# Geographies of Temporary Staffing Unit

## Working Paper 3

**Making 'Flexible' Manchester: Competition and Change in the Temporary Staffing Industry**

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## Abstract

According to local economic and political commentators, Manchester's economy is booming. Employment is growing, investment is on the up, people are moving back into the city centre, and last summer the city hosted the largest multi-sporting event to be held in England since the 1948 Olympics. Local economic and political actors point to the wave of economic optimism that has followed the 'entrepreneurial turn' performed in the late 1980s by the city's political institutions. As part of this, emphasis switched away from Manchester's industrial past and to its post-industrial futures. The city council stopped talking defensively and began to talk about making things happen. Political strategies focused on raising the profile of the city, through sustained marketing strategies aimed at selling Manchester as a flexible, twenty-first century consumer-orientated city. Important in guaranteeing the emergence of this new type of 'flexible city' has been the emergence of new-style labour market institutions and their involvement in the delivery of 'on-the-ground' flexibility. Integral to this new regulatory regime has been the emergence in Manchester of a sizeable temporary staffing industry. The first English city to regulate the initial incarnation of temporary staffing agencies, employment bureaux, and hence with a long established 'industry' as such, this paper exams the newly energised Manchester temporary staffing industry, and traces some of the labour market and organisational implications of the industry's rapid growth in Manchester in the last thirty years.

**Keywords:** entrepreneurial urbanism, state restructuring, temporary staffing industry, labour markets, flexibility, Manchester

# 1. Introduction

According to a recent report by the Department of Trade and Industry, 'the employment agency industry is a new and very dynamic sector in the British economy' (Hotopp, 2001: 8). By the end of last year the UK temporary staffing industry was worth £21 billion, and revenues had more than doubled in the proceeding five years. It is now the largest temporary staffing industry in Europe and the second largest in the world, behind the home of temporary staffing, the US. The UK temporary staffing industry now consists of almost twelve thousand agencies, an increase of over 50% from 1996. More qualitatively, its business is no longer restricted to the clerical and light-industrial segments, its traditionally strong markets (Ward, 2003). In the last decade temporary staffing agencies have sought to expand out of their traditional markets – with varying degrees of success – as part of a wider attempt by the global industry to re-brand its product (Peck and Theodore, 2002; Ward, 2001). So, placements in sectors such as healthcare, local government, and IT and in managerial occupations have increased, as temporary staffing agencies have looked to go 'up market'.

Of course, the temporary staffing industry, as it is known in the US, has existed for a number of years in the UK. There is evidence that temporary staffing agencies were performing their business in the UK as long ago as the 1950s and 1960s (The Economist, 1962: 705-706; Moore, 1965). And yet their presence in British cities seems now somehow more pronounced. Anyone who has walked around the centre of an English city over the last decade or so cannot fail to have noticed how, on some streets, almost every other shop is a temporary staffing agency. Each city has its own 'temp row': in Birmingham it's New Street, and B1 more widely, while in Manchester its Cross Street, and the area of M1 postcodes more generally. Sitting squarely in the centre of English cities, temporary staffing agencies are important symbols of the 'new', more flexible economies of these cities. They are clear markers to those who walk around a city that it matters, that it is connected into wider global economic networks that stretch to the US, to mainland Europe and to the Far East. As the large multinationals, the Manpowers of this world, rub shoulders with the smaller, local independents, so an image is conjured up of a city that can deliver 'on the ground labour market flexibility', and so compete with other cities successfully. As constitutive parts in

a wider entrepreneurial regulatory regime, that structures the 'doing'/talking about economic and social policy (such as economic development, urban planning, welfare reform and so on), temporary staffing agencies appear to be integral to the successful performance of an increasing number of UK local economies.

Nowhere in the UK does a city's temporary staffing industry have more of a real and symbolic impact than in Manchester. In 1903 the Manchester Corporation became the first English city to regulate its employment bureaux. In the proceeding one hundred years the bureau of then has become the temporary staffing agency of today: mediating work and placing workers. And Manchester is the most 'temped out' city in the UK. It has more temporary staffing agencies per head of working population that any other UK city. These labour market intermediaries (who through their very existence actively shape the demand for their services) are an important component of the entrepreneurial regulatory regime that has overseen (and delivered) the city's (self)-proclaimed 'urban renaissance' (Peck and Ward, 2002). In light of this, albeit self-positioned place as entrepreneurial city *par excellence*, and the size of the city's temporary staffing industry, Manchester provides an appropriate site on which to explore the ways in which some of the more systemic changes in the UK temporary staffing industry play out in a particular place. Moreover, the research findings presented here should be of note to those who are interested in the industry's business model in its more mature markets (Peck and Theodore, 2002; Ward 2001, 2003).

In light of these concerns this paper does three things. First, it explores the role of temporary staffing agencies in delivering 'flexible' labour markets as part of the wider entrepreneurial shift in urban economic development. Second, the paper draws upon forty semi-structured interviews with agency owners and managers, industry trade bodies, government representatives, labour unions and so on, to examine some of the characteristics of Manchester's temporary staffing industry.[1] It argues that despite the

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[1] Semi-structured interviews were arranged with the owners/managers of agencies in a wide-range of sectors, from healthcare to call centres, from legal to transport. All interviews were organised around a range of themes, lasted approximately an hour and were fully transcribed. The rationale for using this method to generate information was twofold: (i) first, that the research was trying to get at the dynamic process of temping: issues of competition, worker placement, changing relationships with client firms/workers etc and that semi-structured interviews are an appropriate means of achieving this and (ii) second, existing quantitative data, measures the size and structure of the national industry but is unable to explain much of what it reports (see Hotopp 2001).

claims of the largest agencies, the industry's characteristics are at least in part defined by the business done by agencies at the lower-end of the market. There is also evidence of both a tendency towards divergence *and* convergence amongst the different segments of the temporary staffing industry. Despite the increasing number of industrial sectors serviced by agencies as part of the largest agencies' diversification strategies there still remain some industry-wide traits. Third, it concludes by arguing that the rapid growth in temporary staffing agencies across English cities reflects the emergence and institutionalising of an entrepreneurial regulatory regime, which delivers flexibility at both the top end and the lower end of the labour market, with quite different consequences for the occupants in each.

## 2. Entrepreneurial urbanism, 'Flexible' labour markets and economic development

It is not to exaggerate to claim that the last three decades has seen many of the central pillars of the (national) Fordist mode of regulation be dismantled and in its place emerge a range of new structures and practices of (local) governance (Goodwin and Painter, 1996; Jessop, 1992, 1994; Imrie and Raco, 1999; Ward, 2000a). While it is far from clear that what is now in place amounts to anything that can either 'resolve the crisis tendencies of the Fordist mode of regulation … [and] … enable and promote sustained capital accumulation' (Painter and Goodwin, 2000: 37), nevertheless, it is possible to identify a number of changes in the way the local state regulates labour markets in the name of enhancing economic development.

One such departure from the Fordist mode of regulation is the way the national (and local) state regulates the relationship between employers and workers in the name of achieving economic growth. For Jessop (1994) the wage relation in the aftermath of Fordism would have the following characteristics: (i) polarisation between skilled and unskilled workers; (ii) flexibility in internal and external labour markets; (iii) firm or plant-level bargaining; and (iv) new forms of social wage. In each of these cases, for a new mode of regulation to emerge means a series of changes in what and who is involved in the performance of local economic and social governance. Moreover, as these changes occur in the processes of local

governance, so there are consequences for the mode of regulation.  The two are then interpreted as mutually reinforcing (or undermining) of each other.

In light of this relationship between the mode of regulation and the performances of local governance it is possible to consider in more detail the emergence in recent years of entrepreneurial urbanism (Jessop, 1997, 1998) and the changes associated with the discursive and strategic privileging of the 'flexible' economy as places bargain 'away … regulatory controls' in the name of competitiveness (Peck and Tickell, 1994: 281).  For as Goodwin and Painter (1996: 644) argue:

> what is especially significant is the extent to which  … disparate (and sometimes initially unrelated) changes interact with each other in mutually reinforcing ways. This is something that can be revealed only on the basis of intensive qualitative and causal analysis in specific cases, since it involves examining the actual operation of potential regulatory processes in the ways they interact with others.

What is relevant here is how changes in three different sites of regulation – 'local labour markets', 'labour relations' and 'economic goals' – interact, creating regulatory space for the emergence of non-state interests, such as those represented by the temporary staffing industry, an emergence that then plays a role in the practicing of local economic development.

It is generally accepted that actors and agencies charged with the economic, social and political governance of North American and Western European cities have since the late 1980s begun to pursue economic development goals using entrepreneurial narratives and performing entrepreneurial practices (Jessop, 1997, 1998).  As part of this political realignment the ways in which urban labour markets are constructed and talked about has undergone significant change.  City marketing in the current political-economic context has meant that urban labour markets have become represented as 'dynamic' and as 'flexible'.  It is a 'local' labour market, comprised of an over-supply of low-waged and of high-skilled workers, in order that wages can be suppressed, all of whom are prepared to work as and when required, that those overseeing economic development agendas seek to construct.  In the same way that in representations of different local economies service sector activity (for which often 'new economy') tend to

be over-represented at the expense of manufacturing industries (for which read 'old economy'), so new ways of organising the labour market tend to be over-represented at the expense of more-traditional methods. New-style employment relations are talked-up. And in order to substantiate these discursive claims economic development actors and agencies need the delivery of 'on the ground' labour market flexibility. This is where temporary staffing agencies come in. The industry's very raison d' être is the de-coupling of the firm from worker (Ricca, 1982). As Gonos (1997: 86) argues about the growth of temporary staffing in the US:

> In allowing core firms throughout the economy to rid themselves of legal obligations with respect to a proportion of the workforce, the temporary [staffing] formula [has become] a key mechanism for the dramatic restructuring of employment relations in the 1970s.

The presence of temporary staffing agencies in a particular urban labour market is what firms look for, alongside a co-operative local authority who can make things happen and a raft of government grants, when deciding where to locate. And in doing their own business in placing labour and mediating work agencies re-shape wider employment relations: their labour market influence is not restricted to the workers they place. As Peck and Theodore (2002: 156) argue about the US:

> [T]he significance of the temp industry … relates to that much wider field of employment relations where temping is a viable option and where it therefore exerts an influence over the strategic choices and constraints of employers and workers.

Before we turn to explore how the 'wider field' of employment relations in Manchester might have been re-shaped through the policies and practices of temporary staffing agencies, this paper turns next to consider the growth in the UK industry and the extent of its presence in the UK's urban labour markets.

## 3. Growth and restructuring in urban temporary staffing industries

In the financial year 1996-97 the turnover of the UK temporary staffing industry was £9.9 million: for the financial year 2001-02 it was £22.6 million (Recruitment and Employment Confederation, 2002). This increase of 129% in five years is mirrored by the growth in the number of temporary staffing agencies that make up the UK temporary staffing industry. Between 1992 and 2002 the number of what the Recruitment and Employment Confederation (REC) refer to as 'recruitment consultancies' increased from 8,342 to 11, 173, a 34% increase (Recruitment and Employment Confederation, 2002).

Not surprisingly, behind the growth in industry revenues has been an increase in the number of workers placed through agencies. Although there is no agreement on how many workers are placed each week, evidence suggests it is somewhere between six hundred thousand and a million (Hotopp, 2001; Recruitment and Employment Confederation, 2002). The proportion of the workforce working through a temporary staffing agency at any one time remains small in the UK – around 3 or 4% (Department of Trade and Industry, 1999; Recruitment and Employment Confederation, 2001). However, in terms of the non-standard workforce, such as part-time, fixed-term, casual workers etc, temporary staffing is a rapidly growing way of gaining employment. Moreover, US evidence has revealed how official labour market measures are unable to cope with the fast-moving realities of the temp business Houseman, 1998)

As part of the expansion of the UK temporary staffing industry analysts point to the role of cities as important sites for this growth. For example, in one of their industry reports Key Note (2001: 12) argue that 'much of [the growth] is focused around the large towns and cities.' Table 1 sets out how the number of temporary staffing agencies has been growing in England's urban labour markets since the early 1970s. Although figures differ from one city to the other, the general trend is upwards: temporary staffing agencies have been increasing the amount of business they do in England's largest labour markets (Ward 2003a, 2003b). The growth is particularly pronounced since 1991, during which time English cities underwent widespread economic and political restructuring, often the sites for neo-liberal state initiatives in response to the 'urban crisis' of the 1970s and 1980s. This urban-based growth mirrors the expansionary

trajectory in the US. As Peck and Theodore (2002: 170) argue 'high urban labor-market penetration rates have indeed been a feature of this more recent phase of the [US] TSI's development.'

In each of the six urban labour markets, the growth in the number of temporary staffing agencies between 1971 and 2001 is impressive. Thirty years ago each city had a temporary staffing industry of note, reflecting both the early presence of the large multi-nationals (Ward, 2003b), and the emergence of local independents. Since then growth rates range from 86% in Liverpool to 715% in Bristol, with all but Liverpool experiencing growth over the thirty years of over 280%.

**Table 1: Growth in urban England of temporary staffing agencies, 1971-2001**

|  | 1971 | 1981 | 1991 | 2001 | % Change, 1971-2001 |
|---|---|---|---|---|---|
| Birmingham | 60 | 69 | 138 | 293 | 388 |
| Bristol | 26 | 49 | 108 | 212 | 715 |
| Leeds | 35 | 49 | 111 | 225 | 542 |
| Liverpool | 29 | 32 | 42 | 54 | 86 |
| Manchester | 65 | 89 | 168 | 252 | 287 |
| Newcastle | 18 | 31 | 78 | 75 | 316 |
| Total | 233 | 319 | 645 | 1111 | 385 |

Source: *British Telecom Yellow Pages* across all cities, 1971, 1981, 1991, 2001

Table 2 explores the number of temporary staffing agencies per head of working population in each of the six cities. In the absence of reliable urban data on the number of people placed through temporary staffing agencies, this indicator acts to suggest which of the six cities is the most 'temped out'. For Manchester there are 698 workers per temporary staffing agency, making it the most temped out of the six cities. At the other end of the spectrum, in Liverpool there are 3519 workers per temporary staffing agency.

**Table 2: Temped out English cities**

|  | Number of temporary staffing agencies (2001) | Working population | Working population per temporary staffing agency |
|---|---|---|---|
| Birmingham | 293 | 442 000 | 1509 |
| Bristol | 212 | 214 000 | 1009 |
| Leeds | 225 | 390 000 | 1733 |
| Liverpool | 54 | 190 000 | 3519 |
| Manchester | 252 | 176 000 | 698 |
| Newcastle | 75 | 125 000 | 1667 |

Source: *British Telecom Yellow Pages* across all cities, 2001; Labour Force Survey (2001) available at:

http://www.statistics.gov.uk/themes/labour_market/

Although only a proxy for a truer measure of how temporary staffing agencies have got inside and effected the way each of the labour markets are organised, segmented, work, nevertheless, the measure acts to highlight the relative differences between each city's temporary staffing industry. In light of this finding, that Manchester at least according to this indicator is the most temped out English city, the next section of this paper turns to explore the business dynamics and competitive strategies of agencies in the city.

## 4. Competition and change in Manchester's temporary staffing industry

In recent years the performance of its city council, chamber of commerce and the range of city and regional institutions involved in its economic development has led some to point to Manchester as entrepreneurial urbanism personified (Peck and Tickell, 1995; Peck and Ward, 2002; Quilley, 1998, 1999; Tickell and Peck, 1996). Embodying the very essence of inter-urban competition, Manchester's economic and political elite has made a name for itself (and the city). It has embraced the 'opportunities' presented to it through the redrawing of state-market boundaries and the changes made to the logic of urban policy.

Working in partnership with representatives of the local business sector, Manchester City Council (MCC) successfully repositioned itself at the end of the 1980s. From talking about state socialism it turned to practicing entrepreneurial urbanism, bidding for and winning a succession of national and EU grants to redevelop areas around the outskirts and in the centre of the city. Throughout the 1990s Manchester's political and economic leaders worked with each other to turn the city around. From failing, industrial city with a tatty, run-down built environment, Manchester successfully renovated large numbers of its buildings. Old canal-sides were turned into bars and into cafés and empty warehouses into flats as gentrification took hold.

To some this 'transformation' marks a rising of the 'phoenix from the ashes', an example of a city made-good, now able to embrace its post-industrial future with a renewed confidence. As Glancey (2001: 7) has argued when writing in *The Guardian*:

> Manchester, especially now it has its successful tram network, upbeat Chinatown and buzzy nightlife, does have the air, on a good day, of a confident European city.
>
> A series of profound changes in the constitution and the governance of the local economy have accompanied this remaking of the urban aesthetic (Peck and Emmerich, 1992; Giordano and Twomey, 2002). New institutions, such as the Manchester Training and Enterprise Council (TEC) and then its replacement, Manchester Enterprises, worked alongside the more established Manchester Chamber of Commerce, and the North West Business Leadership Team. The aim was as much political as it was economic. As much as arresting the haemorrhaging of employment from the city – which saw 90 000 jobs lost between 1971 and 1997 (Giordano and Twomey 2002) -- these institutions (and others) attempted to change the ways in which the local labour market worked. Their briefs were to re-make the norms and practices associated with how firms recruited staff and the ways in which workers expected to gain employment. In sum, these institutions sought locally to introduce a new type of flexible employment relationship to replace the tradition post-Second World War type that had dominated the older industrial economies, such as Manchester.
>
> All part and parcel of the successful transition to a post-industrial city, so those charged with

performing economic development in the city would say. In the context of globalisation, which is taken at face value as an extra-local reason for pursuing a particular form of economic development, Manchester's

economic agencies have set about remaking the city as a flexible economic space. For example, Greater Manchester's Knowledge Capital Partnership (2002: 2, emphasis added) – a partnership of city and regional economic agencies – has recently explained that:

> For areas like Manchester, manufacturing and mass production – the mainstays of the industrial revolution – are making way for an economy based around knowledge, new ideas, expertise and *entrepreneurialism*.

And in order to effect this 'transformation' Manchester needs both a 'highly skilled' and a 'flexible' workforce[2]:

> Manchester's greatest asset is its people. A large and highly skilled labour pool distinguishes the city from its national and international rivals (Manchestercalling.com 2002: 5).

> Increasing trends of globalisation are reflected through local economies … Several key trends reflected locally include an increasing need for *labour market flexibility* (Manchester City Council 2002a: 11, emphasis added).

This is not altogether a surprise. As Jessop (1998: 90-91) explains about the bounding and representation of the 'local economy', it is first and foremost a process of imagination:

> The basis of competitive strategies … is always and necessarily an 'imagined' economy. The constitution of an economy involves its discursive construction as a distinctive object (of analysis, regulation, governance, conquest or other practices) with definite boundaries, economic and extra-economic conditions of existence, typical economic agents and extra-economic stakeholders. The struggles to constitute specific economies as subjects, sites and stakes of competition typically involve manipulation of power and knowledge in order to establish recognition of their boundaries and geometries. The formulation of economic development strategies in this context depends on the dual distinction between: (i) the local economy and the extra-local or supra-local economic context; and (ii) the local economy and the extra-economic local environment.

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[2] Six 'drivers' are set out in the economic development plan for the Manchester City Pride area, which encompasses the local authority areas of Manchester, Salford, Tameside and Trafford. One of these drivers

As part of the entrepreneurial performance of re-imaging and freeing-up the 'local' economy there has been a re-designing of the mechanisms of urban governance. In the case of urban labour markets, temporary staffing agencies have increased their business, moving into the gaps created through the entrepreneurial policies pursued so vigorously in Manchester over the last fifteen years.

Figure 1 sets out the geographical distribution of the city's temporary staffing agencies. Over half of all Manchester's agencies are to be found in the M1 and M2 postcodes in the centre of the city. This area consists mainly of clerical and service sector generalists and specialists and a mix of international and local independent agencies. Two other areas contain a noticeably high number of agencies: the first, to the south of the city (M22) reflects the light-industrial business done by some agencies at older, 1960s industrial parks; the second, to the west of the city (M16, M17, M30) maps straight on to Trafford Park. One of the first and largest industrial parks in Europe, its recent renovation has led to a growth in business for agencies supplying workers in the distribution and logistics segment.

In each of the three areas with a high concentration of temporary staffing agencies, the geographies of contingent labour they produce are different. So, for those agencies located in the centre workers are placed across the North West of England. Managers thought nothing of taking on client firms twenty or thirty miles away. These agencies are those that rely most on Manchester's recent 'transformation' to attract workers and clients into their offices. Being in the centre of the city matters to agencies placing workers at both the top end – in the likes of accountancy or law – and the bottom end – in the likes of the city's many new call centres. To do their business these agencies need to appear to be plugged-into wider cultural, economic and social networks. Sometimes being part of this new 'scene' is believed by agency managers to compensate for working for low hourly rates in the most precarious form of employment. Those agencies located on the outskirts of the city, or on industrial parks, rely on a geographically stretched strategy to win corporate clients and assemble a database of workers. Word-of-mouth is still important – as it is accountancy – and so is visibility. It is just that client's factories are dotted around the city's various

is 'creating a world class workforce', an important development for which has been the recent formation of Manchester Temps (see later in the paper).

edge industrial parks, demanding that agencies locate near clients and for workers to move from one

agency to another means more than a walk across the street, as is the case at the city centre agencies.

In light of this overview of Manchester's temporary staffing industry, the paper now turns to the

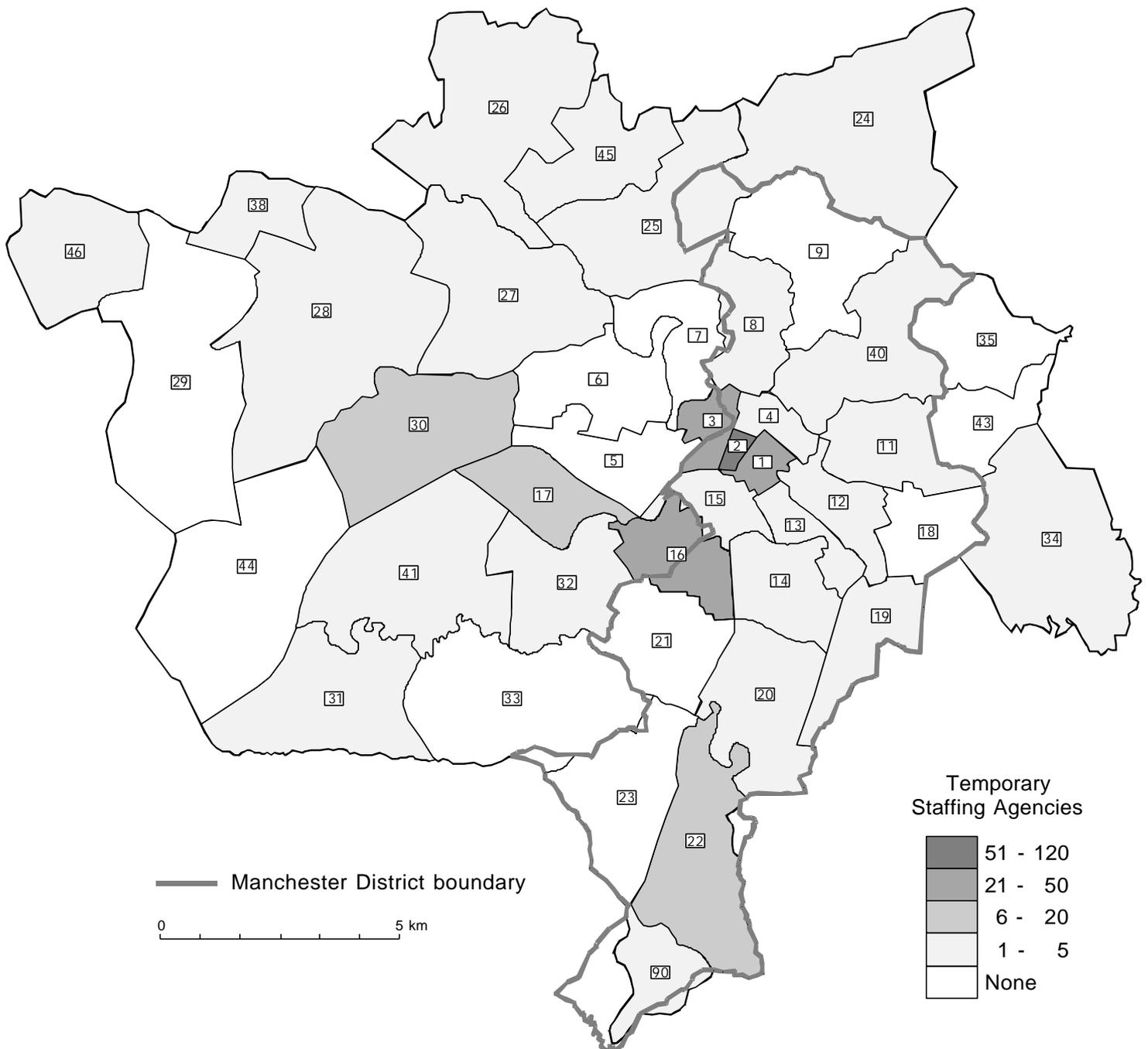interviews performed with agency owners and managers to examine its modus operandi and configuration.



**Figure 1: Mapping Manchester's temporary staffing agencies**

**4.1 Models of the temping business**

Evidence from the US temp market suggests that the bottom end of that industry is fast moving, workers being placed on a day-to-day basis on low hourly rates, and that competition amongst agencies is placing a continuing downward pressure on margins (Peck and Theodore, 1998). Although there is no evidence of such an extreme version of the industry in Manchester, cost does appear still to be a defining characteristic of the local industry (Table 3). As one manager of an small independent specialising in the placement of 'technical' temps explained:

> I've found in … Manchester … that clients are only bothered about price. Their most often quoted objections are that 'you're all pulling from the same pool of labour so why should I pay more to get somebody from you when I can get the same guy from X,Y, Z agency. In my opinion they are more bothered about price than anything else (Interview 3, September 2001)

Another manager, this time at one of the largest multi-national generalist temporary staffing agencies, confirmed this cost-first competition:

> Our competitors are constantly reducing the rates to what I think are ridiculously low and on a couple of occasions we've lost out because of price. We are not the most expensive but we aren't the cheapest and it is the cheapest that is winning at the moment (Interview 7, October 2001)

The growth of smaller agencies performing their business at the lower-end of the market has in part intensified competition and led to the downward pressure on prices:

> The explosion of very small, low cost operations … that don't need a licence to operate has meant that prices have been driven down. You've got the wrong effect happening for the market that we are in. We should be in a position now where - well you probably know about market stratification and basically it just follows that the traditional skills, emergent skills and hard to fill skills and you apportion a different band of charges. We used to operate to that in the early days because there was only ourselves and one other in the entire area. We could get people a lot easier and charge a lot more for them because nobody else was doing what we were doing. Competition exploded

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over the last five years. When we had a boom everyone got on the bandwagon and the only thing a lot of these people can offer - because they cut corners - is a cut price. There are agencies that will run an ad, speak to somebody over the telephone and send them out to work, rather than doing the whole lot because hey, they're only in it to make money and they're not really bothered about providing a service (Interview 3, September 2001)

Low barriers to entry mean that at least potentially there is always another agency prepared to recruit and place workers for less. Even towards the top-end of the industry new entrants have sought to capture market share through pursing a low price strategy. As a manager of an independent law agency bemoaned:

Everybody moves in and floods it, and makes a mess of it and then none of us make enough money then. It's a very greedy industry and it is also a dog eat dog very competitive industry. There is always somebody at your heels trying to get at your business (Interview 11, October 2001)

And it despite the claims of the largest agencies it is not always the smaller independents who lead the race to the bottom: the larger independents are able to take some business on at a loss in the short-term, forcing out competitors and then taking over their market share.

**Table 3: Restructuring in Manchester's temporary staffing industry**

| Industry segment/ Characteristic | Lower-hourly rate occupations (Clerical, light industrial, etc) | Mid-range hourly rate occupations (Education, healthcare etc) | Higher-end hourly rate occupations (Accountancy, Law etc) |
|---|---|---|---|
| **Barriers to entry** | Low | Medium | High |
| **Degree of commodification** | High | Medium | Low |
| **Volume** | High | Low | Low |
| **Margins** | Low | Low and high | High |
| **Service delivery** | - Minimum screening <br> - Basic training provision; | - Full screening <br> - No training; | - Full screening <br> - No training |
| **Nature of agency-client firm relations** | Formal | Formal | Informal |
| **Management style** | On-site and intensive | Off-site and intensive | Off-site and relaxed |
| **Competition logic** | Cost | Mix | Non-cost |
| **Market leaders** | Large multinational generalists | Mix | Niche specialists, either multinational 'brands' or independents |
| **Geographical location** | Out of town (for cost) | City centre (to be | City centre (to be close to clients |

| | and city centre (for 'high street' market) | central but not on 'high street') | but not on 'high street') |
|---|---|---|---|

Lower-end relations took two forms: for volume placements contracts were agreed, for ones and twos arrangements were often more informal (Table 3). In the latter of these the workings of the temporary staffing market were built on relationships of trust. Arrangements were often verbal. Supplying a client firm one week did not always mean that an agency would have that business the following week. As one owner of an independent agency supplying industrial workers explained:

> There is nothing in writing from [large UK retailer] … There is nothing in writing from any of our clients that says 'we will definitely use you this time next week'. We call them contracts but we are wrong to because they are not contact agreements (Interview 13, October 2001)

The risk associated with smoothing the business cycle rested with the temporary staffing agency. If the client firm decided it no longer wanted temporary workers the following week then there was little the agency could do. However, for this agency at least, not being involved in contractual relations had its benefits:

> We don't have any contracts, but Blue Arrow, Manpower and Kelly all the big ones very often supply on a contract basis. That is a double-edged sword because there are usually penalty clauses and it becomes a lot more involved. The [large utility] contract that Pertemps have got for Call Centre staff has got penalty clauses. We don't have any because we haven't got anything in writing and we wouldn't. If you are supplying a driver for example you are charging the company whatever and you are making two pounds an hour. That company wants you to sign an agreement that says if that person doesn't turn up you will pay a £500 penalty. The odds aren't great. You only need a couple of no shows (Interview 13, October 2001)

Not just the size of placements differed from one part of the industry to the other: the pace of work was also quite different, as Peck and Theodore (1998) suggest in their Chicago research. One consultant

reflected on the change in the tempo of her work as she moved within Manchester, from one of the large generalist multi-nationals to work for a smaller accountancy/financial agency:

> The … thing that strikes me straight away is that it is a lot, lot slower. I was used to getting 18 bookings a day. Here it could be two bookings a week (Interview 12, October 2001)

In part the pace of work was slower because competition between agencies occurred on more than just a cost basis. As the consultant went on to explain:

> The first thing I would have to say is that the financial sector is not as cutthroat. It's not as much as a Dutch auction as the high street. At a high street a client will sit and argue with you about a secretary and ten pence an hour. She may say 'Kelly have quoted me 5.40 an hour and you are quoting me 5.50'. So at high street level you are arguing about pence. In the financial industry I haven't found that clients come back debating cost as much. They accept that this is what it is going to cost them. I thought dealing with accountants who are so penny conscious, but they don't seem to be as much (Interview 12, October 2001)

What is evident is that competition took different forms in different niches of Manchester's industry (Table 3). At the top end of the temporary staffing industry competition between agencies occurred not just in terms of price. Securing and maintaining market share involved being members of informal networks, of knowing the kind of 'product' the firm wanted. Placing a worker involved the agency knowing more about the client and their needs, as the manager of the law agency explained:

> It's word of mouth really and reputation. In the early days it was advertising and hoping you get somebody who goes to a lot of agencies and being very professional with them, quick off the mark and getting them interviewed and placed. Basically really looking after people and doing what you say you will for them. My motto has always been keep your head down, work hard and to be honest with people and I don't think you can go wrong (Interview 11, October 2001)

Generalists – those larger temporary staffing agencies that tend to have a presence on the high street – have recently looked enviously at the quantity and the quality of business done in the more specialised niches, such as law and accountancy. It appears from the outside to be higher margins, for fewer placements, meaning less work for the agency. For example, in Manchester's accountancy niche gross margins can sometimes be as high as 50%: for the generalist agencies margins can sometimes be as low as 5%. Not surprisingly, those at the top of the industry are keen to protect their market. While moving up the value-chain might be an attractive option to those below, the existing incumbents are unhappy at this prospect:

> The world and his mother have switched on to the fact that they can get higher bill rates and higher margins with engineering business. Massive damage has been caused by non-specialists getting involved (Interview 3, September 2001)

However, the financial specialist agencies remained confident they could still distinguish their 'product' from that being sold by the generalists, even if there is evidence of the two segments converging in some cases:

> There's a couple like Reed who have an accountancy arm but the simple thing is any good accounts is looking for a candidate will register with a specialist. So the generalists just don't have the candidates. They may be able to dabble but if a client goes to them with a serious request then they don't have the candidates (Interview 12, October 2001).

The differences in the two models can, in some cases, act as a barrier to the large generalist agencies entering the higher-end segments:

> I think it is too slow a turn around. They deal with a very quick turnaround. It's quick money. The margins are lower but its much higher volumes. We could go two months and not be in profit but we can ride that (Interview 11, October 2001)

Lower-end agencies are likely to continue to seek to enter the higher-end segments. Some will make it, capture market share and get a piece of the higher margins, lower volume business. Most of the agencies that do their business in the more traditional 'temp' segments of Manchester are, however, destined to stay where they are. Not only is this where the temping model has come from but it is where it appears to be stuck. Evidence from the US – the most mature of the national temporary staffing industries – points to an industry that is unable to escape from its industrial past (Peck and Theodore, 2002). Although in continental Europe agencies have been more successful in moving up the human supply chain (Ward, 2001), UK urban labour markets continue to resemble more closely their US equivalents. And for agencies this means low margin, high volume placements will continue to be the industry's staple diet.

## 4.2 Making moves: attempting to change the relationship between client firm and temporary staffing agency

In terms of the ways in which agencies expand the segments in which they place workers, a common strategy is to respond to the varying demands of existing client firms. Already doing business with an agency, clients might begin to re-think their recruitment practices for other areas of their workforce. The practice of the agencies in regularising temp work makes it – as a source of labour supply -- more attractive to client firms. As one manager explained about the movement into the industrial segment:

> We had to do very little groundwork to introduce it because we had a base of engineering clients who used to ask us for labourers, storeman, and crane drivers. So we could say to them 'hey we're doing it now. We've got someone dedicated to finding those people'. In the early days, 75% of the industrial clients were also engineering clients anyway (Interview 3, September 2001)

Once the agency has increased the number of industrial sectors they will supply workers to the next step up is often the adding-on of extra services. In their study of Chicago, Peck and Theodore (1998: 671) found evidence of what they referred to as 'restructuring up', defined as 'the increased strategic integration

of the management and scheduling systems of temp agencies with their corporate clients'. In terms of deepening the relationship with clients, this trend is evident in Manchester:

> At the end of the day, the smart HR professionals realise that theirs is a very complex, multi-task job and recruitment forms a very small part of that. We are recruitment experts: that's what we do for a living. So it will pay to say 'go and do that for us' because they can concentrate on the more important issues like motivating the workforce they've got. *So being bolted onto their armoury is definitely a trend* (Interview 3, September 2001)

> The range of services that we offer has grown and grown … We are offering more [of the] entire HR function now. For example, we do response handling for adverts when we do advertising on behalf of companies who don't want their name out or that just don't want to deal with the response from the adverts (Interview 2, October 2001)

As this manager of a large generalist agency explained, in order to be competitive in Manchester often means that agencies have to keep on adding an extra service here, an extra task there:

> Over the last year or so we've been working with a company … from Warrington. They have got HR onsite but they've been recruiting a hundred people at a time. That's all coming through us. We're doing the advertising, we're knocking the adverts up, we're getting the adverts published, we're advertising under our name and their name, we're doing the initial screenings and the first formal interviews. Basically, they give us the job and we give them a shortlist two or three weeks later. So we've taken all of that away from them (Interview 2, October 2001)

On the one hand, the relationship between agency and the client firm appears to be becoming a closer one. Agencies are trying to involve themselves in the decision making process of clients, to make themselves almost irreplaceable (Ward, 2003a). However, on the other hand, other changes are also occurring in the relationship between the client firm and the temporary staffing agency. Who within the client firm agencies deal with has begun to change. No longer are the agencies dealing with workplace managers. Instead they have begun to deal with central human resource managers, as recruitment decisions within

firms have been centralised (Cully et al., 1999). This trend has disrupted existing local relations built on reciprocity and trust. As managers at both an independent and a multinational agreed:

> It's down to relationships and trust ... We are finding with some of the bigger users is that when the purchasing guys get in they are not interested in trust: it comes down to the cheapest. That is a risk in our business. It destroys part of it … and also undervalues the service (Interview 5, September 2001)

> I'd say it was more HR contacts. A lot of companies now have streamlined and said they no longer want separate department heads and team leaders to do recruitment because they are using five or six agencies and they can't control the costs and don't know what temps are from where. Certainly a lot more companies go through HR. We can go out and meet with the other people to get a better understanding of the role but it is through HR (Interview 7, October 2001)

It is clear that the relationship between the agency and the client firm has changed in recent years. As the Manchester industry continues to evolve so some agencies are seeking out new ways of refashioning their relationship with their clients. Widening the industrial sectors they service and adding on extra services spreads risks for the agency and means they become less of a temporary and more of a structural feature of a client's business. For the client, centralising their relationship with agencies allows them to extract cost concessions, as we see shall see in the next section.

### 4.3 The effects of industry innovations in Manchester

One trend in the different temporary staffing industries, from North America to Western Europe, is the emergence of national and global agreements, and with them, preferred supplier lists. Manchester is embedded in these global networks, its own market shaped by the existence of preferred supplier lists. In some cases this mean Manchester's local independent agencies lose business:

> We're coming up against them all the time. It happened to us this week … They've only got two centres if you like, North east and North west, and previously what they've done is say 'we've got

our North west agency and we've got our North east agency'. Somebody has said to them 'give it us all and we'll do it for nothing.' That's what is happening and it freezes you out of the market. Unless they really struggle they won't come back and even if they do they'll want you to do it, you know, somebody there is getting 100 people for 50p and they'll come back to you and say 'can you do it for 50p?' The whole market changes (Interview 5, September 2001)

I was involved with [a large account] in Middlewich with [a large agency] and they are called the master vendor and all Tesco's business goes to [the large agency] and then they take 70% of those requirements and feed the extra through to myself and [a multi-national agency]. You just end up building up there business. You're not getting respected as a supplier of Tesco: you're a supplier of [the large agency] and just building up their business (Interview 8, October 2001)

The implications of the emergence of national agreements are not then limited to the particularities of one agency's relationship with a client firm. Rather, the implications are more systemic, as the structure of the market is changed. Once an agency in a particular segment of the market becomes involved in a national agreement, then the local labour market for workers in that niche changes, with rates of pay and margins squeezed:

They sign these wonderful national agreements. Everybody hates national agreements. Anybody who is tied to them resents that fact that they have a preferred supplier list. What happens is that you will get a centralised call centre, we work 24/7 like our clients and if a client needs to speak to us at three on a Sunday morning that's when he needs to talk. By four it's too late. Nobody likes these agreements. IF they call at three in the morning they are talking to someone who arranged, with Blue Arrow they are calling a centralised agency and its 'who are you again? What's your site?' Two hours later and they are still waiting for an answer. It's not efficient, it's not effective but they have to stay with it. That is a problem for us because obviously we couldn't provide national coverage and if you've got a company like [a large retailer] who spend whatever it is on temps each year and they go to Manpower, the margins are shaved and shaved and shaved (Interview 13, October 2001)

In other situations, national agreements meld with existing relationships to produce a hybrid type of agreement. Local client managers find ways of circumventing national agreements and continue to work

with local independents.  As an owner of an agency, placing workers in the catering, leisure and tourism segments, explained:

> For example the [firm's name] is one.  All their workplaces have to work with a nominated supplier and we are not the nominated supplier.  But what actually happens is that the unit at this level says 'ok' and send me 100 staff.  So we are on their list as an occasional supplier, which is like supplying all the time (Interview 1, September 2001)

For those agencies party to national agreements the challenge is to fill the contact without resorting to using a second tier competitor (Ward, 2003a).  However, turning to a competitor can have its advantages. If they then are not able to fill the contract then the primary agency's stock with the client firm rises:

> We've got a lot of national contracts.  In one case we have a service level agreement with them that says 'we will respond to you in this amount of time, we'll get you the candidates'.  If we can't, then we will turn to second-tier agencies.  We have deals with our competitors, basically.  If we can't find the people, we'll give them a shout at it.  We've done that a couple of times … and they've had no luck either.  But as we're confident enough to say 'if we can't find you someone, then we really don't think our competitors can'.  The national deals are becoming more and more important (Interview 2, October 2001)

But the national agreements are not without their contradictions.  A local manager of a large multi-national agency explained how, while they would like to maintain their non-national business, national contracts nevertheless smooth income streams, providing a degree of business stability:

> We would rather as a company have more regional and retail business definitely.  But for any [agency] you need a certain amount of stability and that's what [national agreements] offer us.  I do know that the large national accounts we only want at the right price: there have been some occasions where we have large accounts and we don't make any money (Interview 7, October 2001)

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The same agency was also aware that its relationship with other agencies is that of a 'second tier supplier' (Ward, 2003a).  It is happy with this arrangement as it can take advantage of the inability of its competitors to achieve the required standards:

> We've had a number of occasions recently, companies have come to us, they've got agreements with other agencies that they've not been to fulfil or they have filled numbers but not quality.  We are getting quite a lot of business on the back of other agencies not being able to deliver (Interview 7, October 2001)

While this might be the case in the generalist segments, in the legal niche the competition is so tough, and the absence of suitably qualified workers so great, that sub-contracting, or performing as a 'second tier' supplier is not considered an option:

> It is to dog eat dog here.  It would be lovely in fact I did try it once and got my fingers burned. You give them your information and it's a very bitchy industry and you give them an inch they take a mile.  You say I'm struggling have you got this person, it is yeah yeah, you send their person in, they bill you, but they will bully their temp for the information.  Who was your contact? Who did you work for?  Next time that temp is free the agency will ring the client and say 'the temp you had through [the agency] six months ago you really liked her I've got her free do you want her?' (Interview 11, October 2001)

In Manchester there is evidence of some parts of its temporary staffing industry being re-made due to the national agreements reached elsewhere between agencies and client firms.  This is particularly the case in those segments of the market where a large numbers of workers are placed on a daily and weekly basis. Formalising or regularising relations allows client firms to do their business with agencies at lower margins. For the agency national agreements insulate some parts of the market from local independents and provide the named agency with guaranteed market share.

## 4.4 State/market boundaries

A final trend evident in Manchester's temporary staffing industry has been the increased attention paid by agencies to the state sectors. Seeking to smooth income streams over the year and to protect future revenues some temporary staffing agencies in Manchester have sought to increase the business they perform in niches insulated from economic cycles. And, perhaps not surprisingly, the state sectors are the ones that have caught the attention of agencies. Evidence from other English cities confirms that agencies are falling-over themselves to secure agreements with the public sector (Ward, 2003b).

With one in four of the city's workforce employed in the public sector (Manchester City Council, 2002a), Manchester's state sectors constitute an attractive and an as yet under-exploited market for agencies. Government reorganisation in the form of the outsourcing of service delivery and the restructuring of the education, healthcare and social work sectors has increased the demand for the services of temporary staffing agencies (Conley, 2002). As a senior consultant in one of the largest UK agencies explained:

> Obviously the main benefit for us is that we bring all our specialisms together … Instead of operating differently what we can now do is offer a whole package that means that every individual division within healthcare works together so that we are offering that holistic package. The benefits for us … I mean we had to do it because more and more tenders are being applied for and advertised as more outsourcing is done by local government and main government then you have to go in at that level. For us the benefit was to maintain our business otherwise we would lose it on that individual supply and demand business. The benefit of working together is that we can offer solutions to recruitment problems that they are having nationally anyway. Cost wise as well, it's cost effective for us to work as a division and offer a complete package rather than to have to go out and go to different organisations who can't supply the whole spectrum of things. So we had to do it for survival and that is our biggest motivation (Interview 10, October 2001)

Manchester City Council has recently noted the increase in the amount of business it does with temporary staffing agencies. Rather than continue to deal with agencies that see the public sector as a way of making easy money, the Council has acted. It announced in early 2002 the formation of 'Manchester temps', which 'will operate along similar lines to any high street agency' (Manchester City Council, 2002b: 2). The

rationale was to cut costs and to retain 'temps' with experience in the workings of the Council. According to a senior figure at the agency, the logic behind its establishment was:

> [The Council] have been using agencies … for years, but the last couple of years they have spent a phenomenal amount – it is millions of pounds that have spent on temporary staff, year-on-year within the council … there was a huge requirement for temporary staff within the council. So that's why we are here. We officially started trading at the end of April [2002] because in the past [the Council] has spent an awful lot of money using external agencies. … So it was a cost-cutting exercise in the main, but also the other thing that we acknowledged was that when you have got a temp from an external agency, when that assignment comes to an end, their commitment as such is to the agency, and the agency could send them anywhere, including places outside of the council. So it means then that we have then lost a resource … that could have worked in another department, that knows our systems, that knows how we operate. And so it was a way of trying to retain that skill within the council as well (Interview 15, September 2002).

And the Council does not intend to stop there: in the future it sees itself entering into competition with agencies, marking the further blurring of state-market boundaries. As she goes on to explain:

> We aren't obviously competing with the external agencies to place within Manchester council, because it is now a closed shop. So that is our market. But the idea of Manchester City Council is that we will, ultimately, expand into other public sector areas. And in which case we would then be in direct competition with external agencies. So, for example, if I wanted to go and sell my business to the hospital, that puts me in direct competition (Interview 15, September 2002).

In the area of labour recruitment, the activities that were once turned inside out are now, through examples such as Manchester Temps, being turned outside in. The Council is bringing back into its organisation functions that in the recent past were outsourced to temporary staffing agencies. In a perhaps unexpected development, Manchester's entrepreneurial state agencies – that have overseen the introduction of a host of deregulatory initiatives and have fostered the emergence of a flexibility local culture – have themselves become targets for the city's temporary staffing agencies.

## 5. Conclusion

Manchester like a host of North American and Western European cities has struggled to adjust to the to the new realities of twenty-first century economic globalisation. As the city's manufacturing base contracted during the 1970s and 1980s so those involved in its economic development have had to re-think their approaches. To attract new investment into the city has meant economic and political agencies had to become more entrepreneurial, to work with local business elites or in partnership with other territorial groups. Emphasis has increasingly switched to re-imaging the city's space economy as consisting of flexible, innovative, and highly competitive individuals and firms, at both the higher and lower ends of the labour market. As the city's various partnerships have attempted to orchestrate a *re*-industrialisation of the economy so they have turned to one of the city's oldest (and least transparent) industries.

In the last thirty years the number of agencies in Manchester has increased by almost 300%. As the old certainties of the Fordist era, such as permanent employment, sheltered internal labour markets, and steady career progression over the lifecycle, have disappeared from the economic landscape, so business has boomed for the city's temporary staffing agencies. Agencies have secured themselves a position at the centre of the city-region's entrepreneurial regulatory regime. In the bottom, middle and top end of the labour market temporary staffing agencies have been able to refashion the very logic of the employment relationship. In a growing number of industrial segments, from the high hourly rates of the IT consultant through to the lower rates of industrial packers, agencies have acted to re-regularise labour relations. As more and more firms become clients of agencies so employment opportunities outside of what Bourdieu (1998: 85) terms a new 'mode of domination' are reduced. Workers are compelled to go to a temporary staffing agency to gain work, as agencies are at once the product of the wider deregulation of the UK employment system and agents in the active bedding-down of deregulation in city-region economies.

And Manchester is not alone. Evidence from the US and beyond suggests that city-regional economic development is increasingly premised on the emergence of an entrepreneurial regulatory regime (on Chicago see Peck and Theodore 1998, 2001; on Detroit see Gottfried and Fasenfest, 2001; on Leeds see Forde, 2001; on Silicon Valley see Carnoy et al., 1997; Benner, 2002). In light the global growth in the

temporary staffing industry (Ward, 2001) it is possible to use the example of Manchester to make some more general observations on the contemporary restructuring of urban economies and the growth in temporary staffing.

First, that as urban economies undergo restructuring so to do the likes of the temporary staffing industry: sectors who very business is intricately linked with the ups and downs of the economic cycle. As Manchester's manufacturing base has been eroded in the last three decades so its temporary staffing industry has morphed to meet the needs of the emergent industrial structure.

It is now a highly differentiated industry, recruiting, screening and placing workers as easily in high-paid, professional sectors as in low-paid manual occupations. The industry's growth reflects and at the same time reinforces the changes in the local industrial structure. It both facilitates economic restructuring and benefits from it.

Second, the growth in the business done by temporary staffing agencies reflects the growing individualisation of employment relations in the UK. De-unionisation, reduced coverage by collective agreements and the erosion of employer commitment to permanent employment have all been associated with, contributing to and being aided by, the growth in Manchester's temporary staffing industries. Once the archetypal industrial city, where work and identity went hand in hand and where the terms and conditions of workers were safeguarded, Manchester's economy now contains within it a growing and highly differentiated set of contingent labour markets.

Third, that the growth of the temporary staffing industry is directly related to emergence of entrepreneurial urbanism as a mode of regulation. As city – regional agencies strive to compete with one another for economic growth so the need to be able to point to a pool of workers who can be called upon, and dispensed with, at short notice  - what Theodore (2003: forthcoming) refers to as the institutionalisation of the reserve army of labour – has become paramount. Having temporary staffing agencies that can do this across a range of sectors facilitates the hiring of workers by new firms. In effecting recruitment in this way the industry cements its place as a labour market institution.

Fourth, the growth in Manchester's temporary staffing industry reveals how the outsourcing of hiring and firing practices has caught on. Successive waves of downsizing, reengineering, internal labour market dismantling and functional outsourcing means firms have become used to managing rather than actually performing certain tasks. In doing their business temporary staffing agencies have further contributed to the wage and employment opportunities inequalities that exist in contemporary urban economies.

In effecting change in its economic structure and its governance Manchester's elite has turned to one of the city's oldest and least understood industries. After a period of relatively stable and regularised employment relations the return to more individualised, precarious and insecure employment contracts has been facilitated by the growth and the diversification of Manchester's temporary staffing industry. It lies at the core of an entrepreneurial regulatory regime that delivers labour market flexibility on the ground, in the process changing the way labour markets are organised, structured and segmented.

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