

**Manpower
Employment
Outlook Survey
Czech Republic**

**Q2
2016**



Czech Republic Employment Outlook

The Manpower Employment Outlook Survey for the second quarter 2016 was conducted by interviewing a representative sample of 753 employers in the Czech Republic. All survey participants were asked, “How do you anticipate total employment at your location to change in the three months to the end of June 2016 as compared to the current quarter?”

Contents

Country Employment Outlook	1
Organisation-Size Comparisons	
Regional Comparisons	
Sector Comparisons	
Global Employment Outlook	13
International Comparisons – Asia Pacific	
International Comparisons – Americas	
International Comparisons – EMEA	
About the Survey	28
About ManpowerGroup™	29

Czech Republic Employment Outlook

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
Apr-June 2016	7	3	89	1	4	2
Jan-Mar 2016	7	7	85	1	0	3
Oct-Dec 2015	6	4	86	3	1	3
July-Sep 2015	9	2	88	1	7	4
Apr-June 2015	7	3	88	2	4	4



Czech employers report conservative hiring intentions for 2Q 2016. With 7% of employers forecasting an increase in staffing levels, 3% anticipating a decrease and 89% expecting no change, the resulting Net Employment Outlook is +4%.

Once the data is adjusted to allow for seasonal variation, the Outlook stands at +2%. Hiring prospects remain relatively stable when compared with the previous quarter but decline by 2 percentage points year-over-year.

Throughout this report, we use the term "Net Employment Outlook." This figure is derived by taking the percentage of employers anticipating total employment to increase and subtracting from this the percentage expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook.

From this point forward, all data discussed in the commentary is seasonally adjusted, unless stated otherwise.

Organisation-Size Comparisons

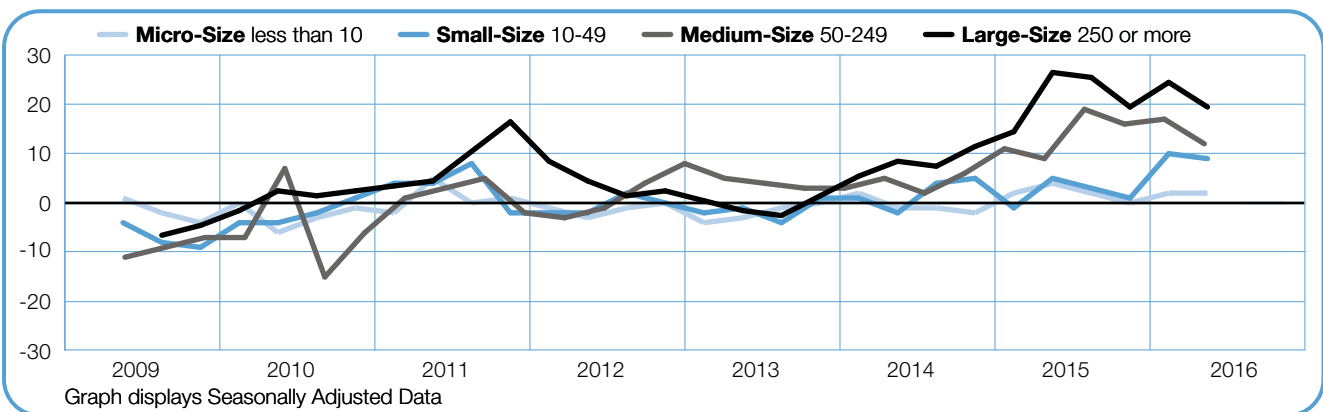
Participating employers are categorized into one of four organization sizes: Micro businesses have less than 10 employees; Small businesses have 10-49 employees; Medium businesses have 50-249 employees; and Large businesses have 250 or more employees.

Job gains are anticipated in all four organization size categories during the next three months. The strongest labor market is forecast by Large employers who report a Net Employment Outlook of +20%. Medium-size employers expect steady payroll gains with an Outlook of +12%, while Outlooks stand at +9% and +2% in the Small- and Micro-size categories, respectively.

Quarter-over-quarter, Outlooks decline by 5 percentage points for both the Large- and Medium-size employers. Small employers report relatively stable hiring plans and the Outlook for Micro firms is unchanged.

When compared with 2Q 2015, slight improvements of 4 and 3 percentage points are reported by Small- and Medium-size employers, respectively. However, the Outlook for Large employers is 7 percentage points weaker and Micro employers report a decline of 2 percentage points.

Organisation-Size	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
	%	%	%	%	%	%
Micro-Size less than 10	6	2	90	2	4	2
Small-Size 10-49	11	2	86	1	9	9
Medium-Size 50-249	14	4	81	1	10	12
Large-Size 250 or more	26	2	70	2	24	20



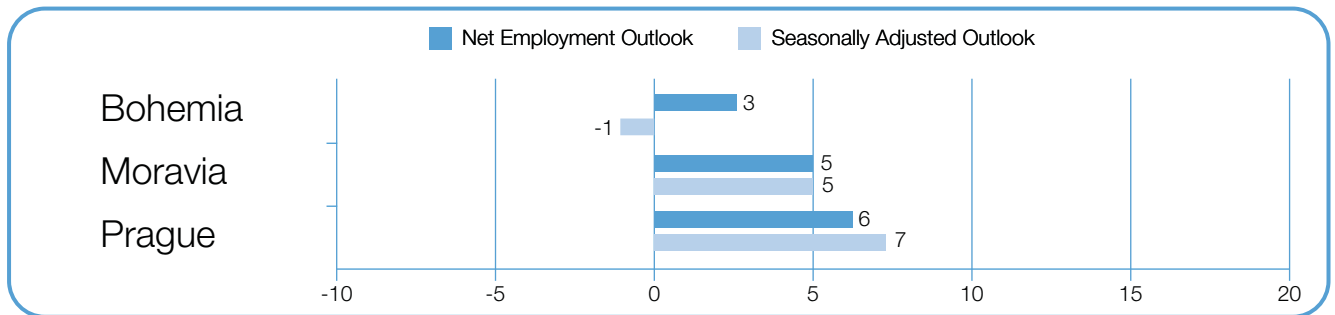
Regional Comparisons

Job gains are forecast by employers in two of the three regions in the April-June time frame. Prague employers report encouraging signs for job seekers with a Net Employment Outlook of +7%, while the Outlook for Moravia stands at +5%. However, Bohemia employers anticipate an uncertain hiring climate with an Outlook of -1%.

When compared with the previous quarter, Prague employers report an improvement of 4 percentage

points, but the Outlook for Bohemia is 3 percentage points weaker. Moravia employers report relatively stable hiring intentions.

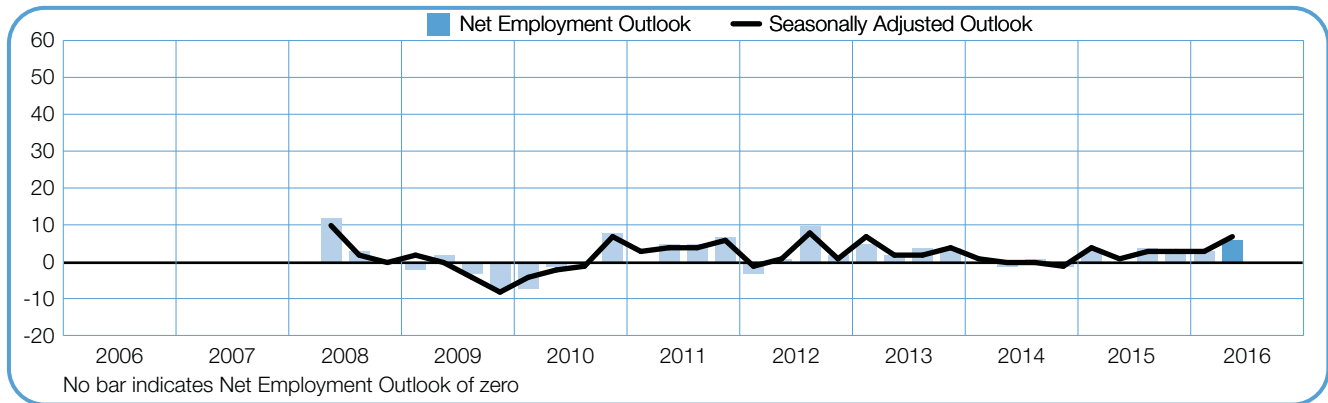
Year-over-year, Outlooks are 4 percentage points weaker in both Bohemia and Moravia. However, Prague employers report an improvement of 6 percentage points.



+7 (+6)%

Prague

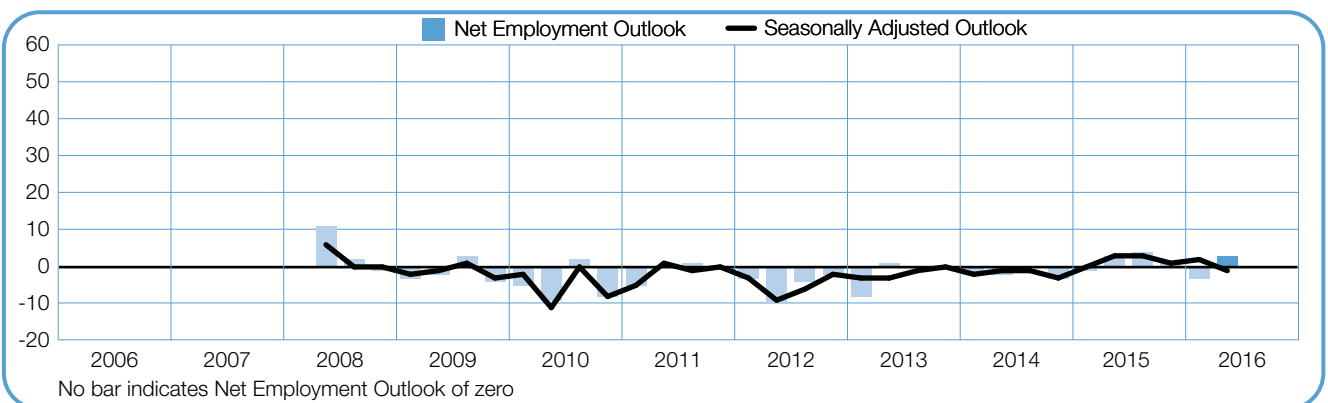
A fair hiring climate is forecast for the upcoming quarter with employers reporting a Net Employment Outlook of +7%. The Outlook is the strongest reported since 1Q 2013, improving by 4 and 6 percentage points quarter-over-quarter and year-over-year, respectively.



-1 (+3)%

Bohemia

Employers anticipate subdued hiring activity during 2Q 2016, reporting a Net Employment Outlook of -1%. Hiring intentions decline by 3 percentage points when compared with the previous quarter and are 4 percentage points weaker year-over-year.



+5 (+5)%

Moravia

Some payroll gains are likely in the next three months, according to employers who report a Net Employment Outlook of +5%. Hiring prospects remain relatively stable quarter-over-quarter but are 4 percentage points weaker year-over-year.



Sector Comparisons

Employers in seven of the 10 industry sectors expect payrolls to grow during the April-June time frame.

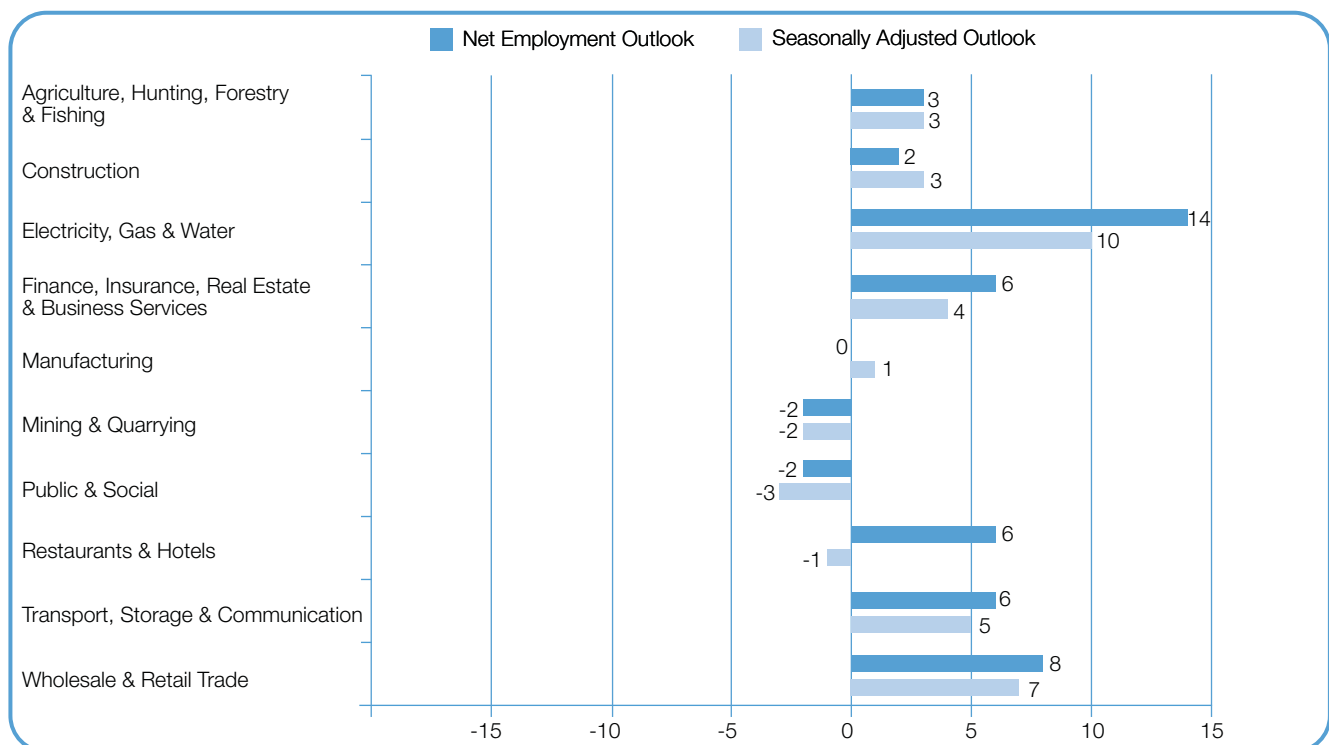
Electricity, Gas & Water Supply sector employers anticipate the strongest labor market, reporting a Net Employment Outlook of +10%. Elsewhere, Wholesale & Retail Trade sector employers report encouraging signs for job seekers with an Outlook of +7%, while the Outlook for the Transport, Storage & Communication sector stands at +5%.

Meanwhile, employers in three sectors forecast a decline in staffing levels, including the Public & Social sector and the Mining & Quarrying sector, with Outlooks of -3% and -2%, respectively.

When compared with the previous quarter, hiring prospects improve in six of the 10 industry sectors. A considerable increase of 11 percentage points is reported for the Agriculture, Hunting, Forestry & Fishing sector, while the Mining & Quarrying sector

Outlook is 4 percentage points stronger. However, hiring intentions weaken in three sectors, most notably by 10 percentage points in the Public & Social sector, and by 3 percentage points in the Restaurants & Hotels sector.

Year-over-year, Outlooks strengthen in five of the 10 industry sectors. The most noteworthy increases of 5 percentage points are reported in the Electricity, Gas & Water Supply sector and the Transport, Storage & Communication sector, while hiring prospects are 4 percentage points stronger in both the Mining & Quarrying sector and the Wholesale & Retail Trade sector. Elsewhere, hiring intentions weaken in five sectors. Manufacturing sector employers report a decrease of 6 percentage points while the Outlook for the Agriculture, Hunting, Forestry & Fishing sector is 4 percentage points weaker.



+3 (+3)%

Agriculture, Hunting, Forestry & Fishing

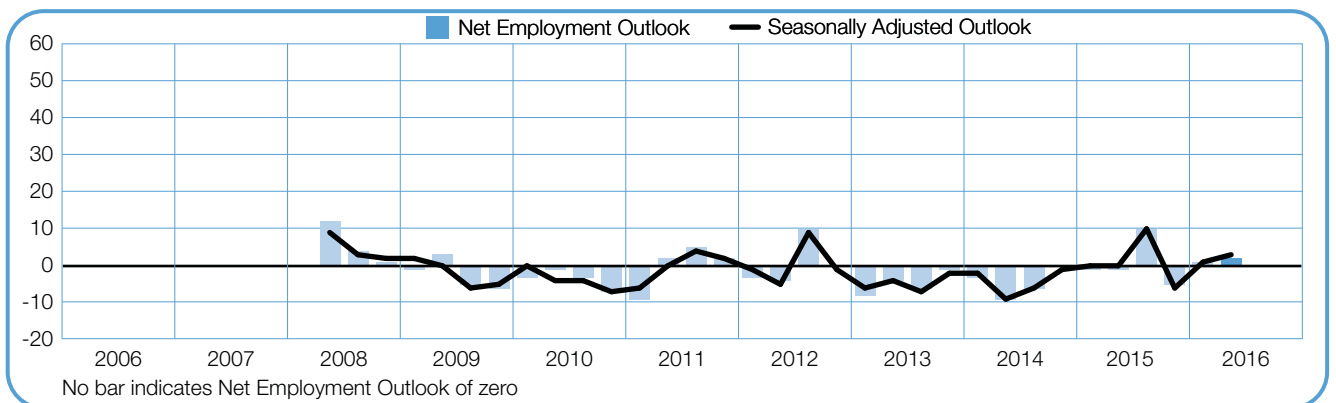
Job seekers can expect slow-paced hiring activity during the coming quarter, according to employers who report a Net Employment Outlook of +3%. Hiring prospects are 11 percentage points stronger when compared with the previous quarter but decline by 4 percentage points year-over-year.



+3 (+2)%

Construction

Reporting a Net Employment Outlook of +3%, employers anticipate some payroll gains during 2Q 2016. Hiring plans are 2 percentage points stronger quarter-over-quarter and improve by 3 percentage points year-over-year.



+10 (+14)%

Electricity, Gas & Water

Employers report cautiously optimistic hiring intentions for the April-June time frame with a Net Employment Outlook of +10%. While the Outlook is 2 percentage points weaker quarter-over-quarter, employers report a year-over-year improvement of 5 percentage points.



+4 (+6)%

Finance, Insurance, Real Estate & Business Services

The conservative hiring pace is forecast to continue in the next three months with employers reporting a Net Employment Outlook of +4% for the second consecutive quarter. Year-over-year, hiring prospects remain relatively stable.



+1 (0)%

Manufacturing

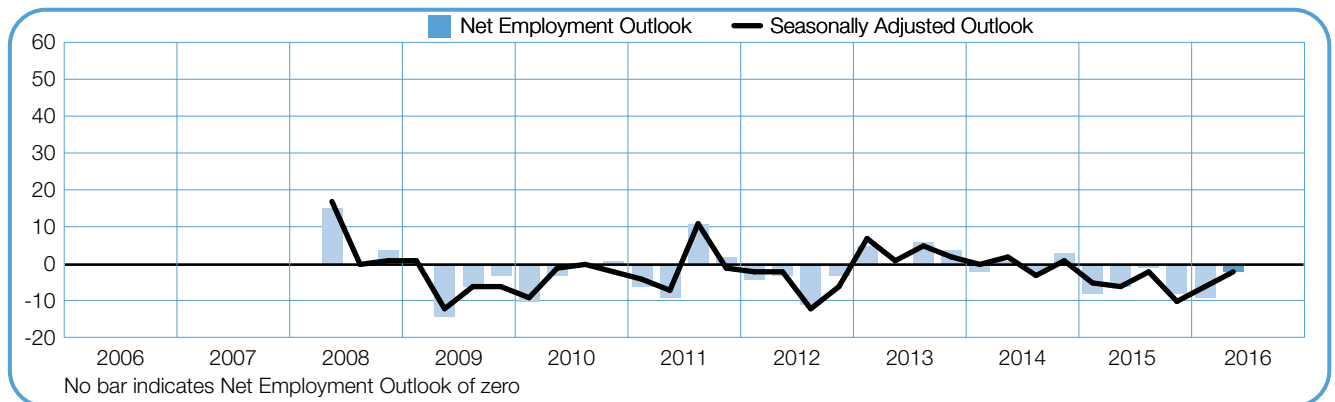
Job seekers can expect a quiet hiring climate in 2Q 2016 with employers reporting a Net Employment Outlook of +1%. The Outlook is 2 percentage points stronger when compared with the previous quarter but declines by 6 percentage points year-over-year.



-2 (-2)%

Mining & Quarrying

The labor market is likely to continue to struggle in the coming quarter, according to employers who report a Net Employment Outlook of -2%. Hiring intentions have now been negative for six consecutive quarters. However, the Outlook improves by 4 percentage points both quarter-over-quarter and year-over-year.



-3 (-2)%

Public & Social

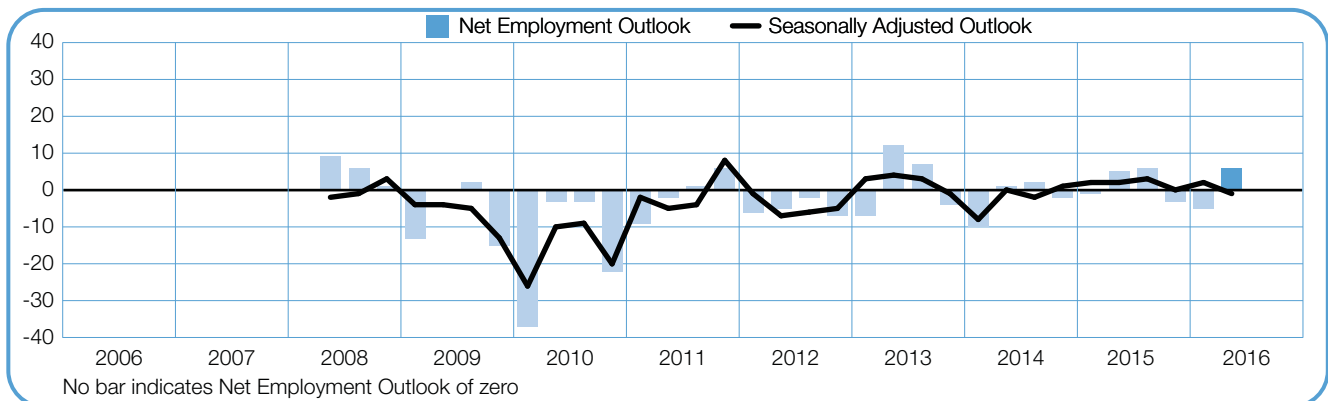
Employers report muted hiring plans for the April-June time frame with a Net Employment Outlook of -3%. Employers report a considerable decline of 10 percentage points when compared with the previous quarter and the Outlook is also 2 percentage points weaker year-over-year.



-1 (+6)%

Restaurants & Hotels

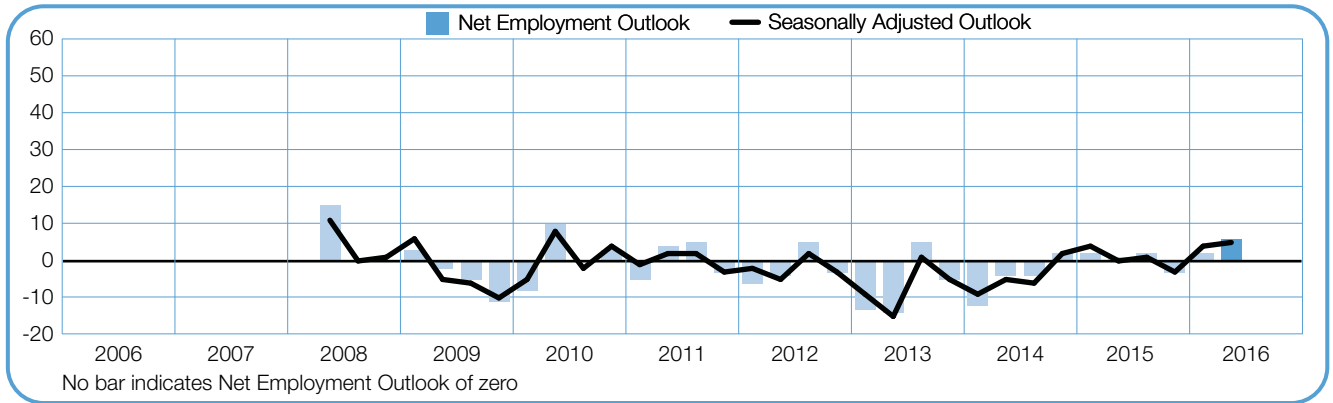
Subdued hiring activity is forecast for 2Q 2016 with employers reporting a Net Employment Outlook of -1%. Hiring prospects are 3 percentage points weaker both quarter-over-quarter and year-over-year.



+5 (+6)%

Transport, Storage & Communication

With a Net Employment Outlook of +5%, employers report the strongest hiring intentions since 2Q 2010 for the upcoming quarter. The Outlook remains relatively stable quarter-over-quarter and is 5 percentage points stronger when compared with 2Q 2015.



+7 (+8)%

Wholesale & Retail Trade

Employers continue to report encouraging signs for job seekers with a Net Employment Outlook for 2Q 2016 of +7%. Hiring prospects are 2 percentage points stronger when compared with the previous quarter and improve by 4 percentage points year-over-year.



The Manpower Employment Outlook Survey is ManpowerGroup's quarterly index of employer hiring confidence.

ManpowerGroup interviewed over 58,000 employers across 42 countries and territories to forecast labor market activity* in Quarter 2 2016. All participants were asked, "How do you anticipate total employment at your location to change in the three months to the end of June 2016 as compared to the current quarter?"

ManpowerGroup's second-quarter research reveals that job gains are expected in 39 of 42 countries and territories during the April-June time frame. However, despite little indication of labor market contraction, hiring intentions in most countries and territories continue to remain modest. In fact, some key labor markets, such as Germany, France and Italy, are clearly struggling to gain traction amid the current economic uncertainty. Faced with the slowdown in China and ongoing turmoil in commodity markets, most employers across the globe appear to be taking the measured approach of adding staff only when needed.

Despite some anticipated job gains, actual job growth is expected to slow by varying degrees with employers in a slim majority of countries and territories scaling back their hiring plans in both quarter-over-quarter and year-over-year comparisons. Hiring plans strengthen in only eight of 42 countries and territories when compared with the first three months of 2016 and weaken in 22. Outlooks improve in 12 countries and territories when compared with Quarter 2 2015 but decline in 23. Second-quarter hiring confidence is strongest in India, Japan, Taiwan, Colombia and Guatemala, while the weakest hiring prospects are reported in Brazil, France and Italy.

Across the Europe, Middle East & Africa (EMEA) region, workforce gains are forecast in 22 of 24 countries. Hiring plans improve in five countries quarter-over-quarter but weaken in 11. In a year-over-year comparison, job gains are expected to improve in six countries and decline in 13. For the first time in the EMEA region, employers in Bulgaria report the most optimistic hiring intentions. Conversely, French employers report the weakest hiring plans, as well as the only negative forecast in EMEA.

Staffing levels are expected to grow in all eight Asia Pacific countries and territories during the April-June time frame. However, second-quarter forecasts weaken in seven countries and territories when compared with the first three months of the year. Similarly, hiring plans decline by varying margins in seven countries and territories in a year-over-year comparison and strengthen only in Japan. For the third consecutive quarter, employers in India report the most optimistic regional and global hiring plans, while the region's weakest hiring intentions are reported by Australian employers.

Employers in nine of 10 countries in the Americas region expect some workforce gains in the upcoming quarter. Outlooks improve in three countries and decline in four in a quarter-over-quarter comparison. Year-over-year, hiring prospects are stronger in five countries and decline in only three. Employers in Colombia, Guatemala and the United States report the region's most optimistic second-quarter hiring plans, while for the fifth consecutive quarter employers in Brazil report an overall decline in payrolls as well as the weakest hiring plans in the region and across the globe.

Full survey results for each of the 42 countries and territories included in this quarter's survey, plus regional and global comparisons, can be found at www.manpowergroup.com/meos. The next Manpower Employment Outlook Survey will be released on 14 June 2016 and will detail expected labor market activity for the third quarter of 2016.

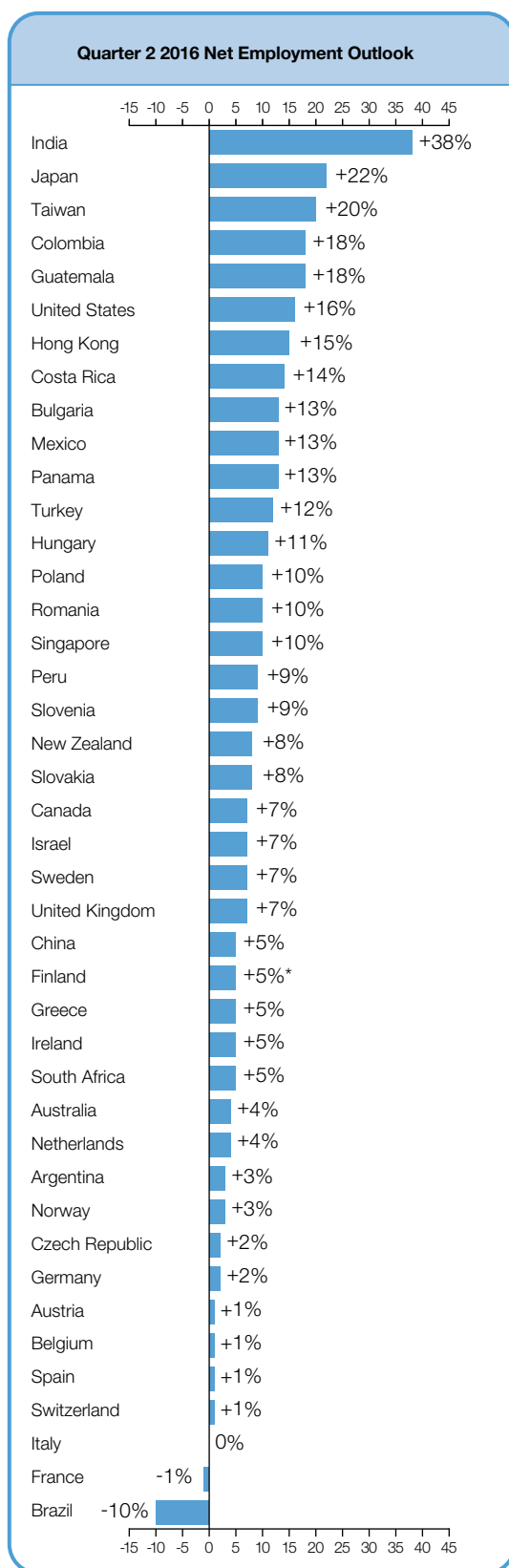
* Commentary is based on seasonally adjusted data where available. Data is not seasonally adjusted for Finland.

Global Employment Outlook

	Quarter 2 2016	Qtr on Qtr Change Q1 2016 to Q2 2016	Yr on Yr Change Q2 2015 to Q2 2016
	%		
Americas			
Argentina	6 (3) ¹	-2 (-5) ¹	0 (0) ¹
Brazil	-5 (-10) ¹	5 (-2) ¹	-8 (-8) ¹
Canada	10 (7) ¹	8 (0) ¹	-3 (-3) ¹
Colombia	19 (18) ¹	9 (7) ¹	4 (3) ¹
Costa Rica	17 (14) ¹	1 (-2) ¹	6 (4) ¹
Guatemala	18 (18) ¹	3 (3) ¹	8 (8) ¹
Mexico	14 (13) ¹	3 (0) ¹	2 (2) ¹
Panama	13 (13) ¹	2 (1) ¹	-4 (-4) ¹
Peru	10 (9) ¹	2 (0) ¹	2 (1) ¹
United States	18 (16) ¹	4 (-1) ¹	0 (0) ¹

Asia Pacific			
Australia	6 (4) ¹	-2 (-4) ¹	-4 (-4) ¹
China	5 (5) ¹	-2 (-2) ¹	-4 (-4) ¹
Hong Kong	14 (15) ¹	-1 (0) ¹	-1 (-1) ¹
India	39 (38) ¹	-1 (-3) ¹	-2 (-2) ¹
Japan	29 (22) ¹	8 (-1) ¹	0 (1) ¹
New Zealand	10 (8) ¹	-1 (-3) ¹	-9 (-9) ¹
Singapore	10 (10) ¹	1 (-1) ¹	-4 (-4) ¹
Taiwan	21 (20) ¹	0 (-7) ¹	-25 (-25) ¹

EMEA†			
Austria	3 (1) ¹	3 (-3) ¹	0 (0) ¹
Belgium	2 (1) ¹	1 (0) ¹	-1 (-1) ¹
Bulgaria	19 (13) ¹	14 (2) ¹	5 (4) ¹
Czech Republic	4 (2) ¹	4 (-1) ¹	0 (-2) ¹
Finland	5	11	-6
France	-1 (-1) ¹	1 (0) ¹	-2 (-2) ¹
Germany	3 (2) ¹	3 (-1) ¹	-3 (-3) ¹
Greece	10 (5) ¹	10 (0) ¹	-4 (-4) ¹
Hungary	13 (11) ¹	4 (-1) ¹	0 (0) ¹
Ireland	7 (5) ¹	0 (-3) ¹	-1 (-1) ¹
Israel	9 (7) ¹	4 (1) ¹	-1 (-1) ¹
Italy	2 (0) ¹	3 (-1) ¹	6 (6) ¹
Netherlands	4 (4) ¹	1 (0) ¹	0 (0) ¹
Norway	3 (3) ¹	-1 (-1) ¹	0 (0) ¹
Poland	12 (10) ¹	7 (0) ¹	3 (3) ¹
Romania	19 (10) ¹	18 (-1) ¹	-1 (-1) ¹
Slovakia	8 (8) ¹	-2 (-4) ¹	0 (0) ¹
Slovenia	13 (9) ¹	13 (5) ¹	1 (1) ¹
South Africa	5 (5) ¹	-2 (0) ¹	-6 (-6) ¹
Spain	3 (1) ¹	2 (-2) ¹	-2 (-3) ¹
Sweden	9 (7) ¹	5 (2) ¹	3 (3) ¹
Switzerland	3 (1) ¹	3 (0) ¹	-3 (-3) ¹
Turkey	16 (12) ¹	5 (-3) ¹	-5 (-5) ¹
UK	7 (7) ¹	2 (0) ¹	1 (1) ¹



†EMEA – Europe, Middle East and Africa.

* Indicates unadjusted data.

1. Number in parentheses is the Net Employment Outlook when adjusted to remove the impact of seasonal variations in hiring activity. Please note that this data is not available for all countries as a minimum of 17 quarters worth of data is required.

International Comparisons – Americas

The Quarter 2 2016 survey is based on interviews with over 23,000 employers from 10 countries across North, Central and South America. Among the 10 countries, only employers in Brazil expect payrolls to decline during the April-June time frame. Forecasts improve in three countries when compared to first-quarter results, are unchanged in three countries, and slip by varying degrees in four. In a year-over-year comparison, employer hiring intentions improve in five countries, are unchanged in two and decline in three.

Employers in Colombia and Guatemala report the region’s most optimistic second-quarter hiring plans, with forecasts in both countries improving from three months ago and last year at this time. The Colombian forecast is partly fueled by growing confidence in the Construction sector where employers project the brightest opportunities for job seekers since the sector was first separately analyzed in Quarter 1 2013. A similarly favorable hiring environment is expected in Guatemala where nearly one of every four employers report that they intend to hire in the next three months, boosting that country’s forecast to its most optimistic level since the survey began here in Quarter 2 2008.

The U.S. forecast also remains upbeat with employers in all 13 industry sectors and four geographic regions expecting payrolls to grow by varying degrees during the next three months. As they have for the past three years, employers in the Leisure & Hospitality industry sector report the strongest hiring intentions with nearly four of every 10 employers intending to add to payrolls

in the second quarter.

Employer confidence in Mexico remains positive with workforce gains expected in all industry sectors and regions. The strongest hiring plans are reported by employers in the Manufacturing and the Transport & Communications sectors where approximately one in every five employers expects job gains in the second quarter. Even employers in the Mining & Extraction sector remain cautiously optimistic despite ongoing price pressures in oil and commodities.

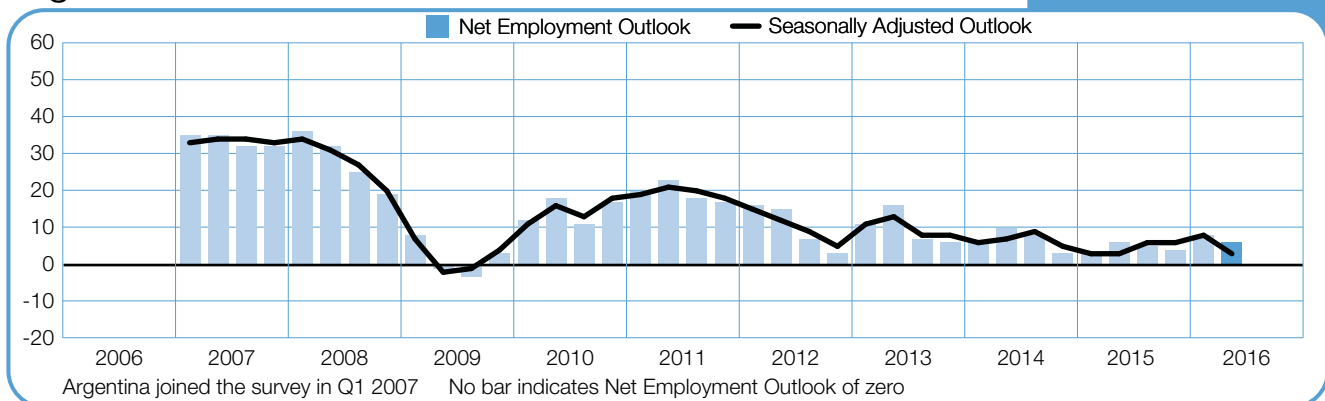
Canada’s Net Employment Outlook is unchanged from three months ago and slightly weaker than last year at this time. However, the forecast for the country’s Manufacturing-Durables sector declines considerably in both quarter-over-quarter and year-over-year comparisons as expected manufacturing gains associated with the weaker Canadian dollar have evidently not yet materialized.

Elsewhere, the hiring pace is expected to remain steady in Costa Rica and Panama, while modest job gains are expected in both Peru and Argentina.

The least optimistic hiring plans—in the Americas as well as across the globe—are reported in Brazil where opportunities for job seekers continue to dwindle. Brazil’s Net Employment Outlook continues the steady decline that started in Quarter 4 2011. As a result, employer confidence dips again to the least optimistic level since the survey was launched in Quarter 4 2009.

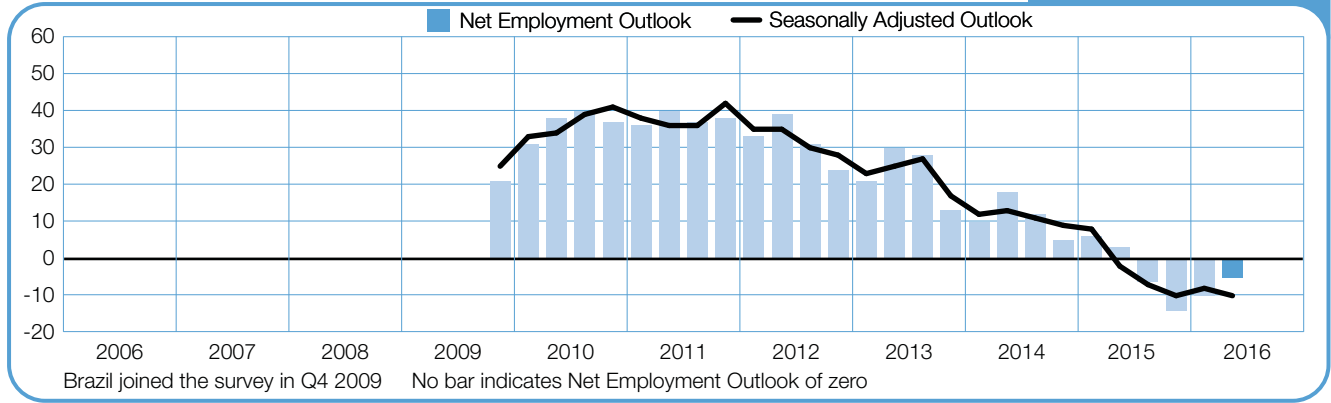
Argentina

+3 (+6)%



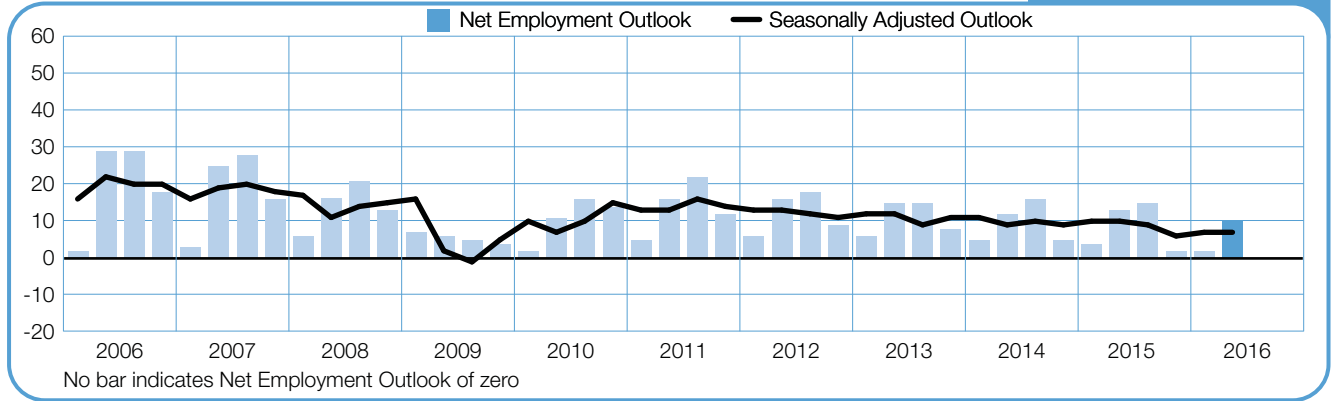
Brazil

-10 (-5)%



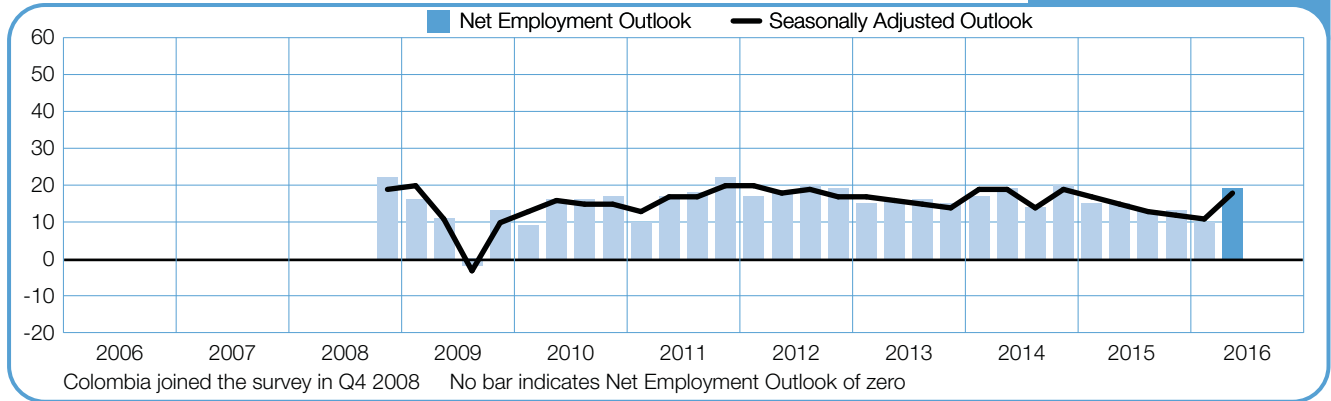
Canada

+7 (+10)%



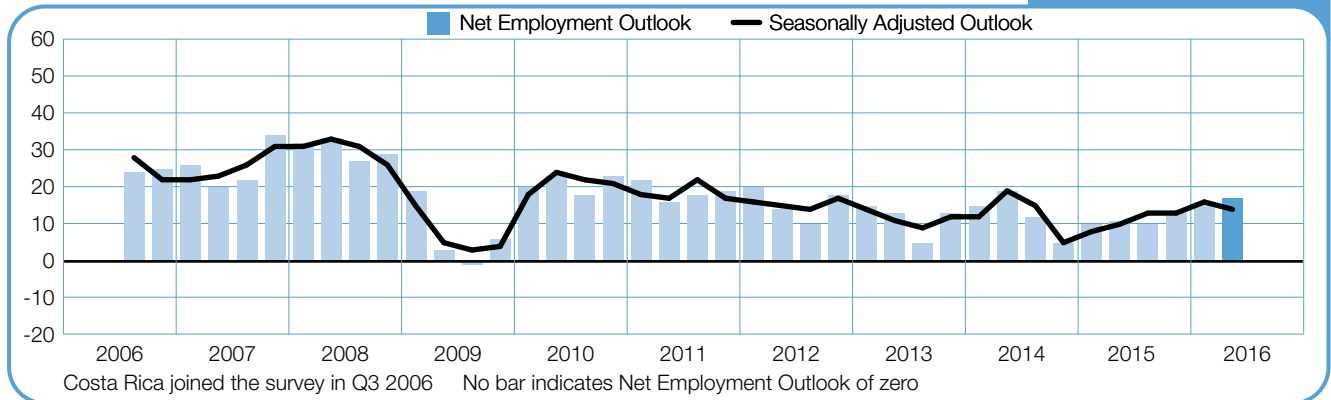
Colombia

+18 (+19)%



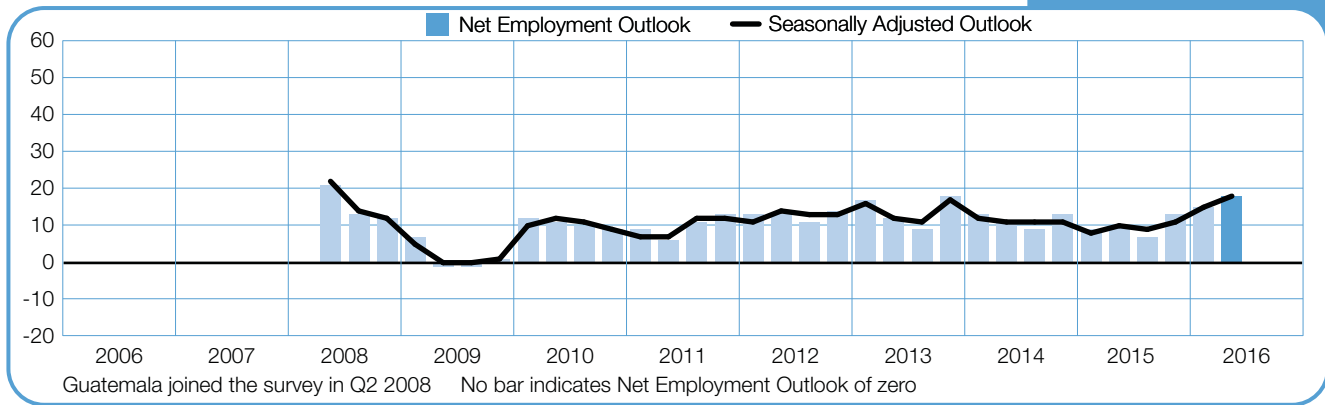
Costa Rica

+14 (+17)%



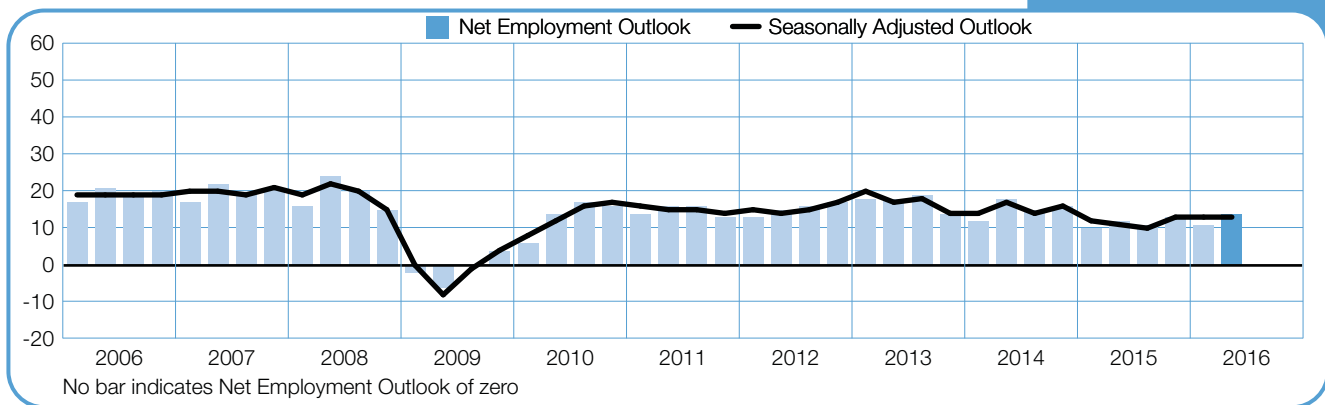
Guatemala

+18 (+18)%



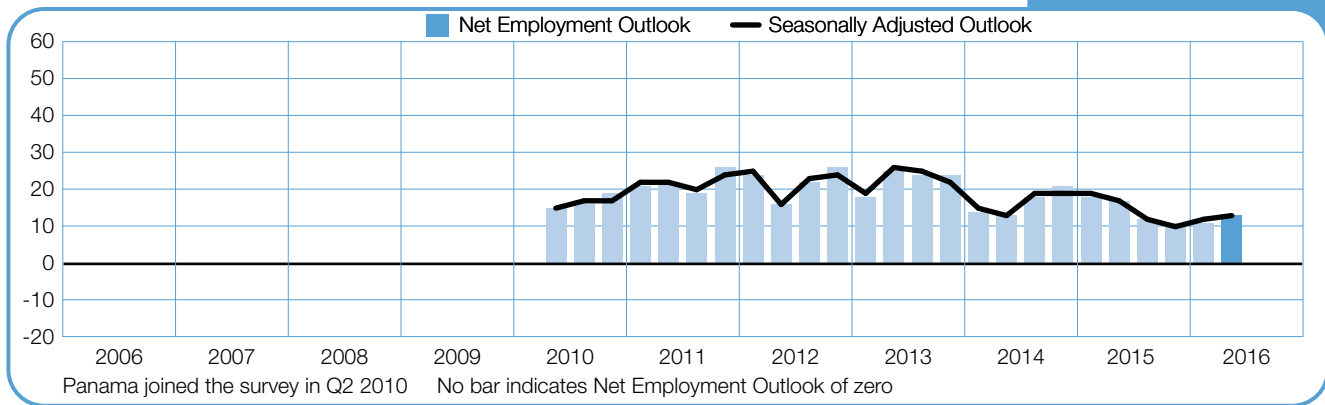
Mexico

+13 (+14)%



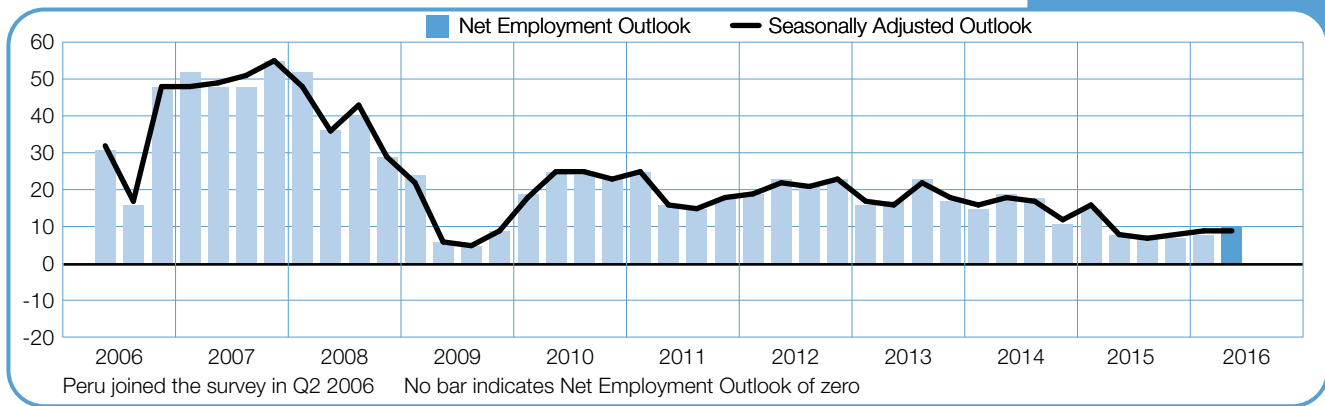
Panama

+13 (+13)%



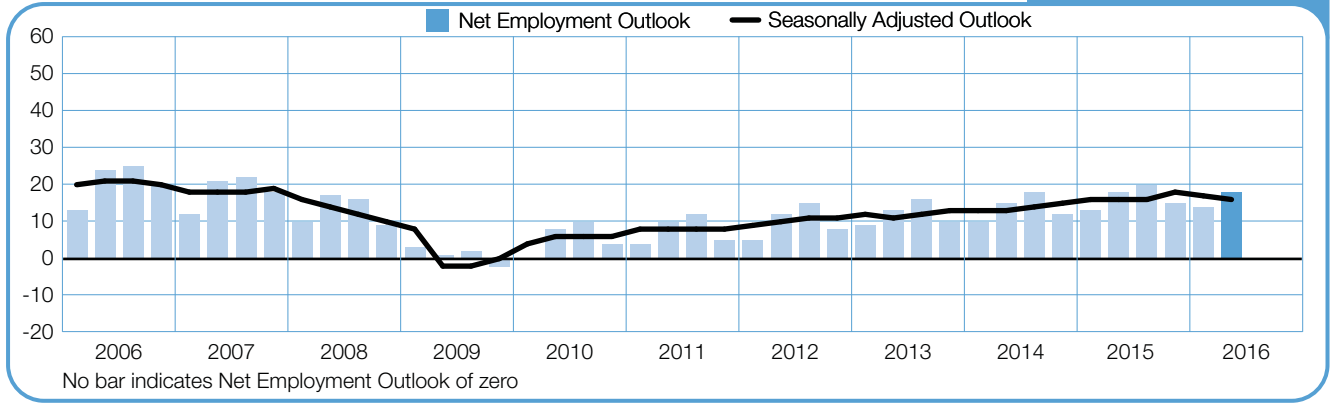
Peru

+9 (+10)%



United States of America

+16 (+18)%



International Comparisons – Asia Pacific

Over 15,000 employers were interviewed in the Asia Pacific region. Employers in each of the eight countries and territories intend to add to their workforces over the next three months. However, the hiring pace is expected to slow in most countries and territories in comparisons to both the prior quarter and last year at this time. Hiring intentions weaken from three months ago in seven countries and territories, and remain unchanged in one. Similarly, when compared to Quarter 2 2015, forecasts weaken in seven and improve in only one. Employers in India and Japan report the strongest second-quarter hiring plans, while those in Australia and China report the weakest.

For the third consecutive quarter, employer confidence in India is stronger than in any of the other 41 countries and territories participating in the survey. Nearly half of employers surveyed expect to add to their payrolls during the April-June time frame, and opportunities for job seekers are expected to be bright in most Indian industry sectors and regions.

Activity in Japan's labor market is expected to remain strong through the end of June. Forecasts indicate that opportunities for job seekers in Japan will remain solid in most industry sectors and regions, as nearly a third of the country's employers indicate they have jobs to fill. However, efforts to fill positions continue to be hampered by the challenge of a rapidly shrinking workforce.

Confidence among Taiwan's employers is expected to be similarly strong. However, the survey indicates the hiring pace will slow for the fourth consecutive quarter. A growing dependence on China in this export-driven market may be discouraging employers from hiring at levels similar to the last several years, and the forecast dips to its least optimistic level since Quarter 4 2009.

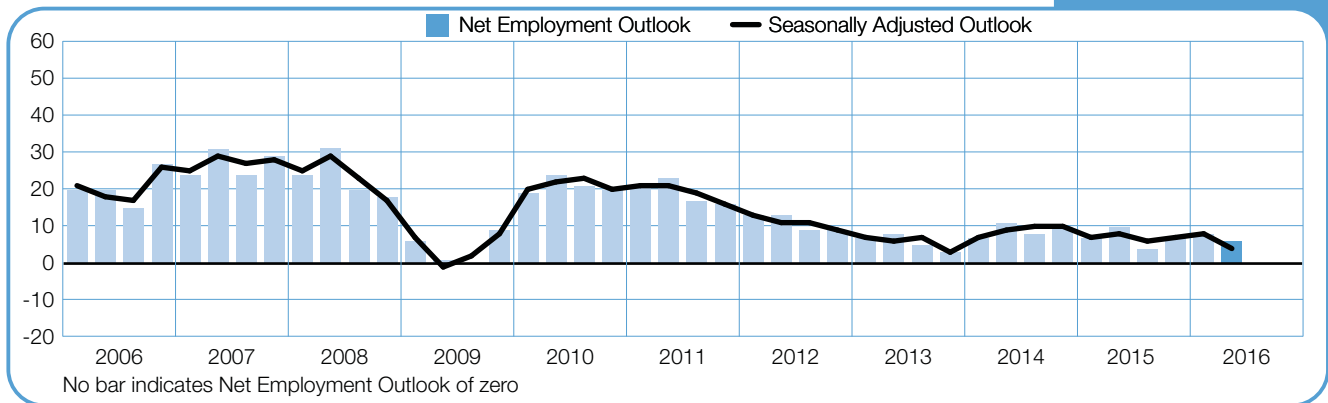
Hong Kong's hiring climate continues to be favorable and job growth has remained relatively stable for eight consecutive quarters, buoyed by a consistently strong Services sector forecast.

Meanwhile, hiring plans in China weaken in comparison to both the prior quarter and Quarter 2 2015. Outlooks are positive in all industry sectors and regions, but are among the weakest reported in the history of the survey. In addition to subdued job growth projections, uncertainty is evidently on the increase as nearly half of the employers surveyed indicate they simply don't know what their second quarter hiring plans will be.

A general slowdown is evident across much of the rest of the region. Outlooks decline by varying margins in quarter-over-quarter and year-over-year comparisons in Australia, New Zealand and Singapore. Australia's Net Employment Outlook is the weakest in two and a half years. In New Zealand job growth is expected to be weaker than at any point since Quarter 4 2009, while the forecast in Singapore drops to its least optimistic level since Quarter 3 2009.

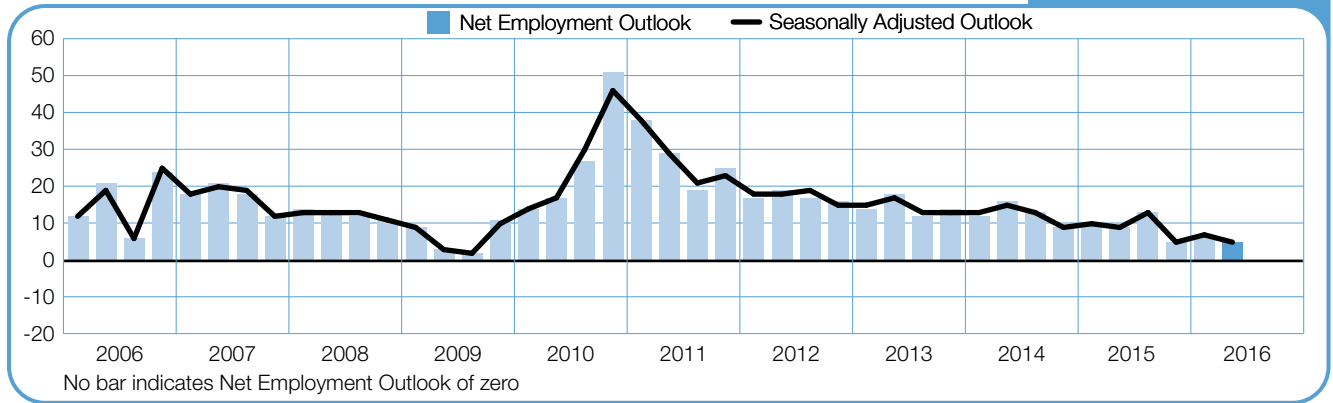
Australia

+4 (+6)%



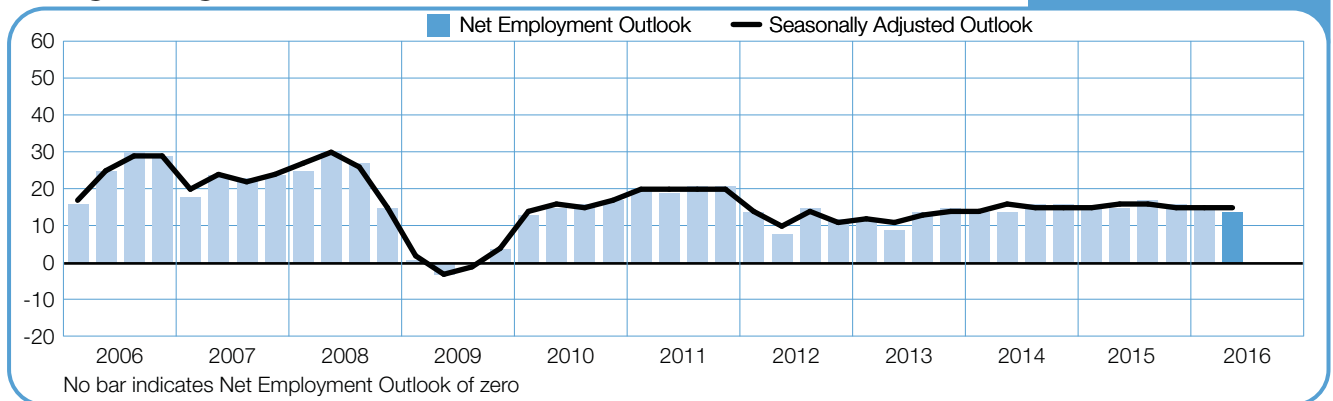
China

+5 (+5)%



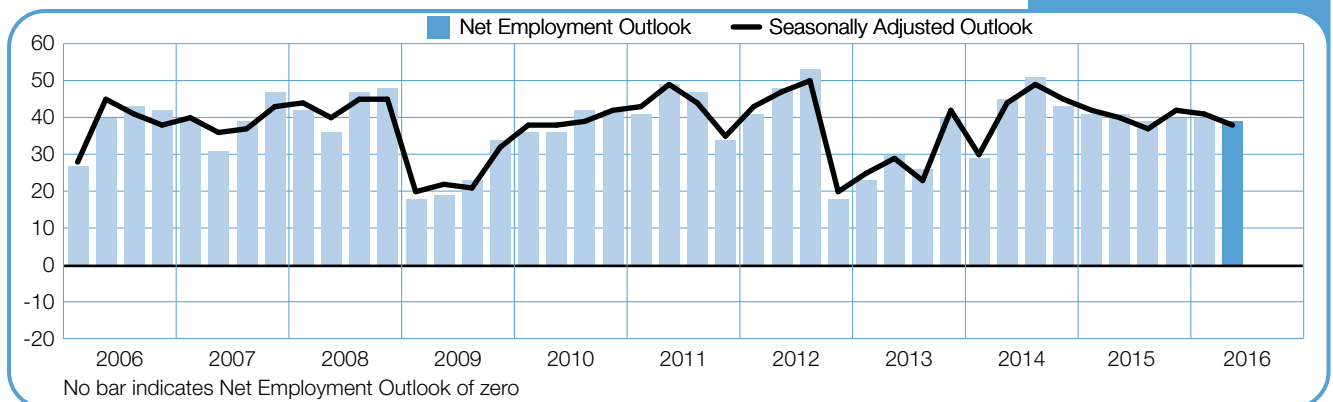
Hong Kong

+15 (+14)%



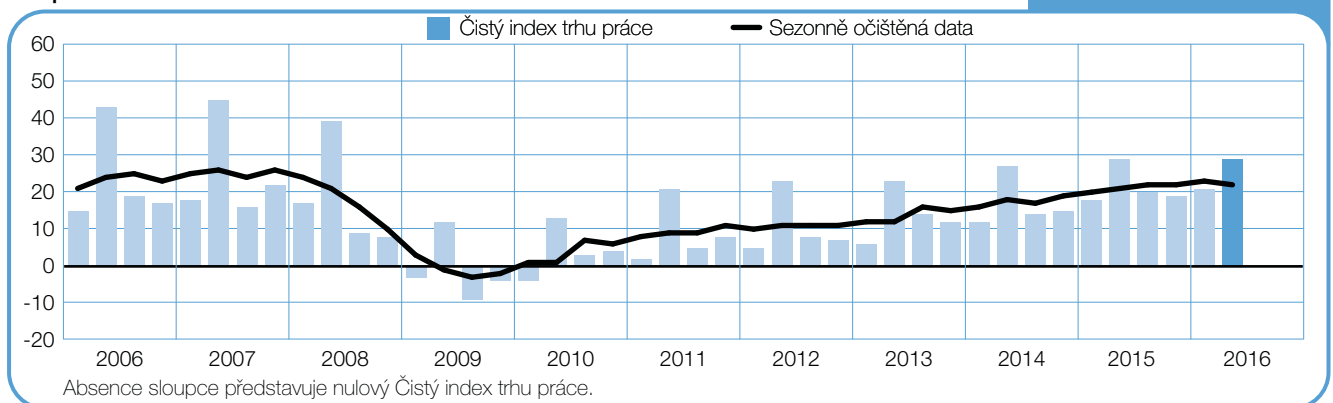
India

+38 (+39)%



Japonsko

+22 (+29)%



New Zealand

+8 (+10)%



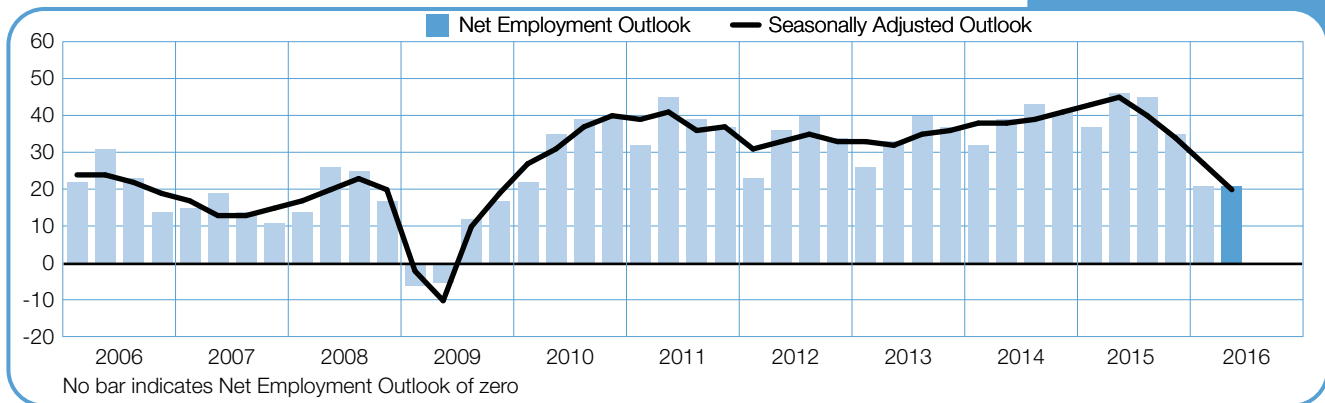
Singapore

+10 (+10)%



Taiwan

+20 (+21)%



International Comparisons – EMEA

ManpowerGroup interviewed nearly 20,000 employers in 24 countries in the Europe, Middle East and Africa (EMEA) region. Outlooks are mostly positive with employers in 22 of 24 countries planning to add to their payrolls in the second quarter. However, in the EMEA region as elsewhere across the globe, forecasts indicate that the hiring pace will be marginally weaker in comparison to the January-March time frame and the second quarter of last year. Employers report weaker hiring intentions in a quarter-over-quarter comparison in 11 countries with forecasts improving in only five. Outlooks decline in 13 countries year-over-year and improve in only six. The region's strongest second-quarter forecast is reported in Bulgaria, while the weakest forecasts are reported by French and Italian employers.

Hiring intentions in Bulgaria climb to the most optimistic level reported by employers since joining the survey at the start of 2011, fueled in part by strong hiring plans in the Manufacturing sector and an upbeat forecast in the Construction sector. The hiring pace in Turkey is expected to be similarly steady. Positive forecasts are reported in all industry sectors and regions, but Turkey's Net Employment Outlook dips to its least optimistic level since the survey was launched there in Quarter 1 2011 and hiring intentions decline in eight of 11 industry sectors both quarter-over-quarter and year-over-year.

Employer confidence is considerably weaker in France. The Net Employment Outlook remains in negative territory for the third consecutive quarter, resistant

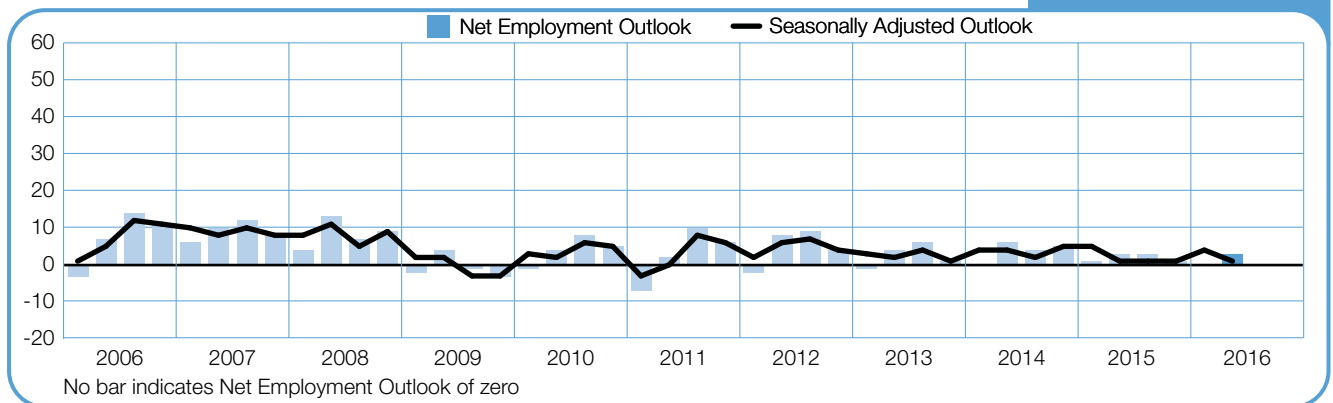
to an encouraging second-quarter surge in the Construction sector where employer confidence improves to its strongest level since Quarter 1 2007. Similarly, the forecast in Italy signals only limited opportunities for job seekers with some gains anticipated by employers in the Wholesale & Retail Trade and Restaurant & Hotel sectors. However, the Net Employment Outlook is relatively stable when compared with the first-quarter results which marked Italy's first positive forecast in nearly five years.

Elsewhere across the region, prospects are more positive. A favorable hiring climate is expected to welcome job seekers during the April-June time frame in Hungary, Poland and Romania. Outlooks remain cautiously optimistic in Slovenia, Slovakia, Israel and Sweden. Positive, but more modest, hiring intentions are reported in most other countries in the EMEA. This includes the UK, where the expected impact from the implementation of the National Living Wage guidelines has yet to materialize and is, as of yet, having little effect on employer hiring plans. The UK forecast indicates job seekers will have some opportunities in the months ahead, with positive hiring intentions reported by employers in all regions and in seven of nine industry sectors.

Meanwhile, talent demand remains restrained in Germany. The Net Employment Outlook continues to be positive but dips to its least optimistic level since Quarter 4 2013 as forecasts decline from year-ago levels in all industry sectors and all but one of eight regions.

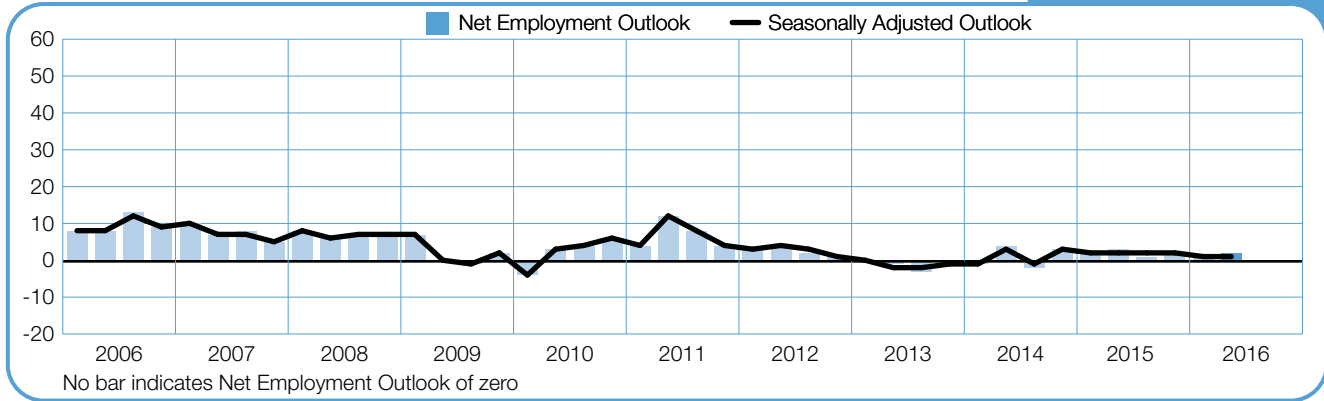
Austria

+1 (+3)%



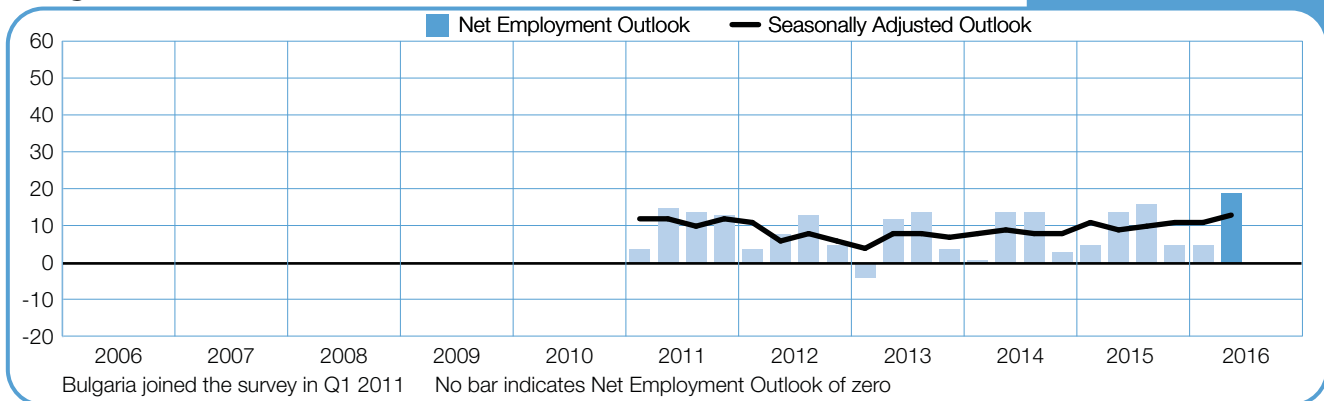
Belgium

+1 (+2)%



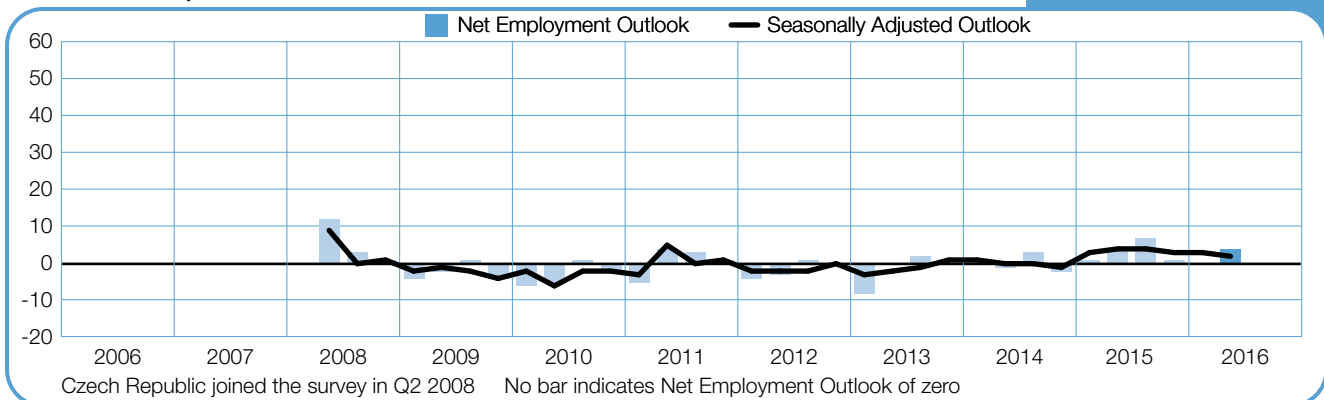
Bulgaria

+13 (+19)%



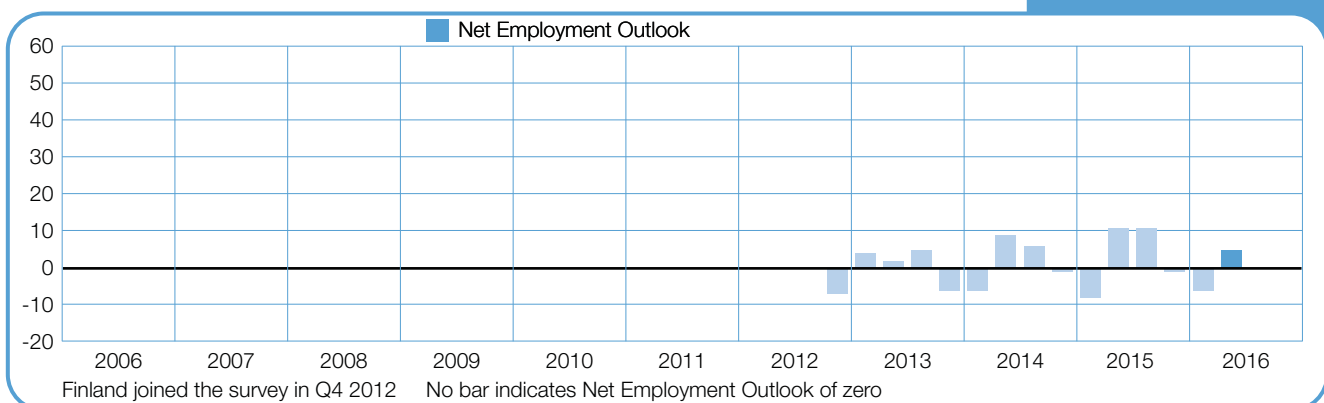
Czech Republic

+2 (+4)%



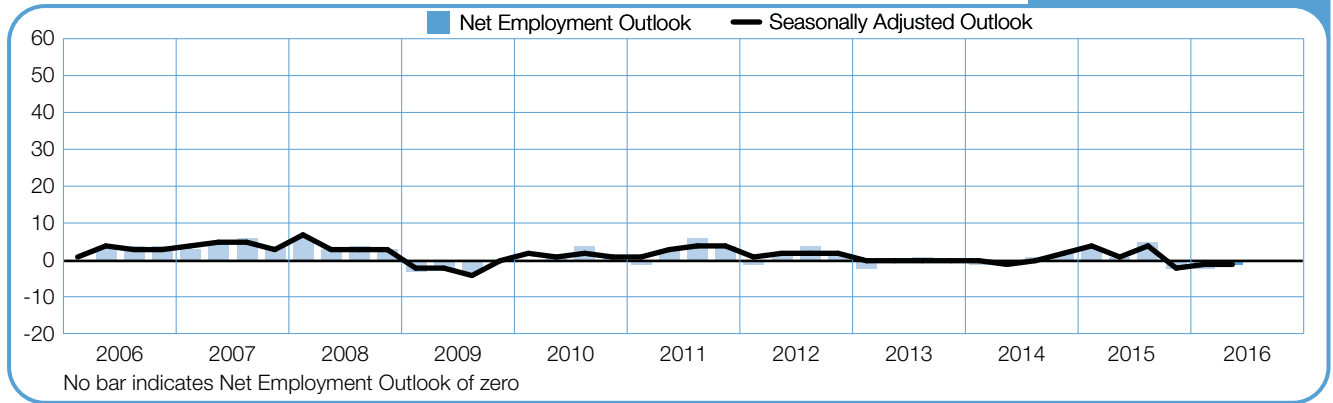
Finland

+5%



France

-1 (-1)%



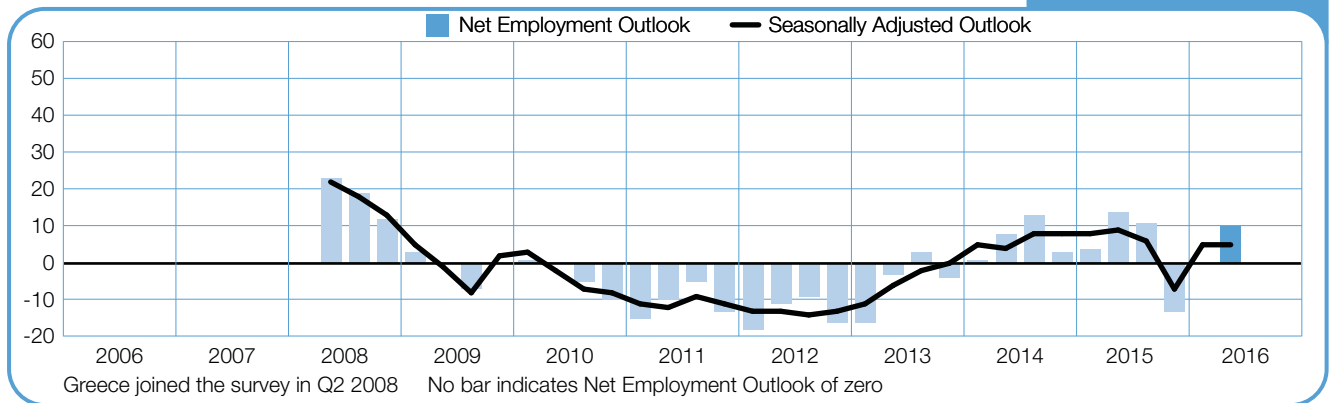
Germany

+2 (+3)%



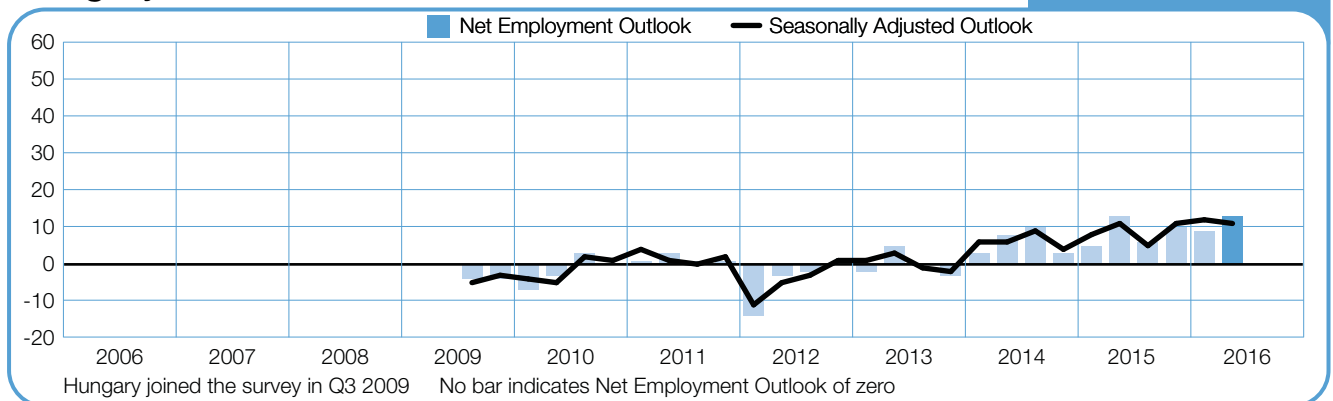
Greece

+5 (+10)%



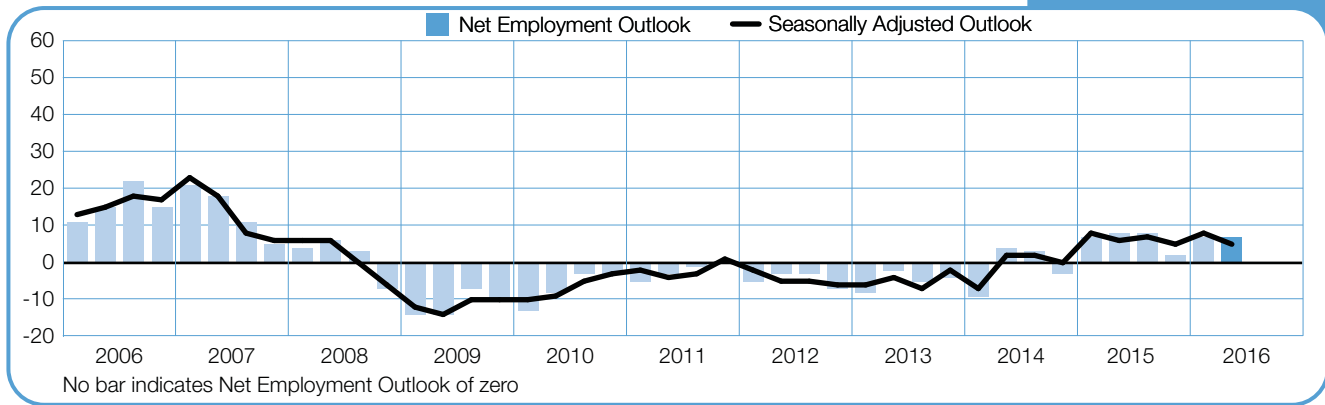
Hungary

+11 (+13)%



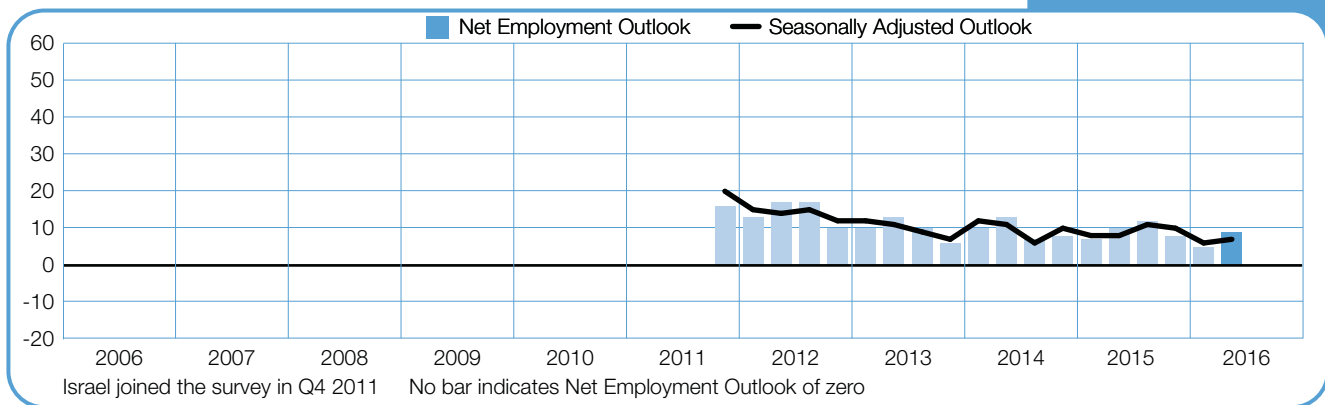
Ireland

+5 (+7)%



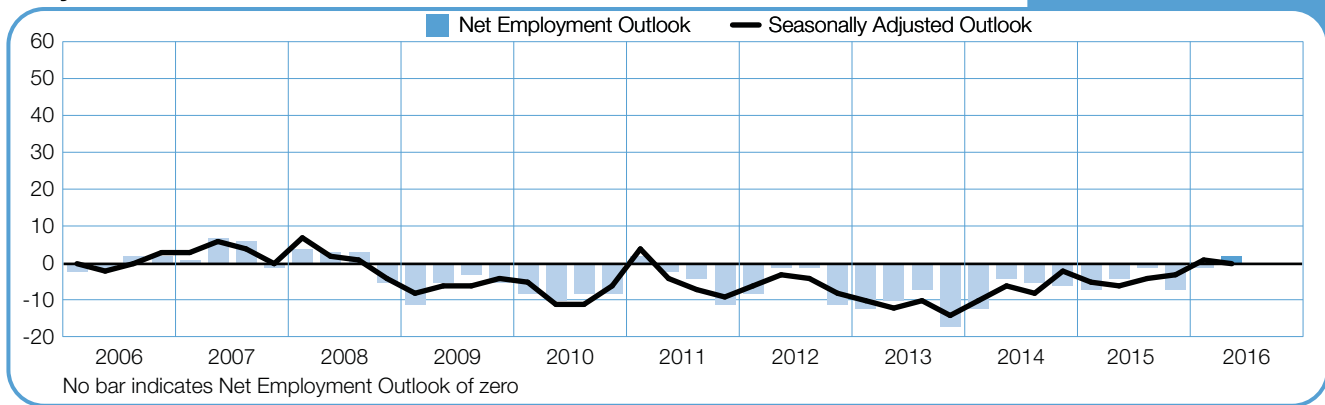
Israel

+7 (+9)%



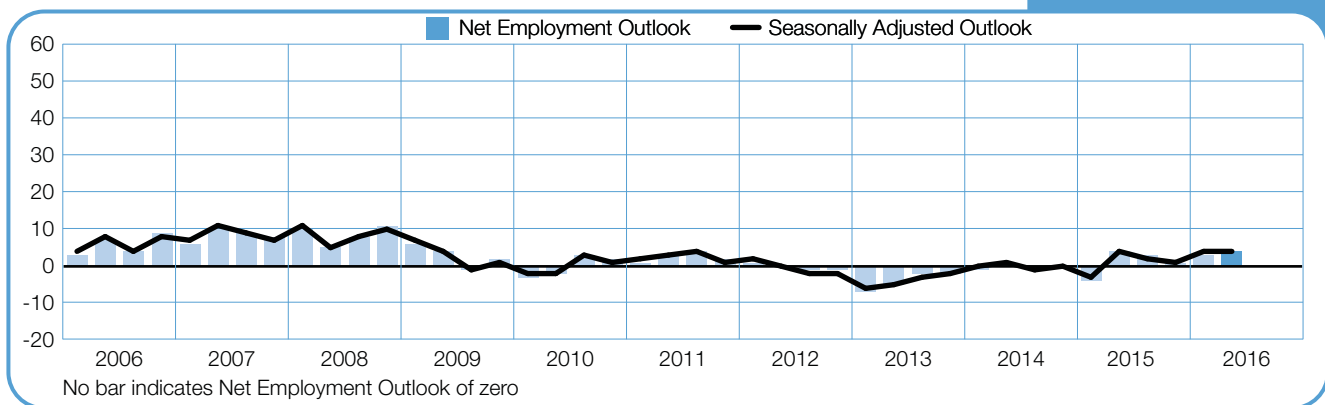
Italy

0 (+2)%



Netherlands

+4 (+4)%



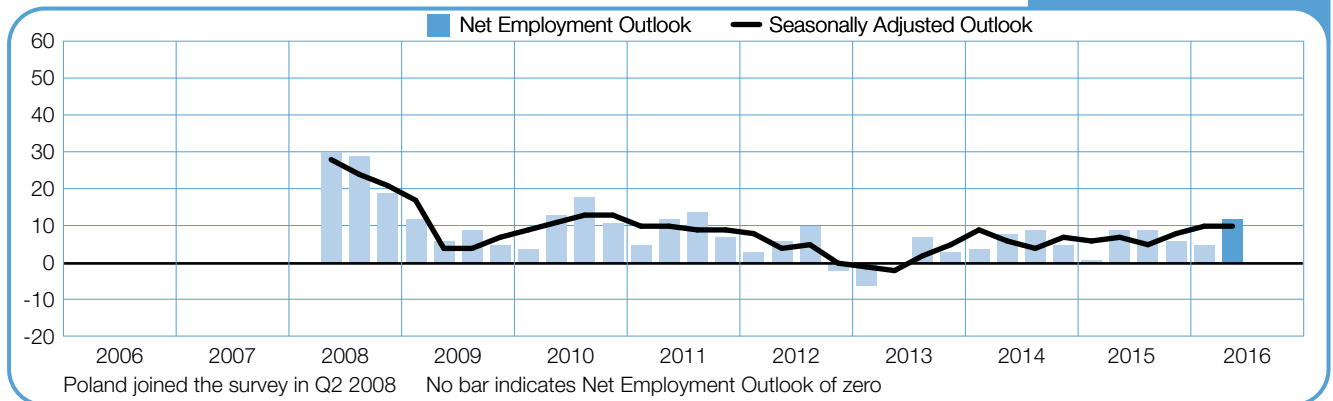
Norway

+3 (+3)%



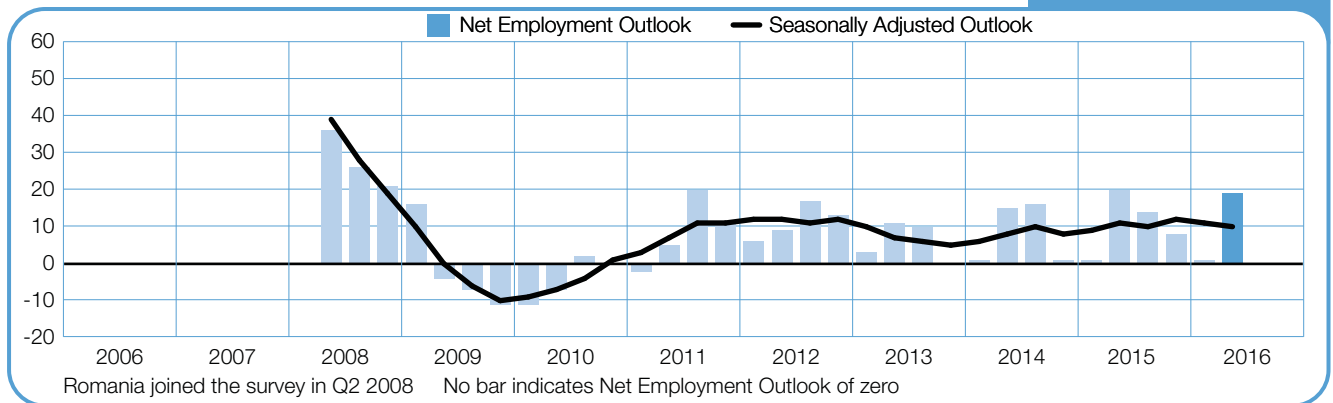
Poland

+10 (+12)%



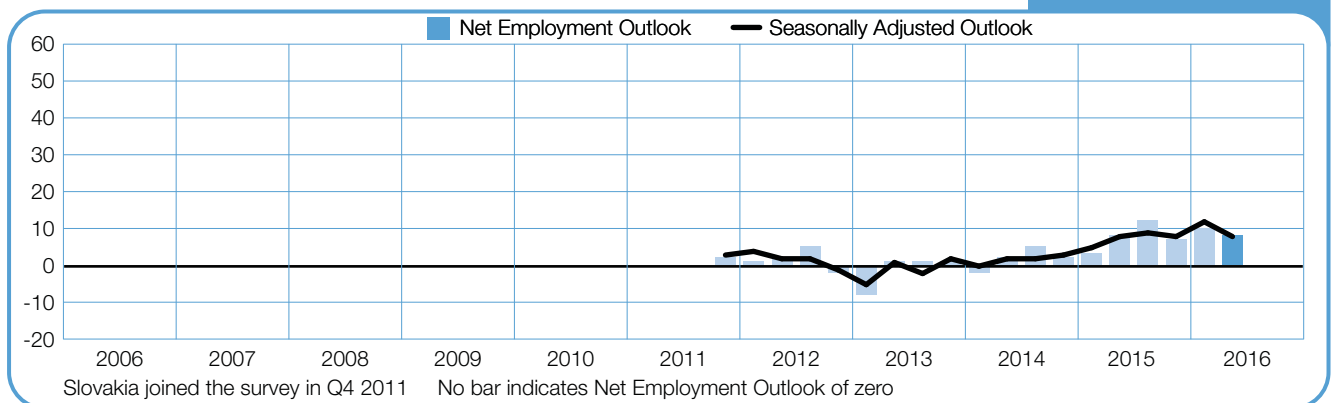
Romania

+10 (+19)%



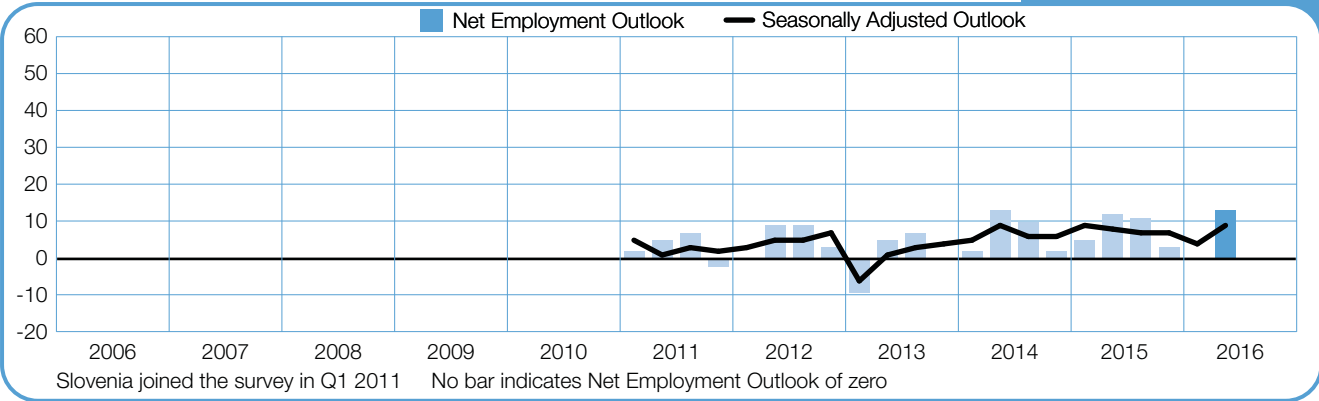
Slovakia

+8 (+8)%



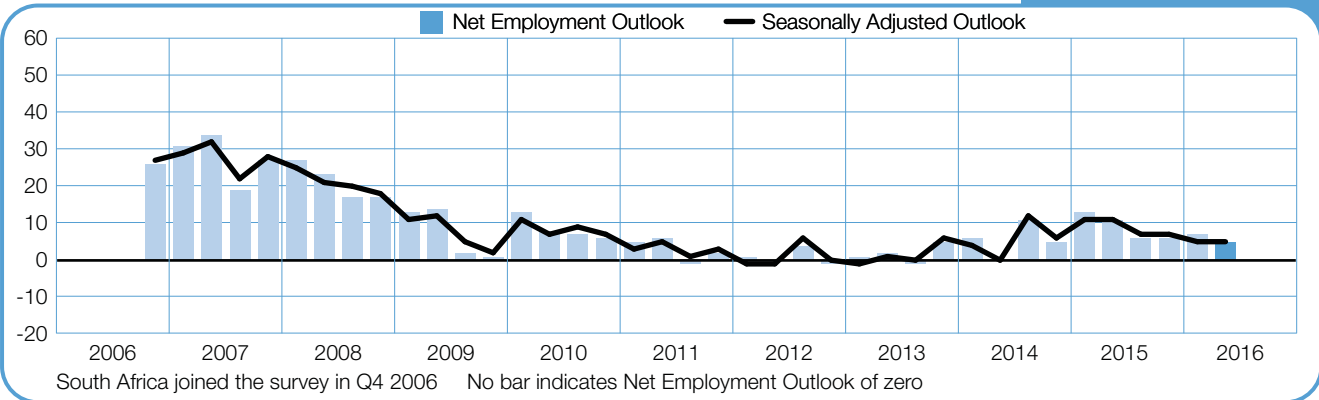
Slovenia

+9 (+13)%



South Africa

+5 (+5)%



Spain

+1 (+3)%



Sweden

+7 (+9)%



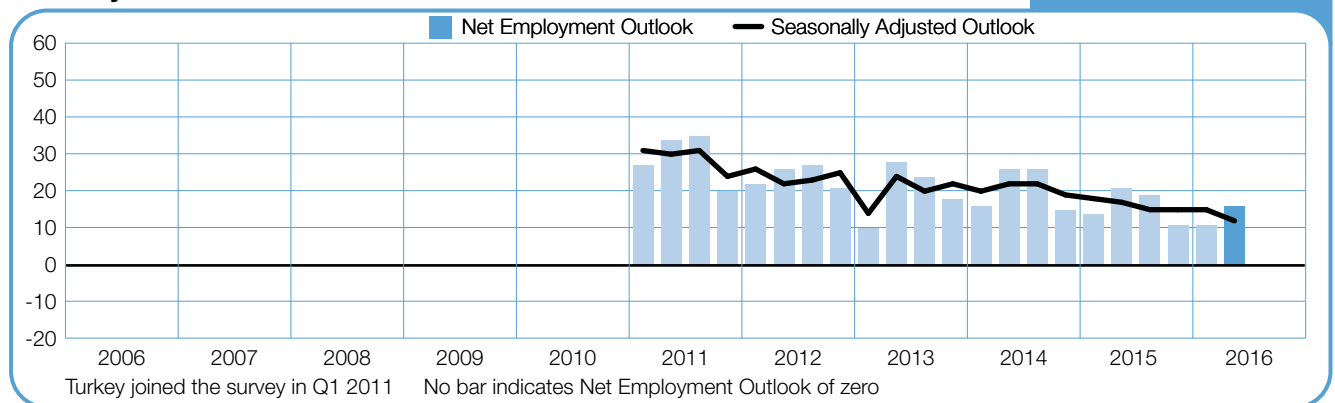
Switzerland

+1 (+3)%



Turkey

+12 (+16)%



United Kingdom

+7 (+7)%



About the Survey

The Manpower Employment Outlook Survey is conducted quarterly to measure employers' intentions to increase or decrease the number of employees in their workforces during the next quarter. ManpowerGroup's comprehensive forecast of employer hiring plans has been running for more than 50 years and is one of the most trusted surveys of employment activity in the world. Various factors underpin the success of the Manpower Employment Outlook Survey:

Unique: It is unparalleled in its size, scope, longevity and area of focus.

Projective: The Manpower Employment Outlook Survey is the most extensive, forward-looking employment survey in the world, asking employers to forecast employment over the next quarter. In contrast, other surveys and studies focus on retrospective data to report on what occurred in the past.

Independent: The survey is conducted with a representative sample of employers from throughout the countries and territories in which it is conducted. The survey participants are not derived from ManpowerGroup's customer base.

Robust: The survey is based on interviews with over 58,000 public and private employers across 42 countries and territories to measure anticipated employment trends each quarter. This sample allows for analysis to be performed across specific sectors and regions to provide more detailed information.

Focused: For more than five decades the survey has derived all of its information from a single question: For the 2Q 2016 research, all employers participating in the survey worldwide are asked the same question, "How do you anticipate total employment at your location to change in the three months to the end of June 2016 as compared to the current quarter?"

Methodology

The Manpower Employment Outlook Survey is conducted using a validated methodology, in accordance with the highest standards in market research. The survey has been structured to be representative of each national economy. The margin of error for all national, regional and global data is not greater than +/- 3.9%.

Net Employment Outlook

Throughout this report, we use the term "Net Employment Outlook." This figure is derived by taking the percentage of employers anticipating an increase in hiring activity and subtracting from this the percentage of employers expecting to see a decrease in employment at their location in the next quarter. The result of this calculation is the Net Employment Outlook. Net Employment Outlooks for countries and territories that have accumulated at least 17 quarters of data are reported in a seasonally adjusted format unless otherwise stated.

Seasonal adjustments have been applied to the data for all participating countries except Finland. ManpowerGroup intends to add seasonal adjustments to the data for other countries in the future, as more historical data is compiled. Note that in Quarter 2 2008, ManpowerGroup adopted the TRAMO-SEATS method of seasonal adjustment for data.

About ManpowerGroup™

ManpowerGroup™ (NYSE: MAN) has been the world's workforce expert, creating innovative workforce solutions for nearly 70 years. As workforce experts, we connect more than 600,000 people to meaningful work across a wide range of skills and industries every day. Through our ManpowerGroup family of brands—Manpower®, Experis™, Right Management® and ManpowerGroup™ Solutions—we help more than 400,000 clients in 80 countries and territories address their critical talent needs, providing comprehensive solutions to resource, manage and develop talent. In 2016, ManpowerGroup was named one of the World's Most Ethical Companies for the sixth consecutive year and one of Fortune's Most Admired Companies, confirming our position as the most trusted and admired brand in the industry. See how ManpowerGroup makes powering the world of work humanly possible: www.manpowergroup.com.

ManpowerGroup Czech Republic, Karlovo náměstí 10/2097, 120 00 Prague 2, Czech republic
Tel.: +420 296 370 728 Fax: +420 296 370 727
www.manpower.cz

©2016, ManpowerGroup spol. s r.o. All rights reserved.