

Nearly 9,400 people worked at least one hour in a temporary position in 2020 (including all assignment lengths). The health crisis resulted in a 17.5% reduction in the temporary workforce and a 25.4% decline in the number of assignments, compared with 2019. Although temporary work was hard hit by the situation in spring 2020, the sector rapidly recovered from the second quarter onwards.

More than 17% reduction in temporary workforce between 2019 and 2020

In 2020, a total of 9,368 temporary workers (placed by an agency of Monaco) who were registered with the Monaco Social Security Funds worked at least one hour in a temporary position during the course of the year. This represents a 17.5% reduction in the temporary workforce compared with 2019. Nearly 6 million hours were worked in temporary positions across the period as a whole, a decline of 14.9% compared with the previous year.

While more than 4,000 temporary workers were recorded at the beginning of 2020 (a slight increase compared with 2019), the initial impact of the COVID-19 pandemic emerged in March with a substantial fall in the number of temporary workers, followed by a precipitous decline in April. At the height of the crisis, the temporary workforce was around 1,100 strong (-73% compared with the previous year). The sector then recovered over the remainder of the second quarter. From July, the number of workers returned to and even surpassed 2019 levels. At the end of 2020, the temporary workforce stood at more than 3,800, up 10% compared with the end of 2019.

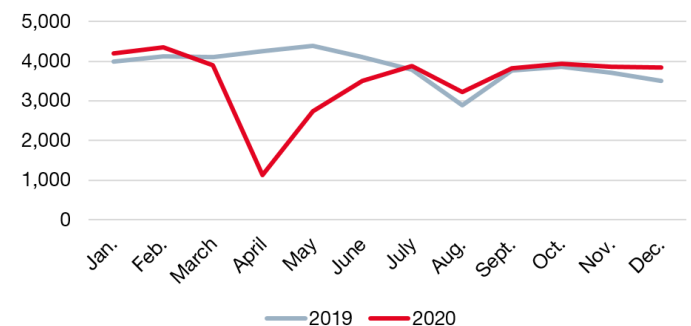
The impact of the health crisis during 2020 was also seen in the number of hours worked in temporary employment. Total monthly hours fell from March to reach a low point in April, when, among other things, temporary workers were excluded from construction sites, before rising again to reach levels higher than those in 2019 during the second half of the year (with the exception of October).

1. Number of temporary workers and hours worked in 2020 and variation

	2020	Variation 2019-2020
Temporary workers	9,368	-17.5%
Hours worked (in million)	5.8	-14.9%

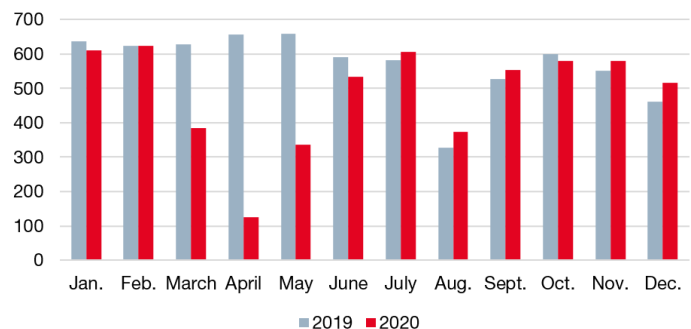
Sources: Temporary work agencies, Monaco Statistics

2. Monthly change in the number of temporary workers in 2019 and 2020



Sources: Temporary work agencies, Monaco Statistics

3. Monthly change in the number of hours worked in temporary work in 2019 and 2020

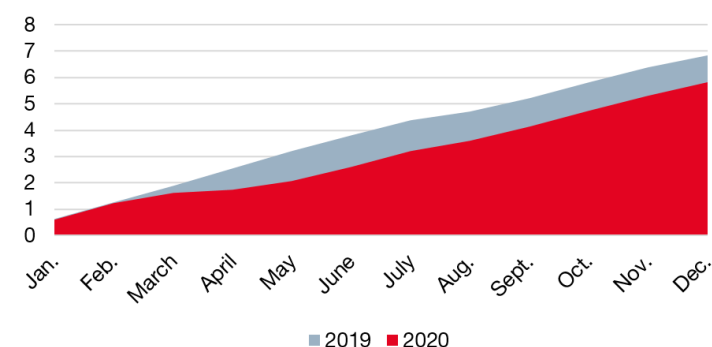


Unit: thousand hours

Sources: Temporary work agencies, Monaco Statistics

1 million fewer hours worked in temporary employment in 2020 compared with 2019

4. Monthly evolution of the cumulative number of hours worked in temporary work in 2019 and 2020



Unit: million hours

Sources: Temporary work agencies, Monaco Statistics

Although the figures for temporary work recovered during the second half of the year, this was not sufficient to compensate for the abrupt fall in activity between March and May 2020. From spring 2020, the total number of hours worked lagged behind the figure for the same period in 2019, and this was not made up over the rest of the year, resulting in a gap of around 1 million working hours between the two years. By the end of 2020, a total of 5.8 million hours had been worked in temporary positions over the course of the year, compared with 6.8 million in 2019.

At the individual level, the average number of hours worked by a temporary worker in 2020 was 621 (600 in 2019).

Construction sector continues to supply the most assignments

5. Number of temporary assignments and number of temporary workers in 2020 and variation

	2020	Variation 2019-2020
Number of assignments	32,697	-25.4%
Number of temporary workers	9,368	-17.5%
Average number of assignments per temporary worker	3.5	-9.5%

Sources: Temporary work agencies, Monaco Statistics

6. Breakdown of the number of assignments by major economic sector of the user company in 2020

	Share of assignments
Construction	50.0%
Retail trade	21.2%
Scientific and technical activities, administrative and support service activities	8.7%
Manufacturing, mining and quarrying, and others industries	8.1%
Public administration, education, human health and social work activities	2.8%
Transportation and storage	1.8%
Wholesale trade	1.5%
Real Estate activities	1.4%
Accommodation and food service activities	1.4%
Other service activities	1.3%
Financial and insurance activities	1.3%
Information and communication	0.4%
TOTAL	100%

Sources: Temporary work agencies, Monaco Statistics

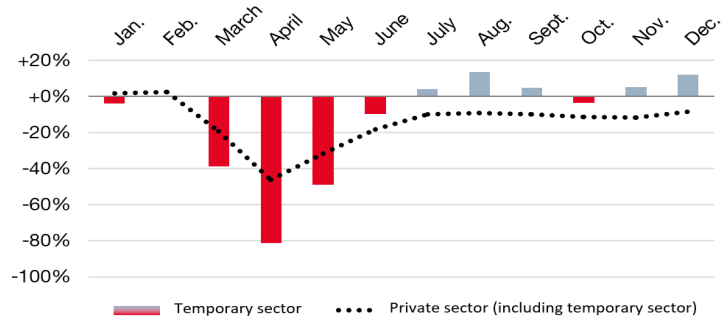
Over the 12 months of 2020, more than 32,000 temporary assignments were completed, around a quarter fewer than in the previous year. This works out to an average of 3.5 assignments per temporary worker (compared with 3.9 in 2019).

Despite the brief exclusion of temporary workers from construction and public works sites in April, the construction sector continued to use more temporary workers than any other, accounting for half of all assignments during the year. The share of temporary assignments carried out in the retail trade sector increased in 2020, with some businesses able to continue operating without interruption, unlike in other sectors. The manufacturing, mining and quarrying and other industries major economic sector (MES), which diversified its production activities in response to the health crisis, also generated a greater proportion of temporary assignments than in 2019. Conversely, the accommodation and food service activities sector, which was the second largest source of temporary work in 2019 (accounting for around one in five assignments) was hard hit by the health crisis in 2020 and therefore generated fewer assignments during this period.

Temporary sector more reactive than private-sector employment overall in 2020

While temporary employment was more heavily impacted by the crisis in spring 2020 than the private sector as a whole, it nonetheless recovered more quickly. The closure of businesses due to lockdown and the delayed and gradual return of temporary workers to construction sites exacerbated the loss of working hours by temporary staff during this period. Subsequently, the recovery observed from July onwards was considerably more marked in the temporary sector than across private-sector employment as a whole. In five months of the second half of the year, more hours were worked in temporary employment in 2020 than in 2019.

7. 2019-2020 monthly variation in the number of hours worked in temporary employment and in the private sector



Sources: Temporary work agencies, Social Services Compensation Fund, Monaco Statistics

Interpretation: the number of hours worked in temporary employment in April 2020 was down 81% compared with April 2019; across the private sector as a whole (including temporary employment), hours worked were down 46% in April 2020 compared with the same month in the previous year.

- In 2020, the temporary sector continued to be overwhelmingly male dominated, with men accounting for 78.8% of temporary workers (77.1% in 2019).
- The temporary workforce aged slightly: the mean age was 38.6 years in 2020 compared with 37.9 years in 2019. Women are still younger than their male peers, on average, at 36.6 years compared with 39.1 years.
- The proportion of workers who live in Italy rose very slightly (13.2% in 2020, 0.6 percentage points higher than in 2019) while that of Monaco residents fell by the same amount (3.2%, a decline of 0.6 percentage points). The proportion of workers living in France remained stable and predominant (83.6%).
- Half of temporary workers were French nationals in 2020. This nonetheless represented a slight decline (-3.2 percentage points) compared with the previous year, while at the same time, the proportion of Italian nationals increased slightly (16.3%, up 0.9 percentage points).

Sources: the data presented in this Focus was collected by Monaco Statistics from 14 (of 15) temporary employment agencies in the Principality on 31/12/2020. Comparisons with the previous year were carried out at constant scope, noting that the lack of a response from one actor had no impact on the overall analysis for 2020.

Temporary worker population: all temporary workers employed through a Monegasque temporary employment agency who have a Monaco Social Security Funds registration number and completed at least one hour of work in 2020 have been included.

Assignments: all assignments carried out by temporary employees in 2020 have been included, regardless of the number of hours worked.

