



Adecco's offering in Workforce Management Solutions

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Disclaimer

Forward-looking statements

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Overview

Workforce Management Solutions – what does this stand for?

What changed in the last two years?

Let's talk some numbers

An evolving industry... “What's next?”

Beeline – the technology enabler

Conclusion

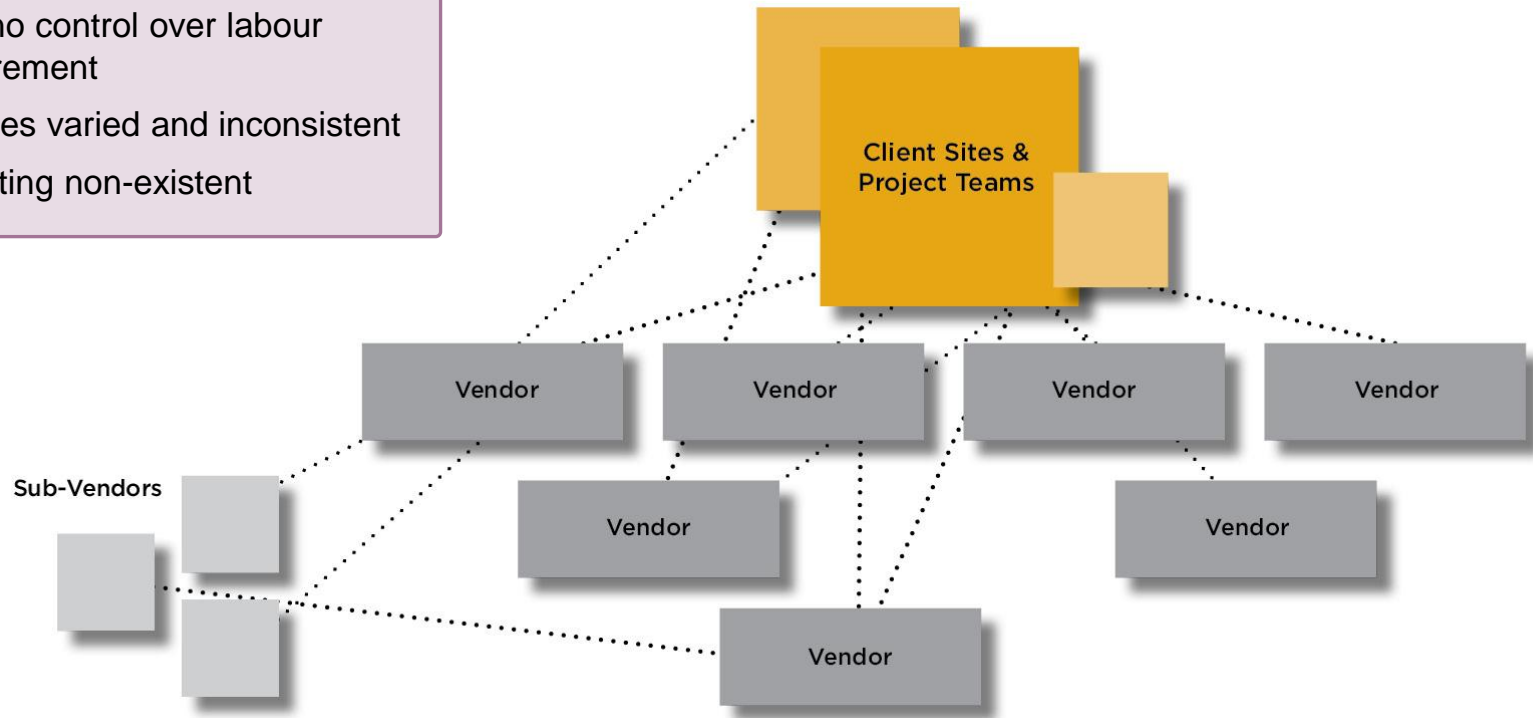
Workforce Management Solutions

The old workforce management model

A rather chaotic approach

Unmanaged state

- Little/no control over labour procurement
- Bill rates varied and inconsistent
- Reporting non-existent

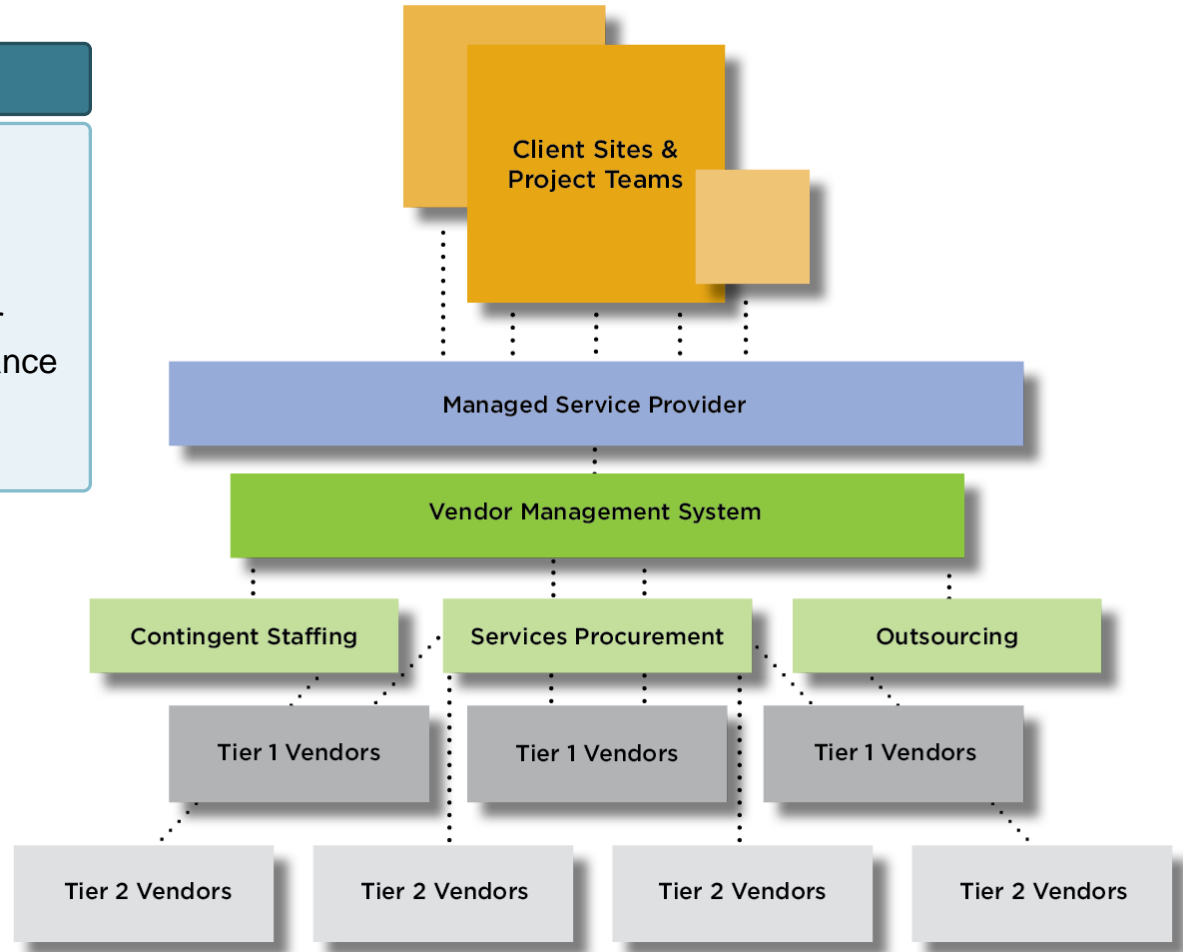


Today's improved workforce management model

Managed Service Programmes and Vendor Management Systems

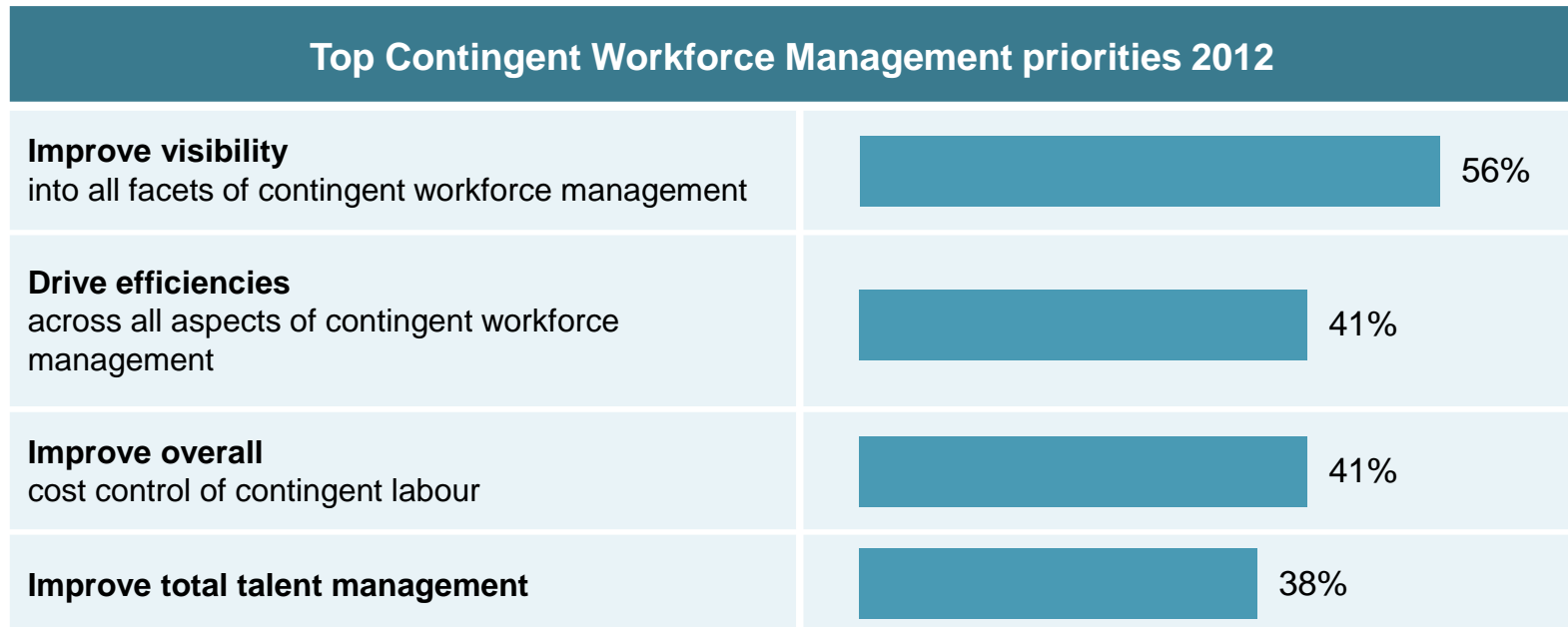
The new model

- Streamlined and automated process
- Significant cost reduction
- Real-time visibility into labour services spend and performance
- Vendors see all relevant job orders



Top contingent workforce management priorities

Increased visibility has the highest priority



N=250

Source: Staffing Industry Analysts Inc., 2012.

Benefits derived from MSP & VMS

Increased transparency and efficiency



Cost savings

Competitive bidding, managing to rate cards and various discounts



Visibility

Cost management, supplier performance, project quality, time to fill, labour geographical breakdown, workforce planning



Compliance

Transparent analysis of all stages of the procurement lifecycle provides greater control and ability to enforce procurement strategy and policies



Quality

VMS measures and monitors the performance of suppliers, contractors and SOW deliverables

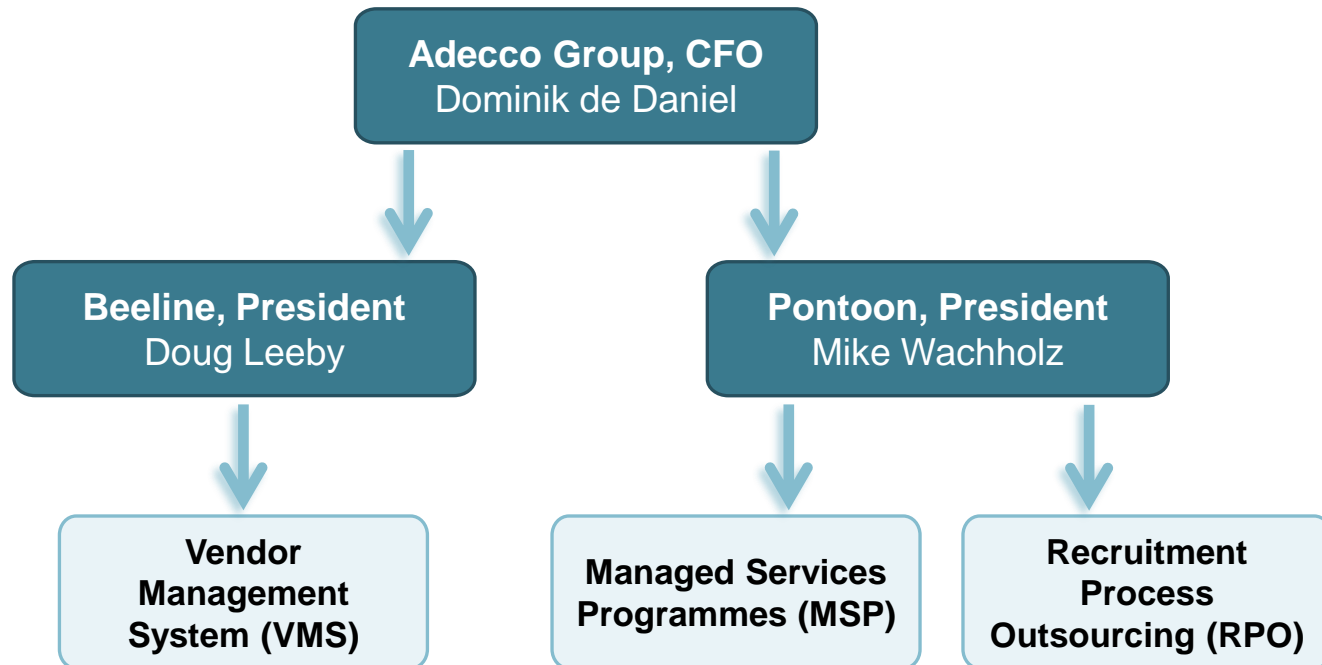


Operational efficiency

Process automation and consolidated invoicing

What changed in the last two years?

Organisational overview

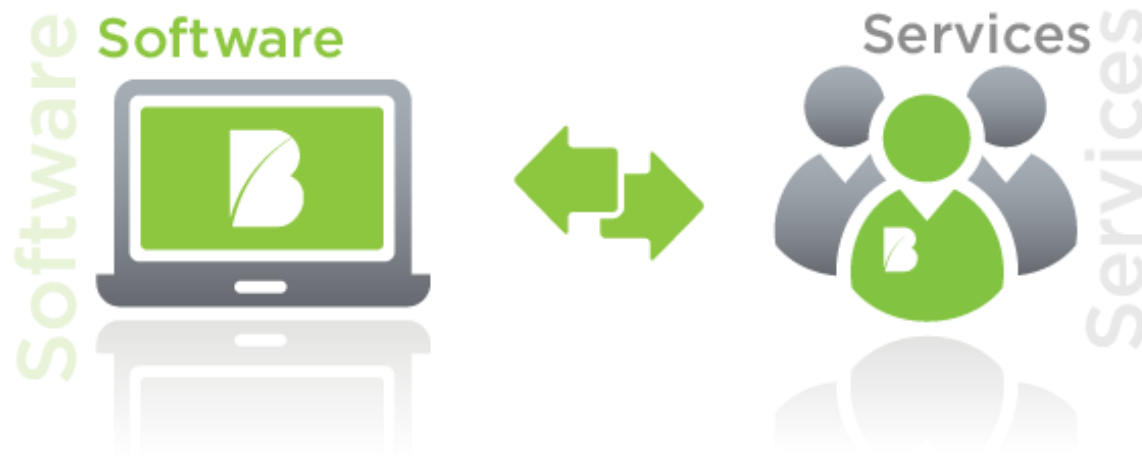


What has changed since we met in 2010?

Material global growth for all major providers (MSP and VMS)

Key facts

- Further consolidation in both the staffing/MSP space as well as technology
- Spend managed increases in 2012 to USD 92 billion from USD 66 billion in 2010
- Slow but steady shift to “Total Talent Management” (RPO/MSP)
- Material global growth for all major providers (MSP and VMS)
- Significant increase in Statement of Work spend managed (from USD 14.7 billion in 2010 to USD 34.3 billion in 2012)



Source: Staffing Industry Analysts Inc.

Continued technology consolidation

Workforce technologies are attractive targets



SAP buys Ariba
IBM buys Emptoris and Kenexa
Pinnacle buys Provade
Zero Chaos buys Workforce Logic

Changing needs of our clients

A more global and strategic approach to workforce management

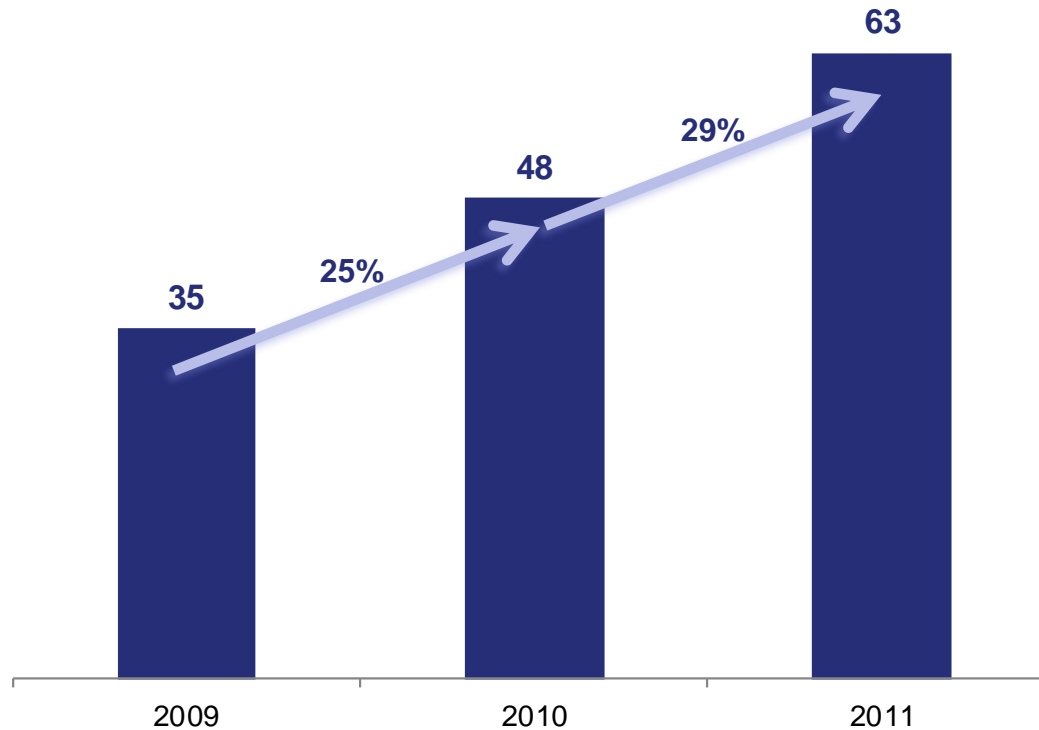
- Strategic management of the contingent workforce
- Manage more labour categories
- Manage more business units and globally
- Continued pressure to eliminate costs
- Talent shortage
- Demand for knowledge and expertise
- Compliance is increasingly important



Let's talk some numbers

Global MSP spend under management

Strong growth confirms the trend

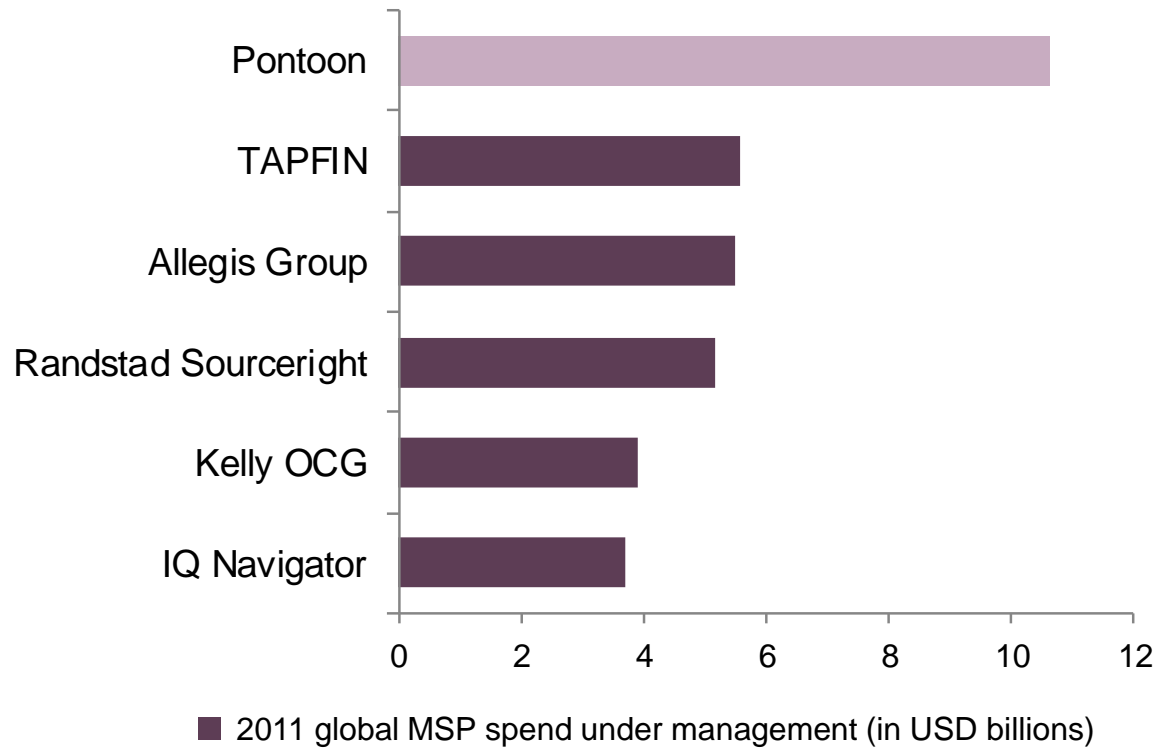


■ Global MSP spend under management (in USD billions)

Source: Staffing Industry Analysts Inc., 2012.

Relevant MSP competitive landscape

Adecco's Pontoon is leading by far



Source: Staffing Industry Analysts Inc. and Adecco estimates (includes master vendor services).

How MSP providers are chosen

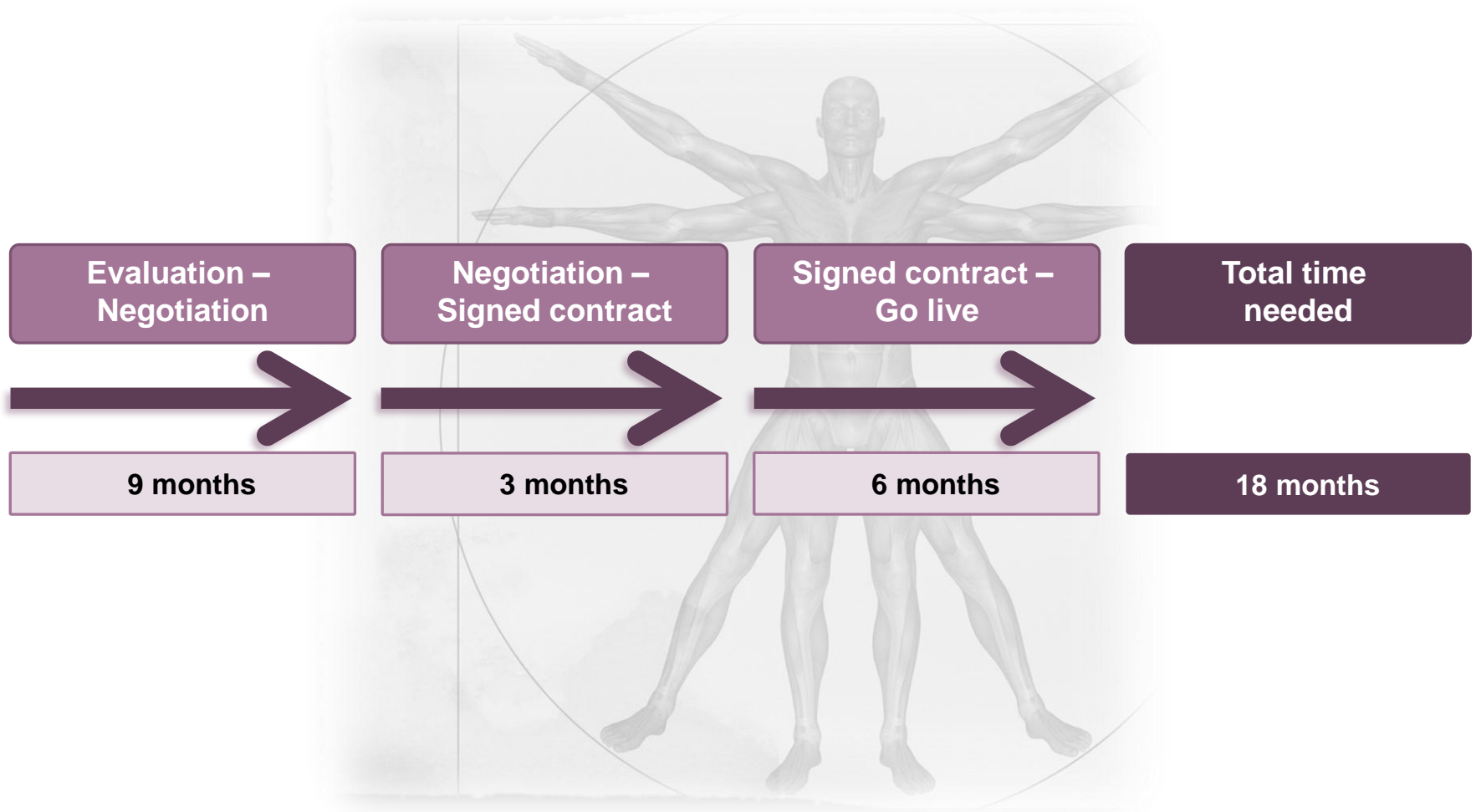
Pontoon is the perfect match

Companies choose their MSP provider primarily based on the following:

- Top 5 MSP provider
- Global footprint
- Human capital expertise
- Financial stability
- Cost
- VMS offering/partnership

Anatomy of a deal

From “meeting to money” takes up to 1.5 years



Real results

VMS as a door opener for MSP – client example

Programme history

- Client went live as a VMS only client in 2008
- Client's needs changed after using Beeline for 3 years

Solution

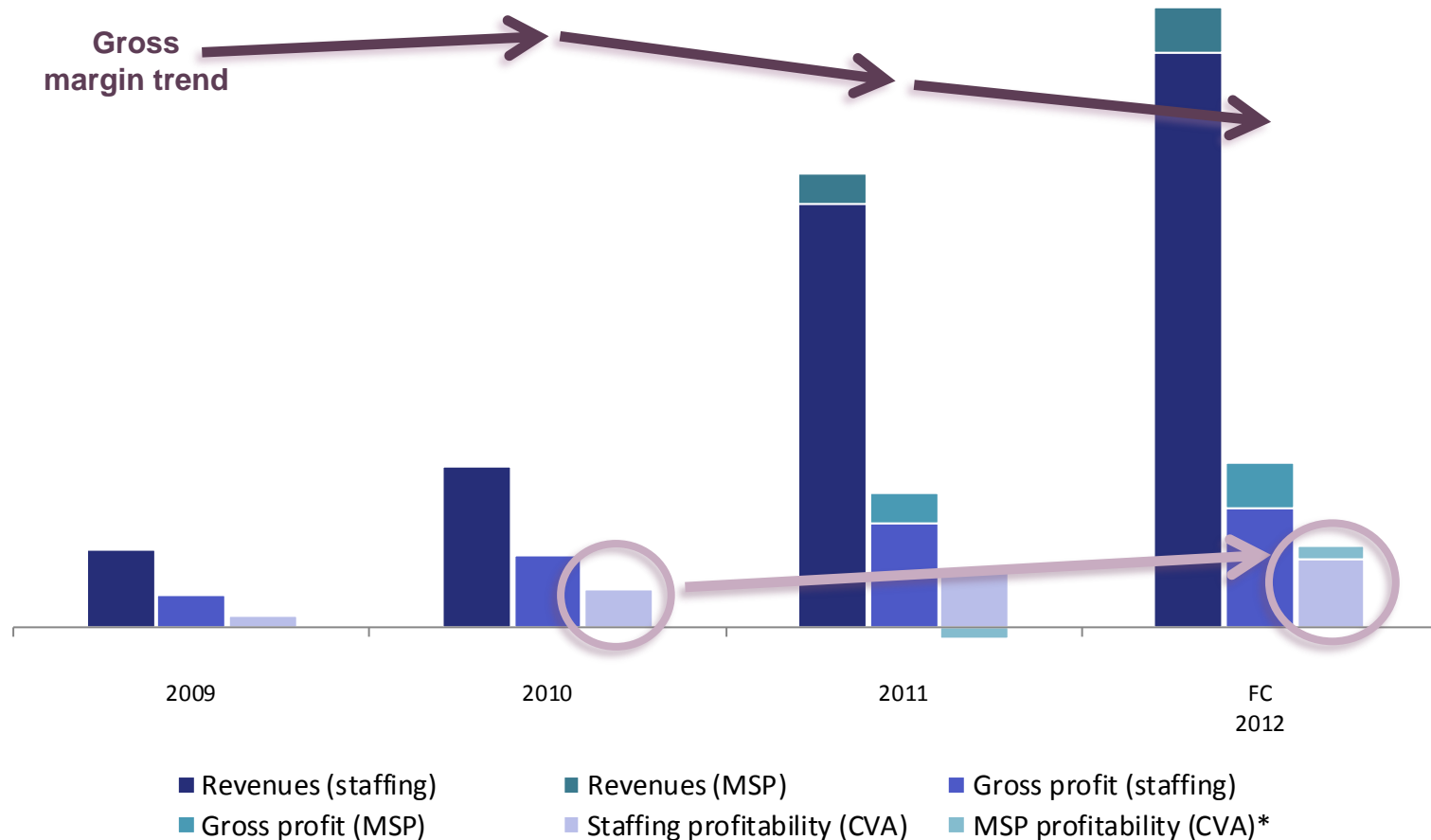
- MSP live in December 2011

Instant success

- Managed services team discovered client had been overpaying sales tax which resulted in a USD >640k refund to client
- USD >320 million in unclassified, unmanaged non-FTE labour that the MSP team is working to vet, validate and manage

How an MSP positively impacts us

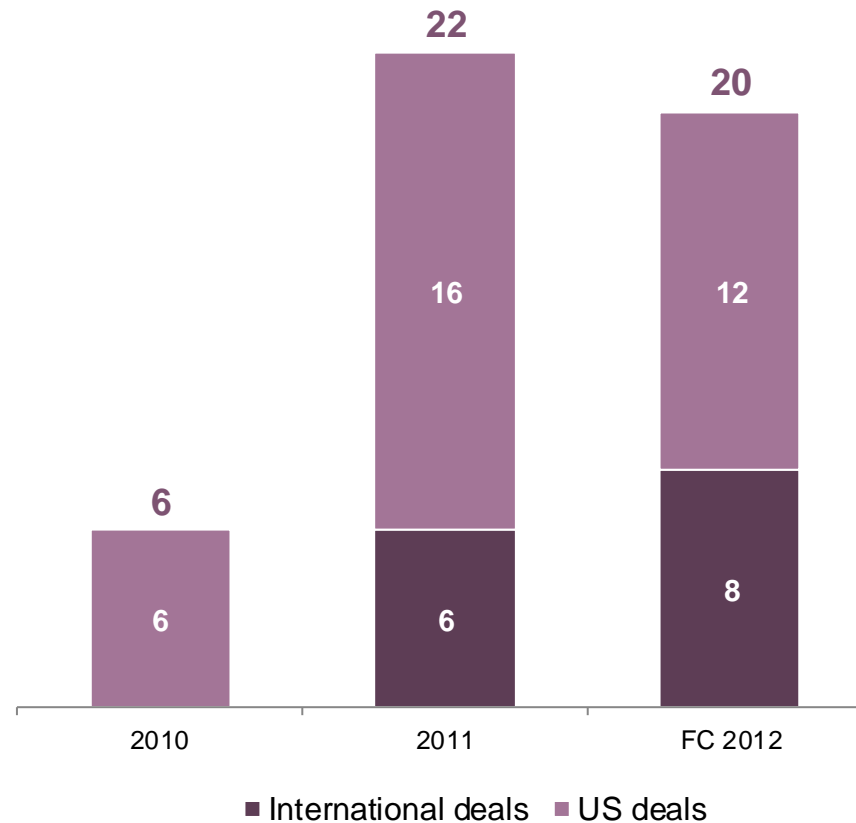
We more than doubled the client value added thanks to the MSP



* Year 1 includes MSP implementation costs.

Our MSP & VMS deals won

A strong acceleration since 2010 for us



An evolving industry... “What’s next?”

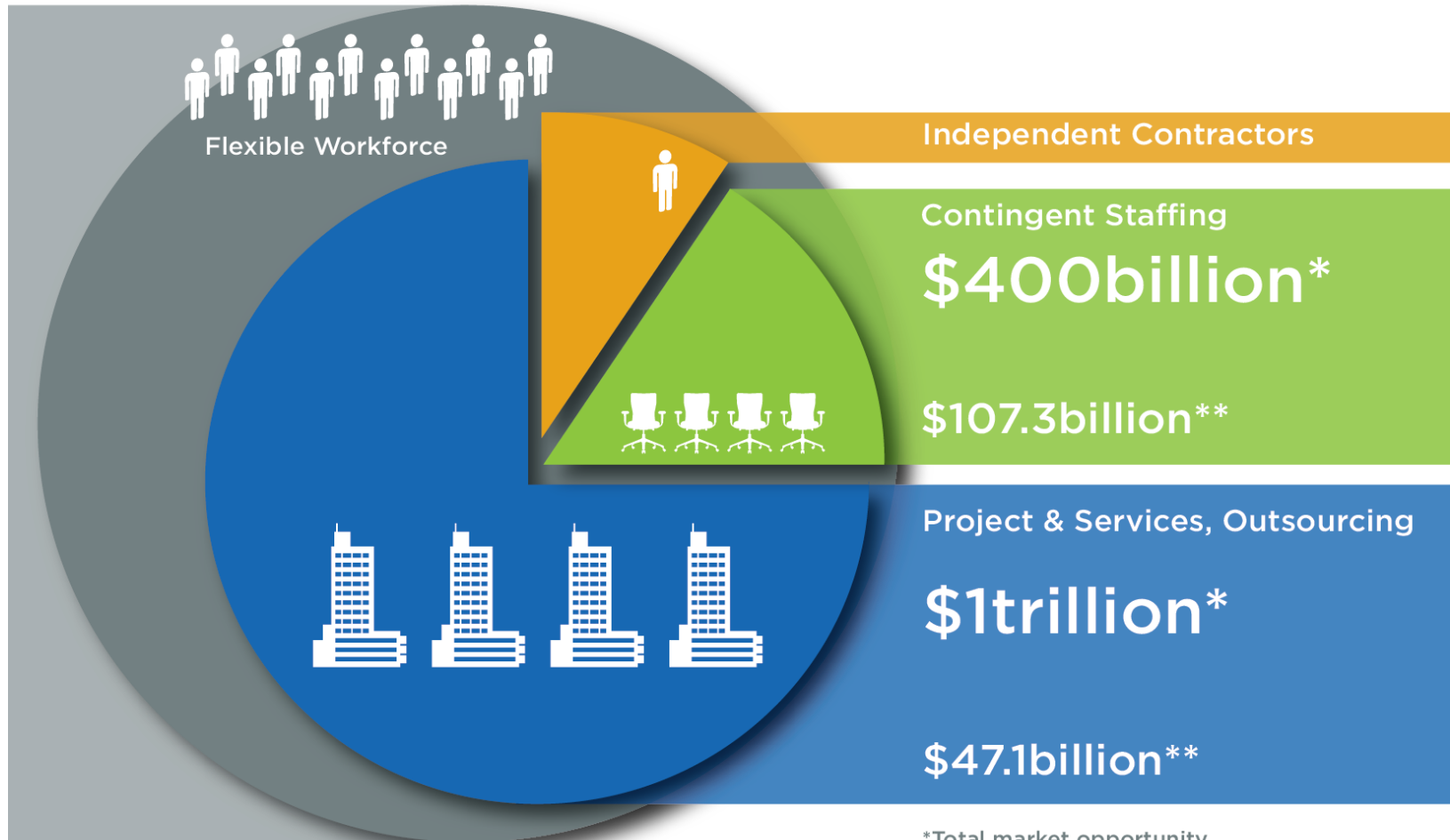
An evolving industry... “What is next?”

Outsourcing and global expansion offers huge potential



Managing all non-FTEs

Migration from just contingent to all non-FTE management



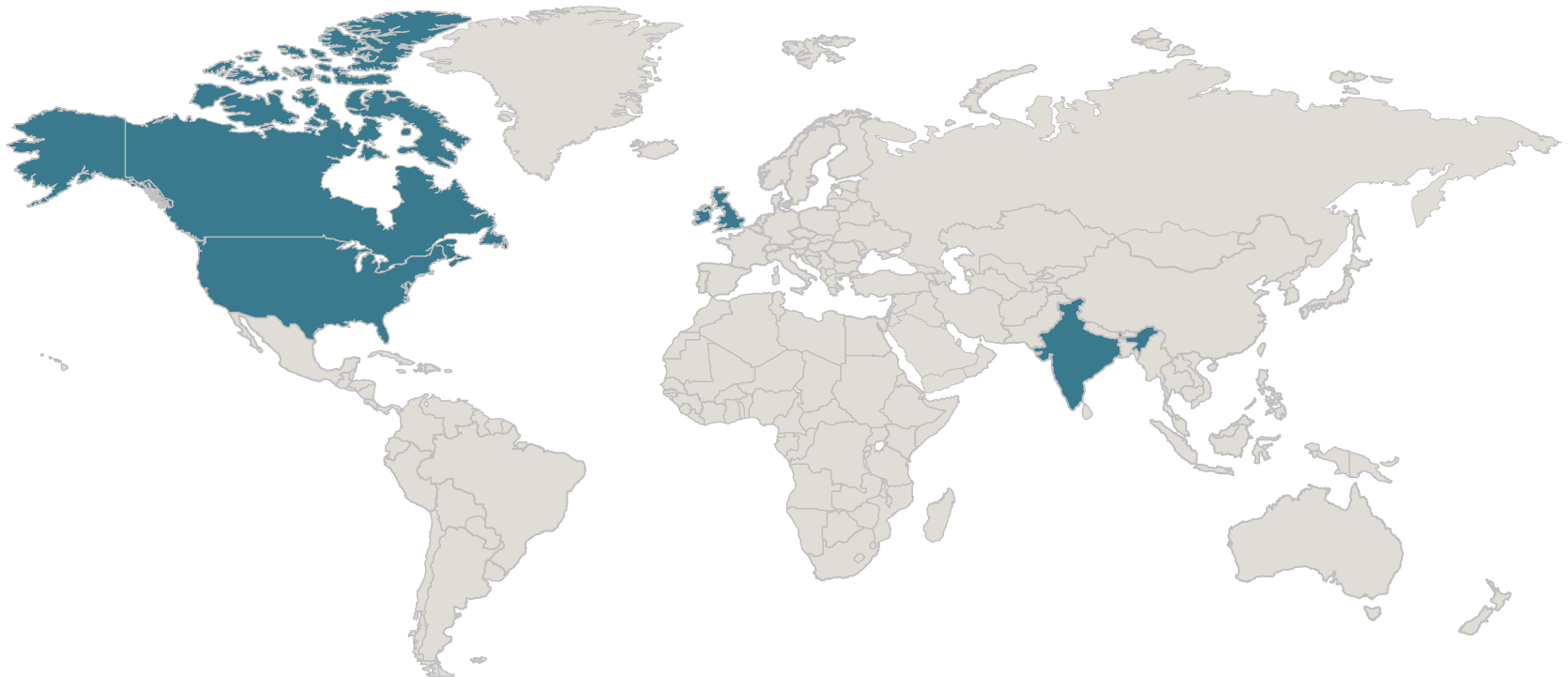
Source SIA 2011

*Total market opportunity

**Total spend under management

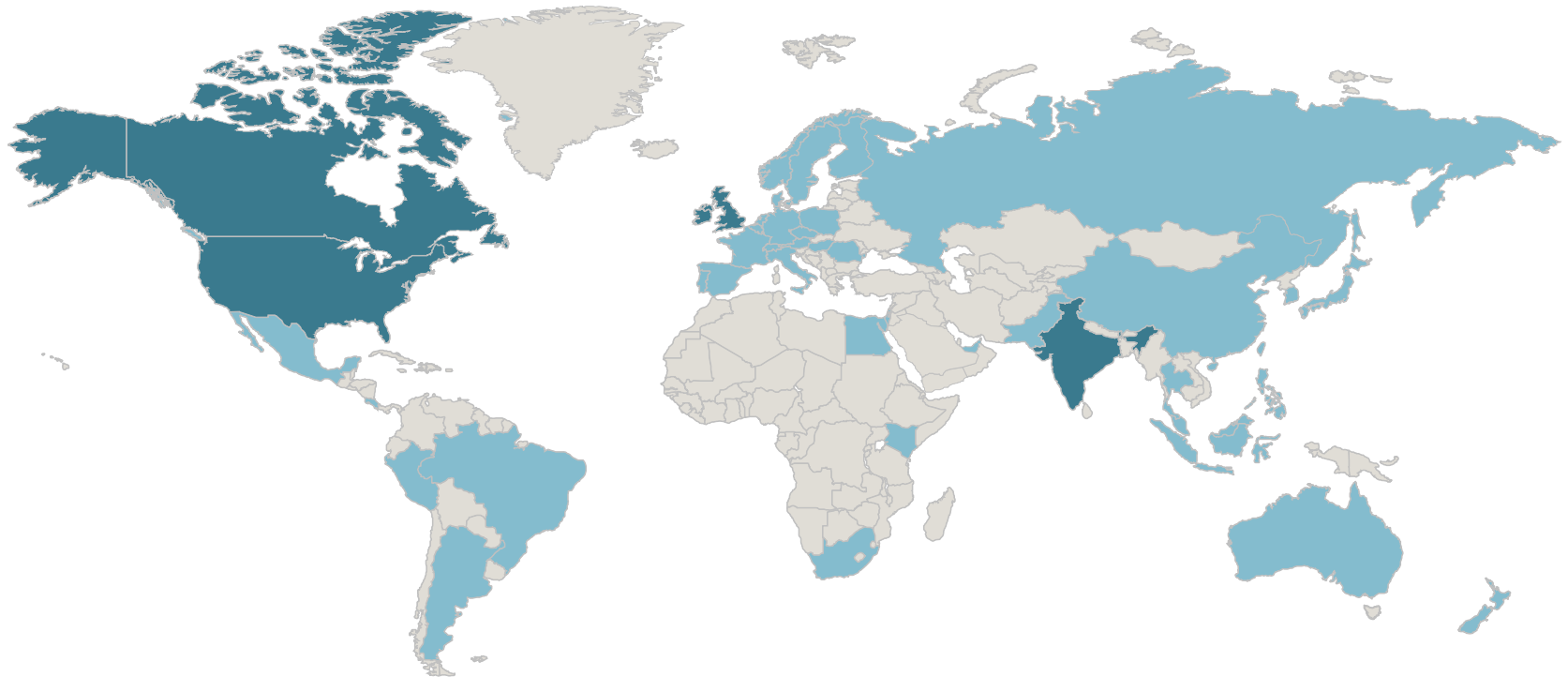
Global Reach – 2010

We were primarily active in North America



Global Reach – 2012

Expansion to EMEA and APAC



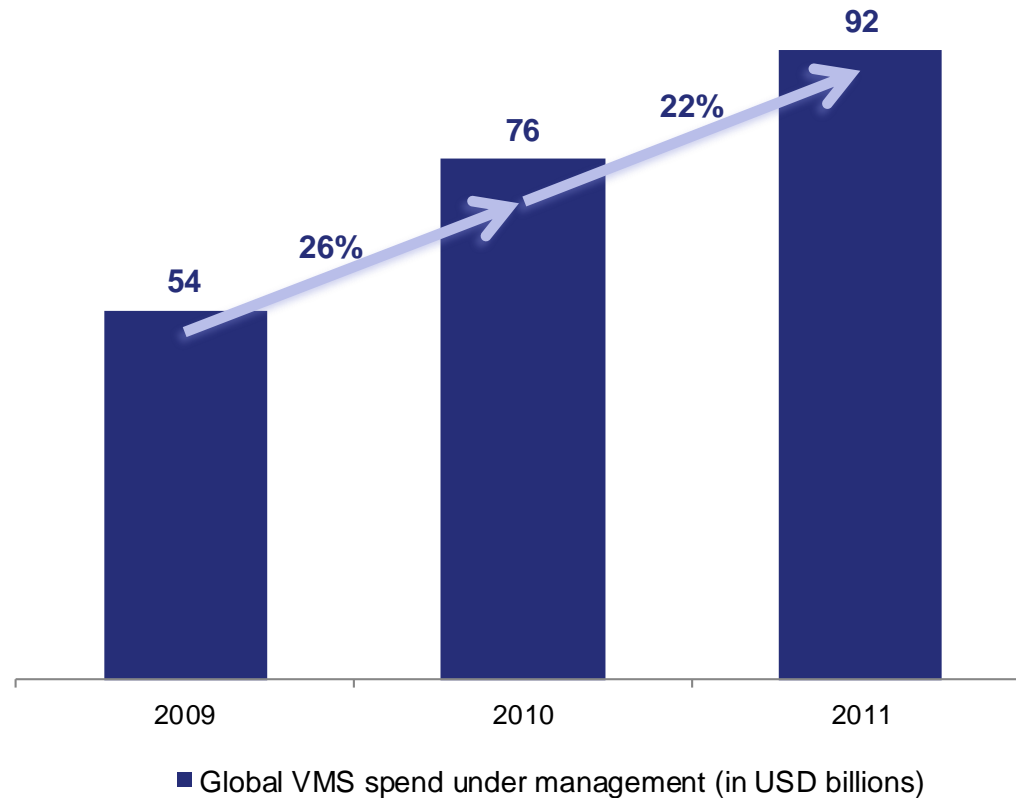
Beeline – the technology enabler

Technology is the great enabler....



Global VMS spend under management

Strong growth in the last 2 years



Source: Staffing Industry Analysts Inc., 2012.

Beeline's 5 VMS imperatives

Our recipe for success

- **Outsourcing services**
- **International**
- **Workforce intelligence**
- **Innovation**
- **Bulletproof technology**



Beeline expanded capabilities

Our technology has strongly evolved for local adaptation

2010	3 languages	5 currencies	7 localised	
	English	British Pound	Canada	India
	French	Canadian Dollar	France	Switzerland
	French-Canadian	Indian Rupee	Germany	United Kingdom
		Swiss Franc		United States
		U.S. Dollar		

Beeline expanded capabilities

Our technology has strongly evolved for local adaptation

8 languages	12 currencies	20 localised	
English	British Pound	Canada	India
French	Canadian Dollar	France	Switzerland
French-Canadian	Indian Rupee	Germany	United Kingdom
	Swiss Franc		United States
	U.S. Dollar		
Dutch	Australian Dollar	Australia	Luxembourg
German	Danish Krone	Belgium	New Zealand
Japanese	Euro	Denmark	Norway
Spanish	New Zealand Dollar	Finland	Singapore
Mandarin	Singapore Dollar	Hong Kong	Sweden
	Swedish Krona	Ireland	The Netherlands
	Norwegian Krone		The Philippines

2012

Analytics is the GAME CHANGER

Competitive Bidding

Build Rate Cards

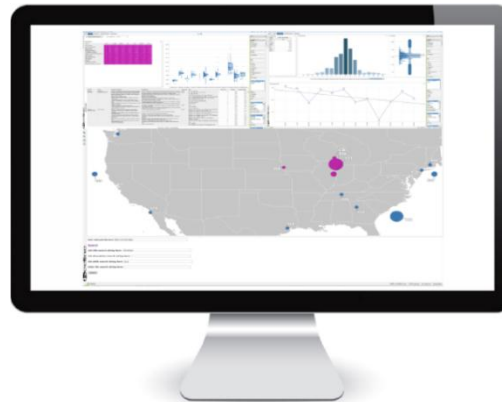
Analyze Rates

Identify Savings

Save Time

Review Recommendations

Generate Compliance



Technology innovation remains a key differentiator

Adecco invests to best anticipate the future



Employer Sign In / Sign Up

Fall In Love With Your Next Job

Get Started

or sign up with any of these services



Watch The Video



LYTRO



vimeo

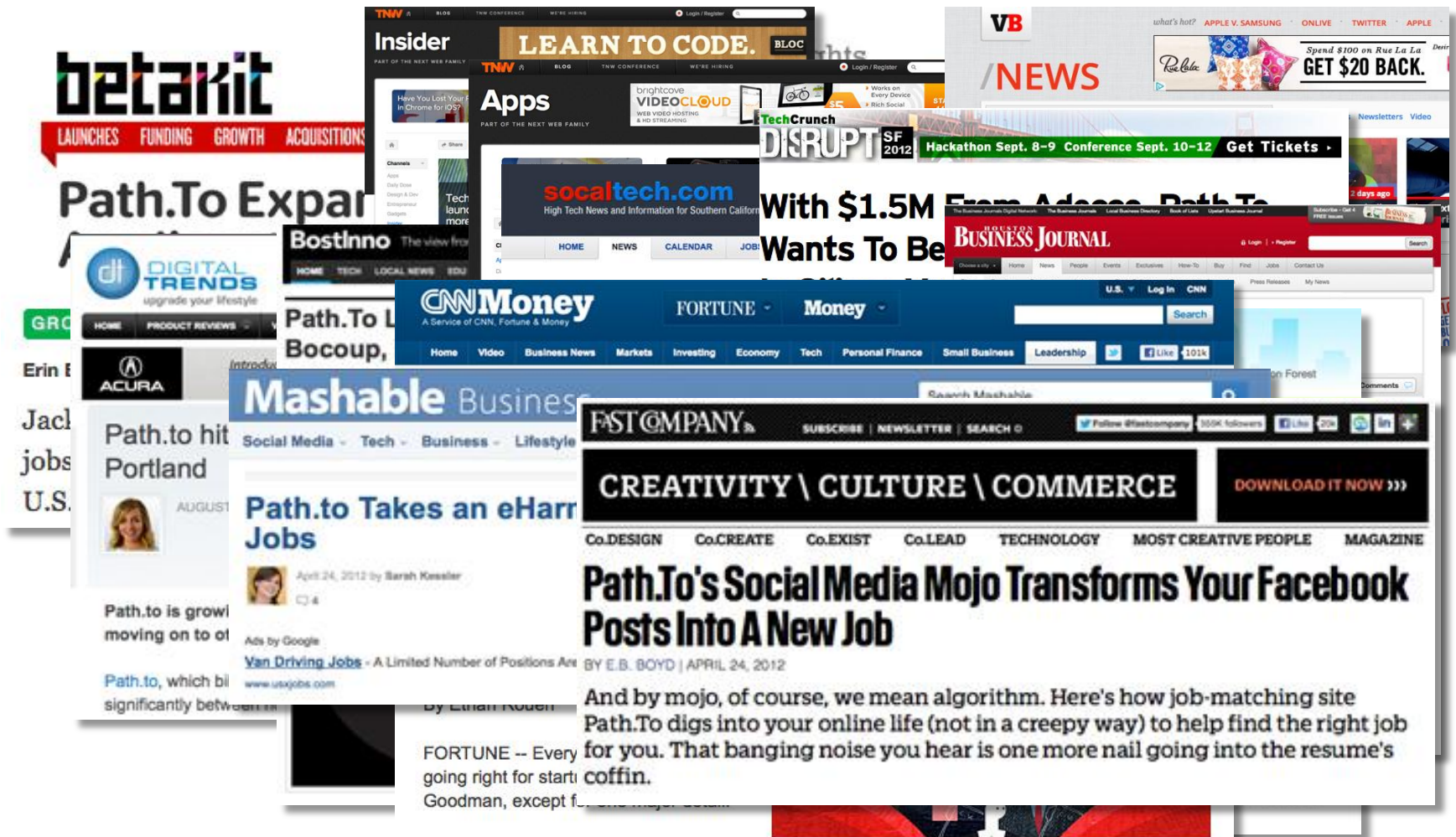


Joey, Software Engineer
"Looking for an exciting job at a startup"



We'll Connect You With Tech & Design Jobs You'll Love

Path.To press



Conclusion

Workforce solutions are an attractive opportunity for us

We are leading the trend



Adecco Group is well positioned to maintain the lead

Our asset is the global footprint and labour market expertise

