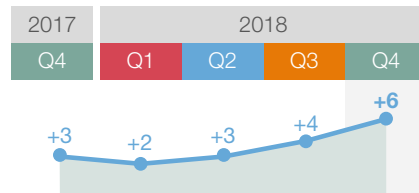


STRONGEST HIRING PLANS FOR ALMOST TWO YEARS IN BELGIUM

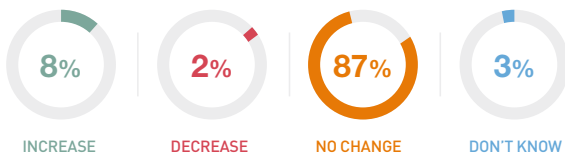
NET EMPLOYMENT OUTLOOK



+6 Net Employment Outlook Belgium Q4 2018

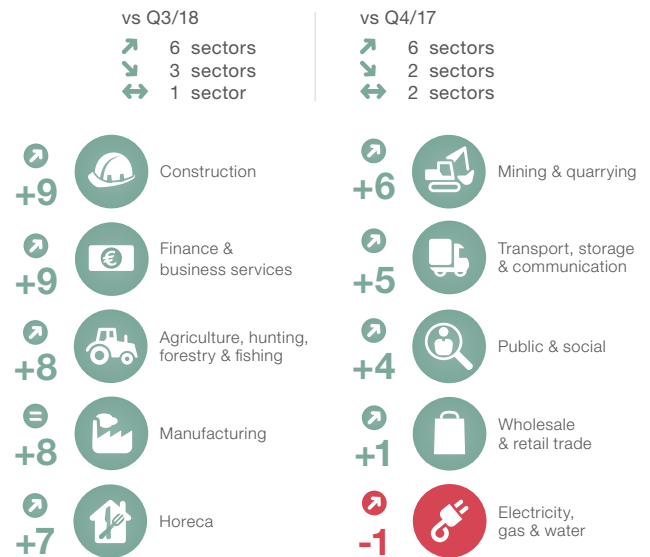
Q4 2018

750 BELGIAN EMPLOYERS WERE ASKED: "How do you anticipate total employment at your location to change in the three months to the end of December 2018, as compared to the current quarter?"



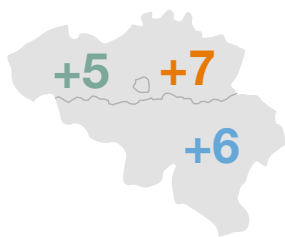
Q4 2018

POSITIVE OUTLOOKS IN 9 OF THE 10 INDUSTRY SECTORS



Q4 2018

OPTIMISM IN THE THREE REGIONS



+5 Flanders
 ↗ 1 point vs Q3/18
 ↗ 4 points vs Q4/17

+7 Brussels
 ↗ 2 points vs Q3/18
 ↗ 2 points vs Q4/17

+6 Wallonia
 ↗ 4 points vs Q3/18
 ↗ 2 points vs Q4/17

Q4 2018

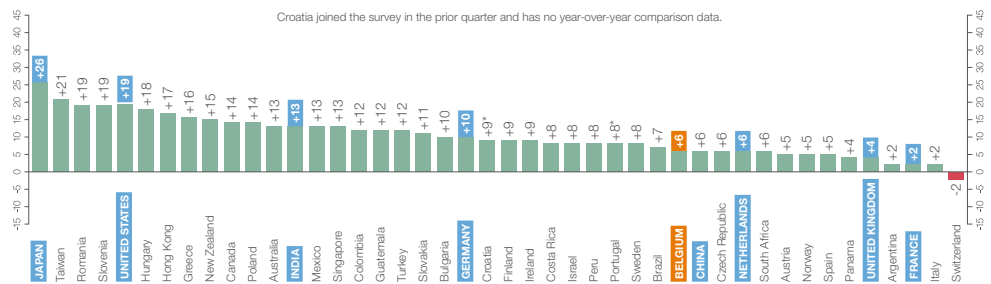
HIRING FORESEEN IN LARGE AND MEDIUM-SIZED BUSINESSES



Q4 2018

POSITIVE HIRING INTENTIONS IN 43 OF 44 COUNTRIES AND TERRITORIES SURVEYED

vs Q3/18	vs Q4/17
↗ 24 countries	↗ 23 countries
↘ 14 countries	↘ 13 countries
↔ 8 countries	↔ 7 countries



44 countries / 59.000 employers

Q4 2018

WHAT DO THESE FIGURES MEAN?

% employers anticipating total employment to increase
 - % employers anticipating total employment to decrease
 = Net Employment Outlook (can be positive or negative)

Q4 2018

The ManpowerGroup Employment Outlook Survey is the most extensive, forward-looking employment survey in the world.

Q4 2018

KEYFACTS

BELGIAN EMPLOYERS PLAN TO HIRE IN THE FOURTH QUARTER ... BUT WILL THEY FIND THE CANDIDATES?

- +6** Belgian Net Employment Outlook improves by 2 percentage points when compared with the previous quarter and stands at an **encouraging +6**, the strongest forecast since Quarter 1 2017.
- 3** Outlooks are **optimistic in all three regions**: +7 in Brussels, +6 in Wallonia, +5 in Flanders.
- 9** Job gains are anticipated in **9 of the 10 industry sectors** during 4Q 2018, with the strongest labor markets forecast for the Construction sector (+9), the Finance, Insurance, Real Estate & Business Services sector (+9) and in the Manufacturing sector (+8).
- +25** Large and Medium-size employers report healthy hiring intentions with Net Employment Outlooks of **+25 and +24**, respectively
- 43** Payroll gains are anticipated in **43 of 44 countries surveyed**; only employers in Switzerland report slightly negative hiring intentions (-2)

Q4 2018



“ Belgian employers plan to continue **strengthening their workforce during the fourth quarter**. This positive trend holds true in all three regions of the country and in virtually every industry. However, **the challenge will be to find the right candidates**, since **more than one in three Belgian employers are affected by the talent shortage***. The question will be whether the 28 measures that make up the ‘jobs deal’ put in place by the federal government, together with the action taken in each region, will be enough to **reduce the gap** between supply and demand in the labor market. Nevertheless, realistically, **we can expect the talent war to intensify within many trades**. Within our field we are well-placed to see how the situation is evolving and we see that candidates are receiving more job offers than before, so **employers are under pressure to improve their appeal and speed up their decision-making process**. ”

Philippe Lacroix Managing Director ManpowerGroup

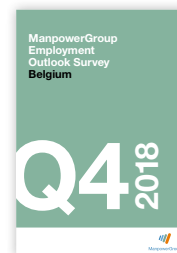
*ManpowerGroup Talent Shortage Survey 2018

Q4 2018

BELGIQUE - EVOLUTION OF STAFFING LEVELS

	Increase	Decrease	No change	Don't know	Net Employment Outlook	Seasonally adjusted
	%	%	%	%	%	%
Oct-Dec 2018	8	2	87	3	6	6
July-Sept 2018	6	2	91	1	4	4
April-June 2018	7	3	87	3	4	4
Jan-Mar 2017	8	6	83	3	2	2
Oct-Dec 2017	5	2	93	0	3	3

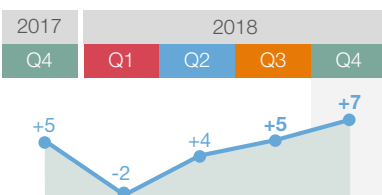
Q4 2018



CHECK THE SURVEY ONLINE



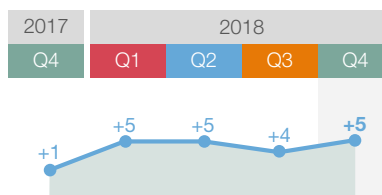
BRUSSELS



↗ The **strongest labor market** is anticipated in **Brussels**, with a **Net Employment Outlook of (+7)**, improving by 2 percentage points both quarter-over-quarter and year-over-year.

Q4 2018

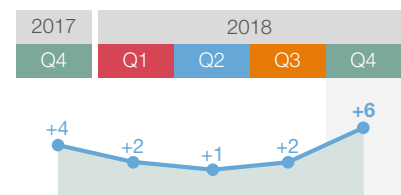
FLANDERS



↗ Employers confidence remain **relatively stable in Flanders (+5)**, increasing by 1 percentage point in comparison with the previous quarter.

Q4 2018

WALLONIA



↗ Employers in Wallonia are **optimistic** too, reporting their **strongest hiring intentions (+6) since Q2 2016**.

Q4 2018

More info: manpowergroup.be

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