the firms that have earned between 20 and 100 millions francs, and 40% among the firms that have earned more than 100 millions francs. We have tested a logistic model on the total population of temporary work services firms. In the Annual Business Survey, there is a question about the exports of the firm. We introduced as explanatory variables the total turnover and the location of the head office. As far as the location of the head office was concerned, we created two variables, one indicating that the head office was in Paris, the other that the head office is in the East of France. Everything else being equal, the bigger turnover the firm earns, the most likely it is to export. A firm whose head office is located in the East of France is also more likely to export. The concordance is of 81.7%, the discordance of 15.6%, and the tied pairs are 2.7%.

| Variables              | value  | standard error | Wald chi-square | pr>chi-square |
|------------------------|--------|----------------|-----------------|---------------|
| Intercept              | -2.65  | 0.2213         | 144             | 0.0001        |
| Turnover               | 4E-6   | 1.007E-6       | 16              | 0.0001        |
| Head in Paris          | 0.1434 | 0.2945         | 0.23            | 0.6224        |
| Head in East of France | 3.1262 | 0.2967         | 111             | 0.0001        |

| Index   | value   |
|---------|---------|
| Somer's | 0.661   |
| Gamma   | 0.0.679 |
| Tau-a   | 0.190   |
| c       | 0.831   |

### 3. *The employment.*

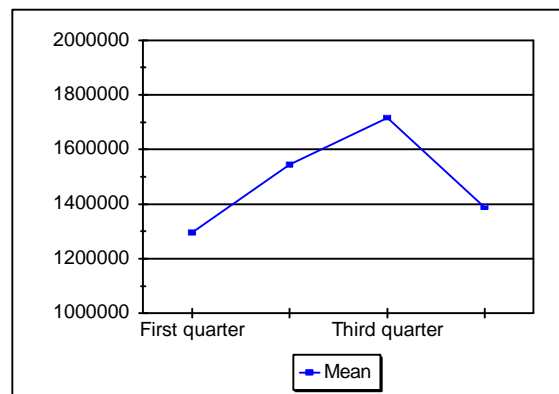
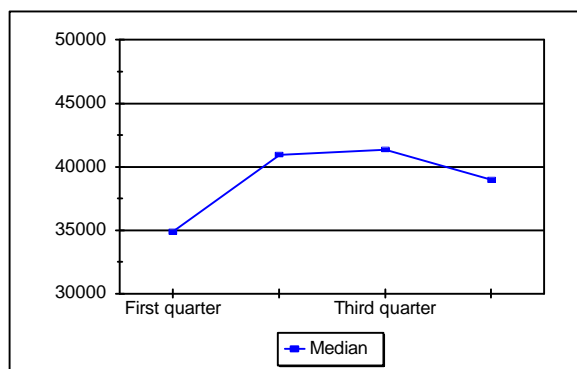
#### a. The number of workers.

The majority of the 51 respondent firms declared they employed less than 5 permanent employees : it is the case of 40% of the respondents. 30% of the firms employ between 5 and 10 permanent employees, and 30% more than 10.

Thanks to the variable of the total number of hours worked by the temporary workers, we can calculate a full time equivalent number of temporary workers for the year 1995. We consider that the legal weekly duration (39 hours) is respected, and that the duration of holidays (5 weeks) is applied equally for everyone. 30% of the firms employ less than 50 full time equivalent temporary employees. 45% of the firms employ between 50 and 200 full time equivalent temporary workers. 25% of the firms employ more than 200 full time equivalent temporary workers. It is thus possible to estimate a ratio between the number of full time equivalent temporary workers and the number of permanents at the end of 1995. It would perhaps have been more relevant to use the average number of permanents, but the question was not asked and the information is not in the Annual Survey file either. Moreover, we can infer that the number of permanents do not change much during the year. The average number of temporary workers per permanent worker is 15,8. In a quarter of the responding firms, this ratio is inferior to 7. In 50% of the firms that have answered the survey, there are less than 16 full time equivalent temporary workers for one permanent worker. The highest rate is of 46.

If we consider the total number of employees at the end of the year 1995, among the whole population of temporary work services firms, we see that 25% of the firms employed less than 15 employees (permanent and temporary mixed). The 25% biggest firms employed more than 130 employees. Those figures clearly show that the activity is less important during the last quarter of the year. If we consider the average number of employees, we can see that the quartiles are higher : 50% of the firms employs more than 68 employees, and the 25% biggest firms employed more than 155

employees. This is confirmed by the analysis of the pilot survey results. Among the respondents, 35 firms have answered the question about the quarterly breakdown of the hours worked by the temporary workers.



The mean as well as quartiles show that the best quarter for temporary work services activity is the third one. By calculating the ratio of the hours worked each quarter by the number of hours worked during the third quarter, we can see that the average index for the first quarter is 0.735 (with a median of 0.743), 0.895 for the second quarter (median 0.883) and 0.802 for the third quarter (median 0.838).

#### b. The training.

The training of the employees, and of the temporary workers in particular, is important. In France, an agreement was passed in 1991 between the professional associations and the trade unions, which stipulates that the training policy inside the firm must increase the general level of education of the employees, but also enrich the professional capacities of the temporary workers by developing their skills. Each firm is bound to pay a tax, which is calculated as a certain percent of the aggregate remuneration of the employees, and can also propose some training sessions of its own.

Using the answers to the pilot survey, it appears that among the 29 firms that have answered the question, 27 dedicated money to the training of their permanent employees, and 28 to the training of their temporary workers. The amounts dedicated to the training of the temporary employees are quite superior to those dedicated to the training of the permanent employees. This result is not surprising : the temporary workers must receive training sessions in order to be adequate to the firms' demand of qualification.

| Statistics on training | Permanent workers | Temporary workers |
|------------------------|-------------------|-------------------|
| Mean                   | 4.8 MF            | 13.4 MF           |
| Sum                    | 140 MF            | 390 MF            |
| Standard error         | 18 042 633        | 42 342 683        |

|                |            |            |
|----------------|------------|------------|
| First quartile | 8 000 FF   | 60 000 FF  |
| Median         | 59 000 FF  | 140 000 FF |
| Third quartile | 150 000 FF | 400 000 FF |

The variables are very dispersed, because some firms do not dedicate any amount to the training of their employees, whereas a few ones affect to the training important sums (90 MF is the higher sum dedicated to the permanent workers' training by the firm that employs them, and as far as the temporary workers are concerned, the maximum is of 190 MF). 25% of the firms have spent in 1995 more than 150000 francs in order to train their permanent employees, but the same proportion have spent more than 400 000 francs in order to train their temporary workers.

#### c. The length of the contracts.

Among the respondents, 37 firms have given the breakdown of the temporary work services contracts by the length. For 60% of the respondents, there are no contracts the length of which is superior to six months. The contracts are generally speaking rather short, since 75% of the firms declared that the contracts that last less than a month represent more than half the contract they conclude. The contracts of five days or less represent more than half the total contracts for 20% of the respondent firms.

## **CONCLUSION**

---

Even if the response rate to the pilot survey was quite low, it has been possible to invalidate or to validate some hypothesis that the professional associations had formulated about temporary work services. Unfortunately, it has not been possible to use the results, as far as recruitment and outplacement services were concerned. Still, we will go on calling the firms that have not answered the survey yet, in order to increase the response rate and obtain more robust statistics. It may then be possible to analyse the results of the recruitment and outplacement services as well.

The Annual Business Survey file is a very useful source that allowed us to analyse quite precisely the characteristics of temporary work services. Unfortunately, till 1996, there was no difference made between the temporary workers and the permanent workers in the Annual Business Survey questionnaire. The pilot survey only allowed some simple statistics, on the subject, since the response rate was too low to make some econometric study. The new questionnaires of the Annual Business Survey will separate the two kinds of workers. It will thus be possible to analyse more precisely the differences between the two categories of workers that exist inside the temporary work services firms.



There also is an interesting source about employment, which is an administrative and exhaustive source about employees. We did not have enough time to explore this source, but it can be a third way of finding data about selection and provision of personnel services' employment.

## ANNEX 1

### THE LEGISLATION IN FORCE IN A FEW OECD COUNTRIES

#### TEMPORARY WORK SERVICES

| Country            | Year of legislation | Exclusiveness of the activity                                                                                    | Preliminary legal authorisation | Sector bans                             | Forbidden cases                                                    |
|--------------------|---------------------|------------------------------------------------------------------------------------------------------------------|---------------------------------|-----------------------------------------|--------------------------------------------------------------------|
| Austria            | 1988                | NO                                                                                                               | YES                             | None                                    | None                                                               |
| Belgium            | 1987                | YES                                                                                                              | YES                             | Construction<br>Transports              | Strike<br>Lock-out                                                 |
| Denmark            | 1990                | NO                                                                                                               | NO                              | None                                    | None                                                               |
| Finland            | 1985                | NO                                                                                                               | NO                              | None                                    | None                                                               |
| France             | 1990                | YES                                                                                                              | YES                             | None                                    | Strike                                                             |
| Germany            | 1985                | NO                                                                                                               | YES                             | Construction                            | None                                                               |
| Ireland            | -                   | NO                                                                                                               | YES                             | None                                    | None                                                               |
| Japan              | 1985                | YES                                                                                                              | YES                             | Construction<br>Harbours                | YES                                                                |
| Luxembourg         | 1994                | YES                                                                                                              | YES                             | None                                    | None                                                               |
| Norway             | -                   | NO                                                                                                               | NO                              | None                                    | None                                                               |
| Portugal           | 1989                | NO                                                                                                               | YES                             | None                                    | Strike                                                             |
| Spain              | 1994                | YES                                                                                                              | YES                             | None                                    | Strike<br>Dangerous tasks<br>dismissal during the<br>previous year |
| Sweden             | 1982                | <i>temporary work services are officially banned, but can be tolerated since the 1982 law on precarious jobs</i> |                                 |                                         |                                                                    |
| Switzerland        | 1991                | NO                                                                                                               | YES                             | None                                    | None                                                               |
| the Netherlands    | 1990                | NO                                                                                                               | YES                             | Construction<br>Transports<br>Education | Strike                                                             |
| the United Kingdom | 1973                | NO                                                                                                               | YES                             | None                                    | Strike                                                             |
| the United         | -                   | NO                                                                                                               | NO                              | None                                    | None                                                               |

|        |  |  |  |  |  |
|--------|--|--|--|--|--|
| States |  |  |  |  |  |
|--------|--|--|--|--|--|

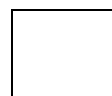
The legislation is very different from one country to another. In Denmark, Ireland and the United Kingdom, there is not regulation, no limitation, and therefore no protection of the temporary worker. For instance, it is possible to appeal to temporary workers in case of a strike. Other countries have introduced a series of limitations : limitation of the sectors where temporary work services can be provided for, and limitation of the cases when it is possible to ask for temporary workers. In Europe for instance, it is forbidden to appeal to temporary workers in Rotterdam or Dordrecht's harbours, because harbours' jobs are dangerous and temporary workers, who are less trained than permanent workers, are more exposed to industrial injuries. It is the only case in Europe of geographical limitation.

The industry limitations are more widespread throughout the European Union. In Belgium and in the Netherlands, the recourse to temporary work services is forbidden in the construction and transportation industries. In Germany, temporary workers are not allowed in the construction. In Finland, the temporary work services are banned in the metallurgy sector of activity. In Norway, it is only authorised in the retail trade activities and for office administrative jobs in the other sectors of industry. In Japan, it is possible to appeal to temporary workers in computer services, accounting services, cleaning services, safety services, or secretariat. Those limitations are aimed at protecting the temporary worker from industrial injuries : the sectors in which the temporary work is banned are those where such injuries are more frequent.

In France, temporary work services are authorised in all types of industries, but the recourse to those services is limited. This type of restriction is also widespread in Europe among the countries that have adopted the Latin model. In those countries, the temporary work services are considered as an help to a firm that temporarily needs additional work force, on provisory posts. Precisely, it is possible to sign on a temporary worker in order to replace an absentee (illness, motherhood...), to face a raise of work, or to carry out an unusual task. We can find the same type of restrictions in Luxembourg, or in Austria. Generally speaking, it is not possible to sign on temporary workers if there is a strike in the firm. It is even forbidden in Ireland and in the United Kingdom. In almost all the countries, the strike is considered as a fundamental right of the workers. We find two exceptions to that principle : the United States, and Denmark.

ANNEX 2

THE QUESTIONNAIRES USED IN FRANCE





**Enquête pilote européenne n° 2**  
**« Travail temporaire »**  
**(Classe 74.50 - NACE Rév.1 - NAF 74.5B)**

**Identification de l'entreprise**  
SIREN :

Personne à contacter dans l'entreprise :

M. ....

Téléphone : .....

Fax : .....

**1 - Caractéristiques générales de l'entreprise**

**.Activité principale :** .....

**2. Nombre d'agences au 31/12/95** |.....|

**3. Certification (au moment de la réponse)**

Avez-vous la certification ISO 9002 ?    oui    ☐ non    ☐

Si oui, quel est l'organisme de certification ? .....

Si non, est-elle en projet ?                      oui    ☐ non    ☐

**. Liens financiers en 1995**

**a. Est ce que l'entreprise appartient à un groupe ?**                      oui    ☐ non

☐

si non, veuillez passer directement au bloc 2.

Localisation du siège du groupe :                      France ☐    étranger ☐

Si il est situé à l'étranger, merci d'indiquer le pays : .....

**b. Est ce que l'entreprise est siège de groupe ? ....** oui    ☐ non    ☐



Si oui, nombre d'entreprises filiales en France

Nombre d'entreprises filiales **dans** l'Union européenne

Nombre d'entreprises filiales **en dehors** de l'Union européenne

c. Quelles activités exercent les autres entreprises du groupe ?

services opérationnels (nettoyage, sécurité, gardiennage...).....☐

conseil en recrutement .....☐

activités de formation .....☐

autres.....☐

## 2 - Ventilation du chiffre d'affaires (exercice 1995)

**. Ventilation par secteur d'activité de l'entreprise cliente (% du chiffre d'affaires)**

Industries (*hors énergie*) .....

Bâtiment et travaux publics .....

Commerce .....

Transports.....

Hôtels et restaurants.....

Santé (*y compris paramédical*).....

Banques et assurances .....

Administrations publiques .....

Autres (*y compris communications, services aux entreprises, énergie*)

**CHIFFRE D'AFFAIRES TOTAL HORS TAXES: .....**

- 2** . Ensemble, vos trois principales entreprises clientes représentent :
- moins de 10% du chiffre d'affaires .....☐
- entre 10 et 49% du chiffre d'affaires.....☐
- plus de 50% du chiffre d'affaires .....☐

## 3 - Exportations de l'entreprise (exercice 1995)

*On appelle exportation la fourniture de personnel facturée à l'étranger.*

. A-t-elle exporté durant le dernier exercice comptable ? oui ☐ non

☐

Si oui :





montant « exporté » vers l'Union Européenne.....|\_\_\_\_\_|  
montant « exporté » vers les autres pays européens|\_\_\_\_\_|  
montant « exporté » vers les autres pays.....|\_\_\_\_\_|

**②**. Si votre entreprise exporte dans l'Union Européenne, merci de préciser les principaux pays destinataires :

.....  
.....  
.....

## 4 - Emploi (exercice 1995)

### . Frais de personnel

. Salaires et avantages en nature, dont :

personnel permanent .....|\_\_\_\_\_|  
intérimaires .....|\_\_\_\_\_|

. Charges sociales, dont :

personnel permanent .....|\_\_\_\_\_|  
intérimaires .....|\_\_\_\_\_|

### **②**. Personnel permanent de l'entreprise

#### Effectifs salariés au 31 décembre 1995

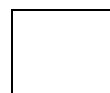
| Nombre de personnes | Cadres      |               | Employés    |               | Total |
|---------------------|-------------|---------------|-------------|---------------|-------|
|                     | Temps plein | Temps partiel | Temps plein | Temps partiel |       |
| <b>Hommes</b>       |             |               |             |               |       |
| <b>Femmes</b>       |             |               |             |               |       |
| <b>Total</b>        |             |               |             |               |       |

Nombre total d'heures travaillées par les permanents .....|\_\_\_\_\_|

.....Personnel permanent non salarié (dirigeants, gérants, indépendants)  
nombre au 31 décembre 1995.....|\_\_\_\_\_|

### **③**. Personnel intérimaire

|  | Nombres d'heures travaillées pendant l'année |        |       |
|--|----------------------------------------------|--------|-------|
|  | Hommes                                       | Femmes | TOTAL |
|  |                                              |        |       |



|                                             |  |  |  |
|---------------------------------------------|--|--|--|
| <b>Cadres, ingénieurs</b>                   |  |  |  |
| <b>Techniciens, agents de</b>               |  |  |  |
| <b>Ouvriers qualifiés</b>                   |  |  |  |
| <b>Personnel médical<br/>et paramédical</b> |  |  |  |
| <b>Secrétariat, comptabilité</b>            |  |  |  |
| <b>Autres employés</b>                      |  |  |  |
| <b>Ouvriers non qualifiés</b>               |  |  |  |
| <b>Autres</b>                               |  |  |  |
| <b>TOTAL</b>                                |  |  |  |

**Nombre d'heures travaillées pendant le trimestre**

|               | 1er trimestre | 2ème trimestre | 3ème trimestre | 4ème trimestre |
|---------------|---------------|----------------|----------------|----------------|
| <b>Nombre</b> |               |                |                |                |

**Caractéristiques des contrats (intérimaires seulement)**

*Répartition en fonction de la durée des contrats (% du nombre total de contrats)*

5 jours ou moins .....|\_\_\_\_\_|  
de 6 jours à 2 semaines .....|\_\_\_\_\_|  
de 2 semaines à 1 mois .....|\_\_\_\_\_|  
de 1 à 6 mois.....|\_\_\_\_\_|  
plus de 6 mois .....|\_\_\_\_\_|

## 5 - Investissements (exercice 1995)

Montant des investissements corporels : .....|\_\_\_\_\_|  
dont équipement informatique : .....|\_\_\_\_\_|

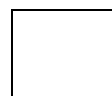
## 6 - Formation de l'exercice 1995 (\*)

*(\*) y compris la formation interne à l'entreprise ou effectuée par une filiale du groupe auquel l'entreprise appartient. La définition est celle utilisée dans le calcul de la taxe à la formation.*

Personnel permanent : nombre de jours x personnes .....|\_\_\_\_\_|  
montant en KF .....|\_\_\_\_\_|



Personnel intérimaire : nombre de jours x personnes .....|  
montant en KF .....|





**Enquête pilote européenne n° 2**  
**« Services de recrutement &**  
**d'outplacement »**  
**(Classe 74.50 - NACE Rév.1 - NAF 74.5A)**

**Identification de l'entreprise**

Personne à contacter dans l'entreprise :

M. ....

Téléphone : .....

Fax : .....

**1 - Caractéristiques générales de l'entreprise**

..... **Activité principale** :  
.....

**2 . Liens financiers et appartenance à un réseau**

**a.** Est-ce que l'entreprise appartient à un groupe ?    oui ☐ non ☐

Si oui, nom du siège du groupe .....

Localisation du siège du groupe :    France ☐ .....étranger ☐

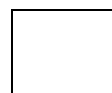
Si à l'étranger, nom du pays .....

**b.** Est-ce que l'entreprise est siège de groupe ?    oui ☐ non ☐

Si oui, nombre de filiales en France .....|.....|

Nombre de filiales **dans** l'Union européenne .....|.....|

Nombre de filiales **en dehors** de l'Union européenne .....|.....|





c. L'entreprise fait-elle partie d'un réseau ? .....oui ☐ non ☐  
*(un réseau est constitué d'entreprises liées par des relations durables, formelles ou non, qui établissent une communauté d'intérêt, aussi limitée soit-elle)*  
 Nom de la tête de réseau éventuelle .....  
 Localisation de la tête du réseau : France ☐ ..... étranger ☐  
 Si à l'étranger, nom du pays .....  
 nombre d'entreprises du réseau .....|.....|

**3**. L'entreprise est-elle membre d'une organisation professionnelle ? oui ☐ non ☐

**4**. Qualification et certification

Avez-vous la qualification OPQFC ? ou ☐ non ☐  
 Avez-vous la certification ISO 9002 ? ou ☐ non ☐  
 Si non, est-elle en projet ? ou ☐ non ☐

## 2 - Ventilation du chiffre d'affaires (exercice 1995)

### . Ventilation par « produit » (*par catégorie de service, en %*)

**- Services de conseil en recrutement :**

Par approche directe.....|.....|  
 Par annonces .....|.....|

**- Services d'outplacement :**

Outplacement individuel .....|.....|  
 Outplacement collectif.....|.....|

**- Autres services de conseil** (*formation aux méthodes de recrutement, d'évaluation, à la recherche d'emploi, audit social, bilans de carrière et de compétences, mise en situation professionnelle, merci de préciser*) :

.....|.....|  
 .....|.....|  
 .....|.....|  
 .....|.....|

**- Autres services** (*merci de préciser*) :.....|.....|

**CHIFFRE D'AFFAIRES TOTAL : .....** |.....|

### **2**. Ventilation du chiffre d'affaires selon la position du donneur d'ordre dans l'entreprise (en %)



Directeur général et P.D.G.....|\_\_\_\_\_|  
 Directeur des ressources humaines .....|\_\_\_\_\_|  
 Directeur opérationnel.....|\_\_\_\_\_|  
 Autres .....|\_\_\_\_\_|

### 3. Ventilation du chiffre d'affaires par secteur d'activité (en %)

Industries agricoles et alimentaires.....|\_\_\_\_\_|  
 Industries médicales et pharmaceutiques .....|\_\_\_\_\_|  
 Autres industries manufacturières .....|\_\_\_\_\_|  
 Bâtiment et travaux publics .....|\_\_\_\_\_|  
 Transports et télécommunications .....|\_\_\_\_\_|  
 Distribution .....|\_\_\_\_\_|  
 Autres services non financiers .....|\_\_\_\_\_|  
 Services financiers .....|\_\_\_\_\_|  
 Secteur public (y compris collectivités territoriales).....|\_\_\_\_\_|  
 Autres .....|\_\_\_\_\_|

### 4. Les trois principaux clients de votre entreprise représentent:

moins de 10% du chiffres d'affaires total .....☐  
 entre 10 et 49% du chiffres d'affaires total .....☐  
 plus de 50% du chiffres d'affaires total .....☐

## 3 - Exportations de l'exercice 1995

*Les exportations sont les montants facturés à des entreprises domiciliées à l'étranger.*

L'entreprise a-t-elle exporté durant le dernier exercice comptable ? oui ☐  
 non ☐ Si oui, montant exporté vers **les pays de l'UE**.....|\_\_\_\_\_|  
 montant exporté vers **les pays européens hors UE**.....|\_\_\_\_\_|  
 montant exporté vers **les autres pays**.....|\_\_\_\_\_|

## 4 - Emploi et activité de l'exercice 1995

### . Personnel de l'entreprise

|                                   | Effectif salarié au 31 décembre 1995 |        |       | Effectif salarié au 31 décembre 1994 |        |       |
|-----------------------------------|--------------------------------------|--------|-------|--------------------------------------|--------|-------|
|                                   | Hommes                               | Femmes | TOTAL | Hommes                               | Femmes | TOTAL |
| <b>Dirigeants</b>                 |                                      |        |       |                                      |        |       |
| <b>Consultants<br/>hors</b>       |                                      |        |       |                                      |        |       |
| <b>Personnel<br/>administrati</b> |                                      |        |       |                                      |        |       |
| <b>TOTAL</b>                      |                                      |        |       |                                      |        |       |



Personnel non salarié, nombre au 31 décembre 1995 .....|\_\_\_\_\_|

**② Ventilation du personnel (effectif au 31 décembre 1995) :**

*par ancienneté au sein de l'entreprise :*

moins de 2 ans : .....|\_\_\_\_\_|

entre 2 et 5 ans : .....|\_\_\_\_\_|

plus de 5 ans : .....|\_\_\_\_\_|

*par durée du travail :*

temps plein : .....|\_\_\_\_\_|

temps partiel : .....|\_\_\_\_\_|

**③. Activité : Nombre de missions réalisées pendant l'exercice comptable 1995**

*(répartition selon le montant du salaire annuel proposé)*

| Salaire annuel | Nombre de contrats<br>(Conseil en | Nombre de contrats<br>(outplacement) |
|----------------|-----------------------------------|--------------------------------------|
| Inférieur à    |                                   |                                      |
| 100KF£..< 200  |                                   |                                      |
| 200 KF£..< 300 |                                   |                                      |
| 300 KF£..< 450 |                                   |                                      |
| 450 KF£..< 600 |                                   |                                      |
| Supérieur à    |                                   |                                      |
| Total          |                                   |                                      |

**5 - Investissements de l'exercice 1995**

Montant des investissements corporels .....|\_\_\_\_\_|

Dont : équipement informatique .....|\_\_\_\_\_|

**6 - Mode de facturation**

**a. Mode usuel de facturation :**

forfait ☐ % du salaire proposé ☐ taux horaire ☐ autres ☐

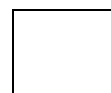
**b. Échéancier des paiements :**

Acompte à la signature du contrat oui ☐ non ☐

*Si oui, merci d'indiquer : le % du total demandé à la signature*

|\_\_\_\_\_|

*le nombre d'échéances.....|\_\_\_\_\_|*





- ☐ c. Paiement au résultat (dit « Contingency system ») oui ☐ non
- ☐ Autres (*veuillez préciser*) .....

## 7 - Moyens utilisés

Disposez-vous dans l'entreprise d'un fichier informatisé de candidats ? oui ☐ non

Avez-vous accès à une base de candidats extérieure à l'entreprise ? oui ☐ non

