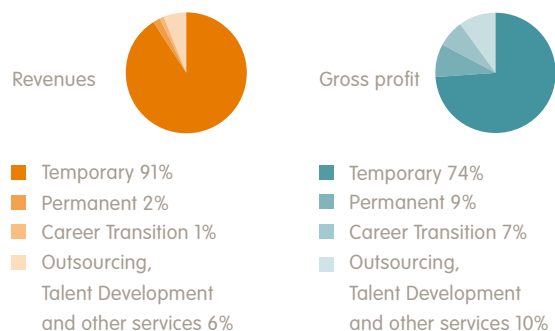


As the world leader, Adecco offers the full range of HR solutions tailored to meet the evolving needs of clients and associates around the globe.

# Our solutions and services

The Adecco Group's business can be viewed from different perspectives: by service, by business line and by segment. In this chapter we describe our services and solutions together with the business lines and brands through which we deliver these services. A review of our 2013 performance by segment can be found in the chapter 'Our results' on page 20.

## 2013 split by service line in %



## Our services

### Temporary staffing

In 2013, 91% of revenues and 74% of gross profit of the Adecco Group stemmed from temporary staffing services, which include general and professional skill sets, as described in the section 'Our business lines and brands' on page 18. Companies increasingly use temporary staffing services to quickly adapt to seasonal and cyclical fluctuations as well as to structural changes in the economy.

Employers can manage market dynamics by adding either flexible resources through hiring temporary workers, or fixed resources through adding permanent employees. Enterprises are similarly challenged to decide how to fill the gap when employees retire, change jobs or are temporarily absent (e.g. maternity leave, sickness or unpaid leave). For individuals seeking employment, we provide work opportunities and experience that increase their employability.

We handle all of the logistics of the world of work. We make contact with candidates both through on-line channels and through our branch network. We conduct interviews and match the client's requirements with the candidate's skills and needs to ensure a perfect match. Adecco performs all administrative tasks, like contract handling and payrolling. We always strive to find consecutive assignments for our associates to ensure they are continuously employed.

### Permanent staffing

Permanent placement services accounted for 2% of revenues and 9% of gross profit of the Adecco Group in 2013. When employers are confident on the economic development and on their need to fill certain key positions, they hire staff on a permanent basis. We have access to a wide range of top talents, including the hard-to-reach professionals who are not actively looking for a job. We search for candidates, screen the CVs and conduct interviews and assessments. We are committed to finding the right people for the client's business and will only propose candidates who have passed our in-depth screening process to ensure a perfect fit. We support our associates in ensuring that they reach their career goals, guiding them in selecting the right role for their skills and aspirations.

**Adecco Group business lines**

STAFFING		SOLUTIONS	
<b>General Staffing</b> <ul style="list-style-type: none"> <li>· Office</li> <li>· Industrial</li> </ul>	<b>Professional Staffing</b> <ul style="list-style-type: none"> <li>· Information Technology</li> <li>· Engineering &amp; Technical</li> <li>· Finance &amp; Legal</li> <li>· Medical &amp; Science</li> </ul>	<b>Business Process Outsourcing Solutions</b> <ul style="list-style-type: none"> <li>· Managed Service Programmes (MSP)</li> <li>· Recruitment Process Outsourcing (RPO)</li> <li>· Vendor Management System (VMS)</li> </ul>	<b>Career Transition &amp; Talent Development Services</b> <ul style="list-style-type: none"> <li>· Outplacement</li> <li>· Leadership Development</li> <li>· Career Development</li> <li>· Change Management Solutions</li> <li>· Training</li> <li>· Consulting</li> </ul>

**Career Transition (outplacement)**

Revenues generated from Career Transition represented 1% of Adecco's total revenues and 7% of gross profit in 2013. We assist clients in the effort to reorganise their workforce, due to mergers and acquisitions or when pressured to downsize as a result of reduced business activity. During the transition phase we support affected employees with training and facilitate their move to the next step in their career. We have the capabilities and expertise to manage an entire process, be it for a few people or thousands. We ensure that affected employees are engaged in transition activities and that retained employees remain productive, committed and focused on their work. It often happens that some areas of an organisation are downsizing while others are expanding and recruiting. We reduce transition and recruitment costs by redeploying employees affected by a downsize to areas in need of talent.

**Outsourcing, talent development and other services**

6% of revenues and 10% of gross profit of the Adecco Group in 2013 stemmed from outsourcing, talent development and other services. We see a clear trend of clients evaluating what to do on their own and what to outsource. In outsourcing, we include services where Adecco is not paid by the hours an associate works but by a task-related measure. This could be for example by the number of calls answered, the number of records entered into a database or the number of packages moved. Outsourcing also includes clients transferring Human Resources processes to the Adecco Group through Managed Service Programmes (MSP), Recruitment Process Outsourcing (RPO) and our Vendor Management System (VMS). Talent Development services include change management solutions and career and leadership development programmes. We assist our clients in maintaining productivity through changes, engaging and retaining talent and developing leaders at all levels.

**Our business lines and brands**

**2013 revenue split by business line in %**



**General Staffing**

In 2013, General Staffing made up 75% of the Adecco Group's revenues. We offer tailored solutions to retail and large clients with the aim of building longer-lasting relationships with both associates and clients. Given the relatively lower-margin nature of the business, an efficient delivery model is key to optimising our own costs and being competitive. General Staffing includes the two business lines Office and Industrial, as described below.

**Office**

Office represented 25% of revenues of the Adecco Group in 2013. We are specialised in the temporary and permanent placement of administrative and clerical staff. In order to provide the right combination of personal and technical skills, we mainly focus on the business areas Administrative/Clerical, Assistance, Customer Service, Human Resources, Import/Export, Project Management, Purchasing, Secretarial/Personal Assistant and Sales, Marketing & Events. Main brands in this segment include Adecco Office and Office Angels.

**Industrial**

The Industry segment accounted for 50% of Adecco's revenues in 2013. We serve our clients in the temporary and permanent placement of staff mainly in sectors such as Automotive, Man-

ufacturing and Heavy Industry, Construction, Hospitality, Transportation and Logistics. Main brands include Adecco, Adecco Industrial and Tuja.

### **Professional Staffing**

Professional Staffing accounted for 23% of Adecco's total revenues in 2013. With the 'experts talk to experts' approach we have a high-end specialist point of contact for our clients and associates alike. We establish relationships with line managers at enterprises to better understand the skills sets of candidates needed. This ensures successful matching of candidates' profiles with clients' needs for positions requiring higher qualifications. In turn, expert points of contact enable us to offer high-level assignments for candidates and to attract talented, qualified and sought-after individuals. Professional Staffing includes the business lines Information Technology, Engineering & Technical, Finance & Legal and Medical & Science, as described below.

### **Information Technology**

The Information Technology segment represented 11% of the Group's revenues in 2013. At Adecco, our Information Technology experts partner with clients to integrate, structure and streamline their IT services and activities. Among others, we provide temporary assignments and permanent positions for IT Developers, Programmers, Consultants, Project Managers, Systems Engineers or Analysts and IT Support for any industry. Main brands include Modis and Computer People.

### **Engineering & Technical**

In 2013, we generated 6% of the Group's revenues in Engineering & Technical. In this field our associates take on assignments and projects on a temporary or permanent basis for key industries such as Electronics, Automotive and Transportation, Energy, Oil & Gas, Utilities, Medical Products, Aerospace, Chemicals and Raw Materials. Main brands include Adecco Engineering & Technical, Entegee and euro engineering.

### **Finance & Legal**

4% of revenues of the Adecco Group in 2013 stemmed from the Finance & Legal business line. In a rapidly changing world, new standards, systems and regulatory requirements are emerging all the time. Finance & Legal specialises in the temporary and permanent placement of talented accounting, finance and legal professionals who work in sectors including Accounting, Finance, Banking, Legal, Construction, Property, HR, Architecture, Management and Marketing & Communications. Main brands include Badenoch & Clark and Accounting Principals.

### **Medical & Science**

The Medical & Science segment represented 2% of Adecco's revenues in 2013. We recruit and place doctors, nurses, therapists, pharmacists and other allied healthcare professionals

on a permanent or temporary basis in the field of Clinical Research, Regulatory Affairs, Pharmacy, Medical Writing, Laboratory Research Science and Sales & Products Support. Our main brands include Soliant and Adecco Medical.

### **Solutions**

Solutions accounted for 2% of revenues of the Adecco Group in 2013 including revenues generated with Business Process Outsourcing, Career Transition and Talent Development solutions as described below.

#### **Business Process Outsourcing solutions**

**Managed Service Programmes (MSP)** Clients increasingly ask Adecco to manage all or parts of their contingent workforce. There are clear advantages in outsourcing the management of contingent labour to us: one single point of contact, speed, enhanced recruitment process and transparency. We can manage the contingent workforce solutions, programme management, reporting and tracking, supplier selection and management, order distribution and even consolidated billing. Our global brand name is Pontoon.

Our **Recruitment Process Outsourcing (RPO)** solution is suited to companies that want to outsource their recruitment process for permanent employees. The entire process includes the search for candidates, CV screening, interviews, candidate assessment, offer management, on-boarding and recruitment administration. We can take care of the whole or part of the process or act as a partner for all the permanent recruitment needs. We reduce costs and complexity for our clients and ensure that they get the right people, with the right skills at the right time. These solutions are also offered under the Pontoon brand.

Clients can also keep the management of their contingent workforce in-house by using our market-leading **Vendor Management System (VMS)** branded Beeline. It is an internet-enabled, web-based application delivered through a software-as-a-service model. Beeline's VMS automates the process of acquiring and managing contingent labour, time and expense and consolidated invoicing. It provides significant improvements in reporting and analytics capabilities that far outperform manual systems and processes.

#### **Career Transition and Talent Development services**

In our Lee Hecht Harrison (LHH) business, we focus on delivering Career Transition (outplacement), leadership development, career development and change management solutions for organisations committed to developing the best talent and becoming employers of choice. We are the world's leading Career Transition and Talent Development services provider.